

# 2018 Annual Report

**I AM  
THE FOUNDATION.**

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**YOU ARE  
THE FOUNDATION.**

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**TOGETHER,  
WE ARE  
THE FOUNDATION.**

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**THE CATHOLIC FOUNDATION**

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**T**o build something that will last, you need a strong foundation. More than 50 years ago, a group of lay leaders in Dallas established **The Catholic Foundation.**

Over the years, the Foundation has grown and continuously raised its abilities to meet the needs of our community and beyond, building churches, strengthening schools and supporting worthy causes.

We could not have done this good work for over half a century without the full support of the people in our Catholic community. Through your support each of you has said, “I am the Foundation.”

Together, through generations of extraordinary generosity, you have built a legacy of meaningful impact and positive change, feeding the hungry, caring for the sick, helping the poor and so much more.

In essence, you are the Foundation.

The Catholic Foundation continues to rely on the individual philanthropic visions and shared commitment of all the fellow members of our extended lay community.

**TOGETHER, WE ARE THE FOUNDATION.**

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## BRAD CAMP

*Donor, The Catholic Foundation*

Brad Camp grew up to be the owner of a very successful real estate management and investment firm in Dallas. But a part of him will always be the eager eighth grader who found at Our Lady of Perpetual Help Catholic School in Dallas the teachers and friends who would help him form his character and lay the foundation of the faith that has sustained him throughout his life. Brad is a donor, giving through The Catholic Foundation to causes and organizations dear to his heart, including OLPH and other schools.

*“My giving is founded on my desire to help young people be able to experience the benefits of a Catholic education.”*

Brad is the Foundation.  
Together with Brad, we are the Foundation.

Brad Camp in the library of his alma mater, Our Lady of Perpetual Help Catholic School.



# TOGETHER, WE ARE THE FOUNDATION.



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## VICKY LATTNER

*Donor, The Catholic Foundation*

Vicky Lattner loves to entertain family and friends in her home. She's also hands-on when it comes to serving the causes she cares most about, volunteering countless hours, taking up leadership roles and providing philanthropic support through The Catholic Foundation. Members of Christ the King Catholic Church and School for over 35 years, she and her husband Doug support many causes including the Boys and Girls Clubs of Greater Dallas, The Crystal Charity Ball, Kidney Texas and her Ursuline Academy of Dallas.

*"Our giving is founded on realizing our responsibility to give back to a community that has given us so much."*

Vicky is the Foundation.  
Together with Vicky, we are the Foundation.

Vicky Lattner  
preparing for guests at  
her Dallas home

## MATT KRAMER

*Donor, The Catholic Foundation*

**A**s a former international steel company executive, Matt Kramer is accustomed to making decisions that have a global impact. In his charitable giving through The Catholic Foundation, Matt and wife Kris make a positive local impact, in their home parish of St. Rita's and throughout the Diocese of Dallas and beyond. Matt also makes a positive difference as CEO of The Catholic Foundation.

*"Our giving is rooted in our belief that philanthropy plants the seed for a better future for generations to come."*

Matt is the Foundation.  
Together with Matt, we are the Foundation.



**TOGETHER, WE ARE  
THE FOUNDATION.**

Matt Kramer on an outing to the Dallas Arboretum with his grandchildren.

## DEAR FRIENDS,

*More than ever, we are committed to our mission of promoting compassionate charitable giving and stewardship that serves donors and the needs of the Dallas-area Catholic community.*

To all our donors who utilize The Catholic Foundation to assist in personal charitable efforts, thank you for your confidence.

We embrace the responsibility entrusted to us to carry out charitable intentions now, and for decades ahead. We exist because of donor generosity, and together, we form a strong foundation comprised of a deep and wide layer of supportive individuals.

On behalf of the Board of Trustees and staff, we're grateful for your support that fuels our vision to be the primary philanthropic leader whose trusted stewardship satisfies our donors' intentions while meeting the needs of the Catholic community.

We achieved significant accomplishments and new initiatives in 2018.

Through a grant from the unrestricted Philanthropy Fund, we enabled leadership teams from 50 parishes in the Catholic Diocese of Dallas to attend the Dallas/Fort Worth Amazing Parish Conference in April.

During the workshop-style format, pastors and parish leadership team members worked side-by-side to build a clear, practical vision of what leadership can look like at their parishes.

By their participation, the parish representatives received professional development involving operations, finance, business strategy and spiritual encouragement to make their parishes the best they can be to enhance our entire Catholic community.

We bolstered our unrestricted Philanthropy Fund last May by rebranding our Board Endowment Fund to The Gorman Society, named in honor of Bishop Thomas K. Gorman, the fourth bishop of the Diocese of Dallas and a founder of The Catholic Foundation. This permanent endowment exists to underwrite the operating expenses of the Foundation.

Through the Gorman Society, 100 percent of our Trustees, and many of our former Trustees, generously help safeguard the Foundation by providing for its future by contributing toward the endowment via current gifts and legacy gifts provided for in their wills.

To make it even easier and convenient to do business with us, we redesigned our website to be highly dynamic. The overhaul included the enhancement of DonorLink that makes it easy for donors to make charitable contributions to a fund and recommend grant distributions to qualified charities, check balances or review grant and giving history any time of day.

The fact that it is simple to give through the Catholic Foundation through online access as we work with, and alongside, donors to establish a charitable fund or make decisions about lifetime charitable giving is one of the things our donors most appreciate about us.

The grants we annually award from our Philanthropy Fund help our Dallas-area Catholic community with a wide-range of critical needs. Last year, our grants helped enhance facilities and infrastructure, introduced more technology in classrooms, enabled children to receive a quality Catholic education and more.

Thanks to the growing interest in the establishment of donor-advised funds for charitable and tax giving purposes, and the growing desire people have toward charitable giving, The Catholic Foundation achieved a strong performance in 2018 despite a rugged U.S. financial market.

At the end of 2018, the Foundation housed more than 440 charitable funds and trusts and managed approximately \$207 million in assets. An increased number of funds and trusts led to more parishes, schools and nonprofits receiving funding for substantial projects.

In 2018, the number of grants issued increased to more than 2,000 organizations totaling \$22.2 million, up from 1,800 grants totaling \$20.3 million in 2017.

The grants included our largest ever in the 64-year history of The Catholic Foundation as we and our Board of Trustees presented \$1.1 million to Holy Trinity Seminary to establish the Cardinal Farrell Student Center that will serve decades of young men on their journey to the priesthood.

*We're blessed to witness the positive impact The Catholic Foundation continually makes in our community. And we look forward to working with you in the year ahead to build an even stronger foundation.*



G. Marc Lyons  
Chairman



J. Matthew Kramer  
President and Chief Executive Officer



## Statements of Financial Position

December 31, 2018 (with comparative amounts as of December 31, 2017)

Assets	2018	2017
Cash and cash equivalents	\$ 2,156,763	\$ 2,216,389
Accounts and trade receivable	707,393	657,199
Receivable from fund manager	-	1,700,000
Contributions receivable	-	1,500,000
Pledges receivable, net	125,022	7,779,623
Beneficial interest in trusts held by others	1,361,423	1,799,032
Investments	147,946,601	160,876,593
Agency funds	53,549,255	53,208,778
Real estate held for investment	491,032	2,635,240
Other assets	593,143	671,811
<b>Total assets</b>	<b>\$ 206,930,632</b>	<b>\$ 233,044,665</b>
<b>Liabilities and net assets</b>		
<b>Liabilities</b>		
Accounts payable and accrued liabilities	\$ 755,165	\$ 886,319
Distributions payable	68,700	61,427
Grants payable	1,728,535	2,436,995
Liability to trust beneficiaries	3,018,861	4,650,415
Agency funds	53,549,255	53,208,778
Deferred revenue	3,962,076	4,395,291
Annuities payable	4,831,568	4,899,524
<b>Total liabilities</b>	<b>67,914,160</b>	<b>70,538,749</b>
<b>Net assets</b>		
Without donor restrictions	26,056,735	31,598,321
With donor restrictions	112,959,737	130,907,595
<b>Total net assets</b>	<b>139,016,472</b>	<b>162,505,916</b>
<b>Total liabilities and net assets</b>	<b>\$ 206,930,632</b>	<b>\$ 233,044,665</b>

To see a full copy of our audited financial statements, please visit us at [www.catholicfoundation.com](http://www.catholicfoundation.com).

## Statements of Activities

Year ended December 31, 2018 (with summarized financial information for the year ended December 31, 2017)

Revenue, gains, and other support	Without Donor Restrictions	With Donor Restrictions	2018 Total	2017 Total
Contributions, net	\$ 1,190,528	\$ 10,544,615	\$ 11,735,143	\$ 14,092,264
Investment income				
Dividends and interest	805,602	2,362,038	3,167,640	2,616,780
Net realized and unrealized gains on investments	(4,208,591)	(7,561,731)	(11,770,322)	15,890,998
Real estate income	11,965	-	11,965	17,437
Investment advisory fees	1,296,770	-	1,296,770	1,444,358
Other	267,902	7,347	275,249	197,152
Loss on uncollectible accounts	-	(1,292,236)	(1,292,236)	(3,243,024)
Change in value of split-interest agreements	(429,160)	847,585	418,425	(718,232)
Net assets released from restrictions	22,855,476	(22,855,476)	-	-
<b>Total revenue, gains, and other support</b>	<b>21,790,492</b>	<b>(17,947,858)</b>	<b>3,842,634</b>	<b>30,297,733</b>
<b>Expenses</b>				
Grants	22,233,665	-	22,233,665	20,382,958
Grants administration	414,701	-	414,701	431,332
Annuity payments and distributions to beneficiaries	411,561	-	411,561	326,284
Annuity payments and distributions administration	239,503	-	239,503	266,315
Development	1,329,832	-	1,329,832	1,318,466
Management and general	2,702,816	-	2,702,816	3,147,946
<b>Total expenses</b>	<b>27,332,078</b>	<b>-</b>	<b>27,332,078</b>	<b>25,873,301</b>
Change in net assets	(5,541,586)	(17,947,858)	(23,489,444)	4,424,432
<b>Net assets at beginning of year</b>	<b>31,598,321</b>	<b>130,907,595</b>	<b>162,505,916</b>	<b>158,081,484</b>
<b>Net assets at end of year</b>	<b>\$ 26,056,735</b>	<b>\$ 112,959,737</b>	<b>\$ 139,016,472</b>	<b>\$ 162,505,916</b>

To see a full copy of our audited financial statements, please visit us at [www.catholicfoundation.com](http://www.catholicfoundation.com).

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*In late 2009 The Catholic Foundation Legacy Circle was created to honor the individuals and families that have made long term commitments to the Foundation, and we are deeply grateful for their trust and shared charitable vision.*

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### Are you ready to realize your philanthropic intentions?

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**1.**

Outline your personal  
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**2.**

Determine how much you  
wish to invest in philanthropy  
now and/or through a simple  
designation in a will or  
trust to establish a named  
charitable fund at the  
Foundation or a gift to the  
Foundation's discretionary  
Philanthropy Fund.

**3.**

Name the fund and  
name the fund advisors.

**4.**

Work with a Catholic Foundation  
professional to determine investment  
and spending policies  
for the fund.

**5.**

Establish your fund with an initial  
gift and/or translate your charitable  
intentions into a lasting legacy  
through your will or trust.

Let's begin the conversation.  
Call 972.661.9792 or email  
[info@catholicfoundation.com](mailto:info@catholicfoundation.com).

**TOGETHER, WE ARE  
THE FOUNDATION.**

Please remember The Catholic Foundation in your charitable planning.  
For more information contact Cheryl Unis Mansour, Michael George  
or Mike Murray at 972.661.9792 or [info@catholicfoundation.com](mailto:info@catholicfoundation.com)

## OUR MISSION

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*The Catholic Foundation promotes  
compassionate charitable giving and  
stewardship that serves donors and  
the needs of our community.*

# THE CATHOLIC FOUNDATION

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