

THE Good Word

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Mike and Mary Terry to Receive the 2014 Catholic Foundation Award

Giving of one's time, talent and treasure has always been a priority for Mike and Mary Terry.

According to the Dallas philanthropists, "For our family, giving back is a key component in a balanced life. If you don't have an element of giving in your life, you are missing something."

Their philanthropic leadership in the community and gracious service to others will be recognized when they receive the 32nd Catholic Foundation Award on Feb. 7, 2014, at The Catholic Foundation Award Dinner.

"Mike and Mary Terry are an extraordinary example of how a family can truly invest itself in its community," said Matt Kramer, president and CEO of The Catholic Foundation. "They inspire others to give back in whatever ways they can, and they epitomize what The Catholic Foundation Award represents."

Mike and Mary met soon after high school and were married while students at The University of North Texas in Denton.

"Our Catholic faith is so important to us; our faith endorses and reinforces the way we give our time and resources. That was true even when we were living paycheck to paycheck," said Mike.

While Mike worked at Terminix, Inc., his family's pest control company, Mary worked at Denton State School with mentally challenged children. In 1978, Mike and Mary settled in Dallas and started a family. At age 26, Mike took over Terminix and grew the company to employ more than 250 people. Today, he runs an investment firm, M. Terry Enterprises.

The generous couple established The Mike & Mary Terry Family Foundation in 2006. Led by a board of family members, the nonprofit foundation focuses on providing equal opportunities for all children, advancing youth through education and ensuring a haven for those in need throughout North Texas. Based on the belief that education is a game changer, The Mike & Mary Terry Foundation supports local organizations that enhance and improve the



quality of life for inner-city children, youth and families, including the homeless and abused.

"Our foundation and The Catholic Foundation share a common commitment to Catholic education. We have partnered with The Catholic Foundation on several important initiatives, because we strongly believe that joining forces can do far more good," said Mike, who has joined Mary in more than 20 years of service to Jesuit College Preparatory School and Ursuline Academy on various Boards, Foundations, Committees and Fundraising Campaigns. The Terrys also are dedicated to supporting local inner city Catholic schools.

Today, Mike is a trustee of the Jesuit School Board, and serves on the boards of Teach for America and St. Paul Medical Foundation,

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THE PRESIDENT'S LETTER

The Catholic Foundation is fortunate to have a broad overview of needs in our Catholic community and the ability to successfully address them. The Foundation's Work of Heart awards, donor advised funds, scholarship funds developed by donors, and the spring and fall grant distribution made available through the Foundation's unrestricted Philanthropy

Fund all address the growing needs of our community.

The Diocese of Dallas recently shared that in 1990 there were 200,000 Catholics in Dallas with 80 parishes and 37 schools. Today, there are over 1.3 million Catholics in Dallas with 80 parishes and 37 schools. Clearly the Catholic infrastructure has not kept up with the growth. The demand for help

from the Foundation and individuals to repair and build new infrastructure for our children and our children's children will continue to increase.

How can you help? My answer to you is – *give through the Foundation*, where 100% of your donation is available for distribution back into the community after 60 days of deposit at no cost to you. Your investment helps build our unrestricted Philanthropy Fund from which we grant out funds twice a year to serve the immediate needs of the local community. Philanthropic recycling at its best!

Thank you to those who already have a fund at the Foundation or have included us as a beneficiary of your will! To all future donors, we invite you to reach out to the Foundation to learn how we might be able to assist you with your philanthropy today and in the future. Let us pray for the continued success of our Catholic community and our country.

J. MATTHEW KRAMER

A Strong FOUNDATION

Outgoing Trustees



Thomas E. Merkel

Four members of the Board of Trustees of The Catholic Foundation are completing their terms at the end of 2013, after distinguished service helping the Foundation meet the needs of the Catholic community during challenging economic times.

Thomas E. Merkel, senior vice president of investments at Merrill Lynch in Dallas, joined the Foundation board in 2001. He served on the Development, Distribution and Executive committees and chaired the Audit and Administration, and Investment committees. Merkel served nine years as a trustee before being named chairman in January 2011. After stepping down as chairman at the end of 2012, he served an additional year in a new position as immediate past chairman, bringing his total years of service to 13.

Serving on the board has been a fulfilling and inspiring time in his life, Merkel said, as a result of the places he visited, the people he met along the way and relationships built with fellow trustees.

"The last thirteen years of service to the Board of Trustees for The Catholic Foundation have been a rewarding and humbling experience," he said. "As a trustee you find yourself involved with the many facets of stewardship throughout the entire diocese. The Catholic Foundation is so far reaching and has allowed for many of us to be involved with outreach beyond our home parishes and live out the Catholic mission."

Other outgoing trustees include:



Jennifer Staubach Gates, a member of the Dallas City Council, who served on the Advisory Council from 2003 to 2007 and became

a trustee in 2008. She served on the Development and Executive committees, chaired the Distribution Committee and served as Secretary and Vice Chairman of the board.



G. Charles Kobdish, partner in the law firm McCall, Parkhurst & Horton LLP, served on the Advisory Council from 2006 to

2007 and became a trustee in 2008. He served on the Distribution, Governance, Investment and Executive committees and chaired the Development Committee in 2012 for two years.



David Rosenberg, partner at Thompson & Knight, served on the Advisory Council from 2003 to 2008 and joined the board

of trustees in 2009. David shared his expertise on the Audit and Administration, Distribution, and Executive committees and chaired the Governance Committee where he guided the Governance Committee through its early stages.

"We are grateful to Tom, Jennifer, Chuck and David for their passion and service to The Catholic Foundation," said Thomas W. Codd, Jr., chairman of the board of trustees.

"Each brought a diversity of professional experience and involvement in the Catholic community to their work on the board and organizations we serve."

MARY AND MIKE TERRY TO RECEIVE THE 2014 CATHOLIC FOUNDATION AWARD

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.....
on the Advisory Council for The Catholic Foundation, and on the Cristo Rey Dallas Feasibility Steering Committee.

Mary, a fourth generation Texan, has a family heritage of service and generosity which helped develop her philanthropic spirit. She has given her time to many organizations including the Junior League of Dallas and Ursuline Academy. She is currently involved with St. Rita Catholic Church, The Bridge and Our Lady of Perpetual Help Catholic

School and is a trustee on the Notre Dame of Dallas School Board.

Mary and Mike are both members of the Order of The Holy Sepulchre and are Honorary Co-Chairs of the "Our Faith Our Future" Capital and Endowment campaign for the Diocese of Dallas. They were honored with the 2009 Association of Fundraising Professionals Philanthropist of the Year Award and The 2012 Bridge Builder Award.

"Who are we to be blessed like we have been? God has given us so much, and it is our responsibility to use it wisely and to help others," said Mary.

Mike and Mary attend St. Rita's Catholic Church and have three children: Melissa, Michael and Travis, one son-in-law, Dustin

Pridmore, and three grandchildren, Kennedy, Bailey and Owen.

"Through this award, we hope to encourage even more people to give of their talent and resources, because the ripple effect can have a tremendous impact on all involved," said Mary.

Mike and Mary were humbled to receive such an honor from The Catholic Foundation, an organization they consider to be a true philanthropic leader in the community.

"To be recognized in this way, by The Catholic Foundation, is the ultimate honor. When you look at previous recipients, it is a list of remarkable people who have made a huge impact on Catholic education and the community. Mary and I want to continue to live up to this honor," said Mike.

Giving SPIRIT



Giving 101

by Cheryl Unis Mansour, Vice President of Development

IRA ROLLOVERS

The deadline is fast approaching for a giving tool popular with taxpayers and charities. A year ago, when Congress reached the “fiscal cliff” deal, it also extended the IRA charitable rollover that had expired at the end of 2011. To be eligible, charitable rollovers must be made by the end of December 2013.

The IRA charitable rollover allows investors 70-1/2 or older to make tax-free distributions of up to \$100,000 a year from an individual retirement account directly to eligible

charitable organizations. And, an IRA rollover gift applies toward a taxpayer’s required minimum distribution for that year. The rule applies only to qualified charitable distributions made before January 1, 2014.

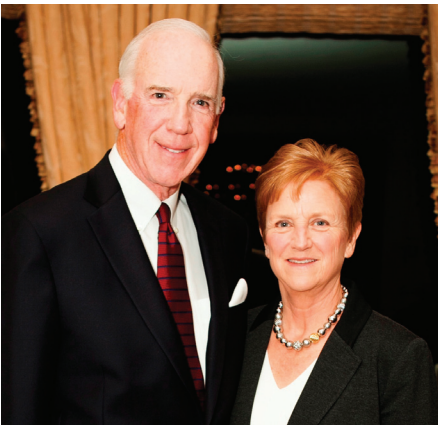
Donors to organizations like The Catholic Foundation appreciate the flexibility an IRA rollover offers by allowing them to avoid income taxes on their required minimum distributions and at the same time support worthy causes. Charitable gifts from IRAs may be made to designated funds but not to donor advised funds, so the Foundation encourages anyone considering an IRA rollover to think

about using that charitable gift to create a designated fund that will provide an annual income stream to your favorite charity. Designated funds at The Catholic Foundation allow the donor to narrow the focus of charitable giving by specifying a particular charity to support, such as a school, hospital or parish food pantry.

To learn more about making a charitable gift from your IRA and how The Catholic Foundation can help you tailor the gift to meet your charitable objectives, please call us at 972-661-9792.

Donor Profile:

JOE & KATHY MURPHY



Joe and Kathy Murphy

When a career with PricewaterhouseCoopers (PwC) brought Joe and Kathy Murphy to Dallas, the East Coast transplants worked hard to make North Texas their home. Except for an eight-year stint in Detroit, they’ve lived in the area ever since 1977 after Joe’s graduation

from La Salle University in Philadelphia. Joe and Kathy, both native Philadelphians, established roots in the local Catholic community, where their two sons attended Jesuit College Preparatory and their daughter went to Ursuline Academy.

The Frisco couple attends Our Lady of the Angels in Allen. Joe, retired since 2006 as a PwC partner, joined The Catholic Foundation’s board of trustees in 2009. He and Kathy, who once worked as a nurse, also became members of the Legacy Circle when they established a planned gift to the Foundation in their wills. Joe serves as a trustee of the University of Dallas and Bishop Dunne Catholic School, is a member of the board of Our Lady of Perpetual Help Catholic School, and recently completed service as a school and foundation trustee at Jesuit College Preparatory.

Joe, who recently worked on the Committee for Excellence for Catholic Schools in developing a strategic plan for diocesan Catholic elementary schools, said the health and education of children are the couple’s passion. He even got involved with an

orphanage, one of Mother Teresa’s charities, while spending almost a year in New Delhi on a consulting assignment with PwC India.

In addition to their planned gift, the Murphys have a donor advised fund at the Foundation, which they’ve used to support local organizations, including the University of Dallas, Our Lady of Perpetual Help Catholic School, Bishop Dunne Catholic School and Catholic Pro-Life Committee.

“I like the ease and flexibility of the donor advised fund.”

Joe Murphy

The donor advised fund is an ideal way to manage their charitable giving, Joe said. “I like the ease and flexibility of the donor advised fund,” he said. “We very much support the principles, guidelines and focus of The Catholic Foundation. The Foundation is a fine steward of its funds. I find it a prudent way to support the organizations we care deeply about.”

A LIGHT On

FALL GRANT DISTRIBUTION



St. Vincent de Paul Thrift Store continues its pick-up service in the DFW area and will open a new store in North Dallas this year.

Twenty-five Dallas-area schools, churches and organizations will be able to renovate or construct facilities, enhance technology, replace equipment, assist students with tuition, and support programs, thanks to \$792,990 in grants recently made by The Catholic Foundation during its Fall Distribution cycle.

Many of the awards will enable Catholic schools to construct, repair or renovate facilities. Bishop Dunne Catholic School will renovate and update its auditorium, Epiphany Quasi-Parish (Italy, Texas) will renovate and expand its parking facilities, and The Highlands School will relocate its main office. Immaculate Conception Church of Corsicana will renovate, Our Lady of Perpetual Help Catholic School will replace its gym floor, and St. Ann Church

of Kaufman will repair stained glass windows in its church and chapel.

Other grants will help Santa Clara Catholic Academy update its electrical system, St. James Catholic Church complete miscellaneous repairs on its school building, and St. Joseph Catholic Church of Waxahachie construct a plaza in front of the church. Awarded grants will fund renovation of the women's restrooms and recovering of pews at St. Jude Chapel, update of the security system and purchase of new exterior doors at St. Mary's School of Sherman, design/construction documents for restoration and renovation of St. Patrick Catholic Church of Denison, and window replacement in St. Joseph Hall at Sisters of Our Lady of Charity.

Two schools, Good Shepherd Catholic School and St. Patrick Catholic School, will expand technology, while St. Vincent de Paul



The Kids Eat Free program feeds more than 1,500 disadvantaged children during 11 weeks of summer.

Thrift Store will purchase a cargo truck. Other grants from the Foundation will support academics, including tuition assistance at Good Shepherd Catholic School and Our Lady of Perpetual Help Catholic School, Catholic high school scholarships, and Catholic student scholarships and Catholic teacher workshops at the Dallas Holocaust Museum.

Still other awards from the Foundation will support ongoing programs, including the Elderly Services Program at Catholic Charities, the Catholic Pro-Life Committee, Christian Community Action's "Kids Eat Free" summer 2014 lunch program, the Work of Heart Program honoring Catholic teachers and staff, and the Zero to Five Funders Collaborative/"Together We Learn" Program of Catholic Charities. Other grants will support a feasibility study of the Cristo Rey Network's "Cristo Rey Effort," and Heroic Media's 2014 winter TV and Google ad campaign.

"The Catholic Foundation is proud to award grants to these worthy schools, churches and groups who do so much to improve the education and health of our community," said Raul Estrada, Catholic Foundation trustee and Distribution committee chair. "And we express our gratitude to the donors who entrusted their charitable gifts with the Philanthropy Fund so that our trustees can help identify needs and direct funds to support each organization's mission."

PHILANTHROPY FUND

One of The Catholic Foundation's oldest funds has a new name to raise the profile of a fund that's been meeting the needs of the Catholic community for more than two decades.

The unrestricted Philanthropy Fund, formerly known as the Unrestricted Fund, has granted \$25.5 million over the last 20 years and has been the primary source of grants to support the various religious, charitable and educational purposes in the Diocese of Dallas.

The Foundation chose the name Philanthropy Fund to emphasize its important function as a permanent source of income for funding to meet both immediate and emerging community needs. Twice a year, the

Foundation's trustees award grants from the fund after determining where gifts will do the most good, both in the present and in the future.

Donors from all walks of life can help Catholic organizations improve life in the community. "We do welcome one-time gifts of all sizes to the Philanthropy Fund," said Matt Kramer, president and CEO, The Catholic Foundation. "Philanthropy can be practiced by everyone, not just the wealthy. When you give to the Philanthropy Fund, you give to our mission of serving the needs of all of our community. Your heart may be tied to helping several initiatives, and a gift to the Philanthropy Fund will help you serve all of your charitable interests."

Bishop Dunne Catholic School has been a beneficiary of grants from the Philanthropy Fund. "The Catholic Foundation has given

us grants for indispensable items that are decidedly unglamorous but necessary for the everyday function of the school, such as boilers, moisture remediation projects, and sound system and technology upgrades," said Kate Dailey, president of Bishop Dunne. "Students are able to work in a more comfortable environment and be proud of their facilities."

Bishop Dunne is just one of the Catholic organizations looking to the Foundation for leadership and support of their missions, allowing Foundation trustees to have a pulse on where the needs are. The Foundation understands the community's needs and that is why our donors can look to us for guidance on their charitable giving plans as well. The Philanthropy Fund allows us to better serve the community and our donors.

ART WALL DEDICATION



"Homage to The Concertgebouw," by local artist and businessman James W. Keyes was unveiled at The Catholic Foundation Plaza in the Dallas Arts District on Oct. 9th. The artwork was inspired by the stained glass windows of The Concertgebouw of the Netherlands, where the Dallas Symphony Orchestra played last year to rave reviews. Pictured above (from left to right) Most Rev. Bishop Kevin Farrell, Cheryl Mansour, Vice President of Development, The Catholic Foundation, and James W. Keyes, winning artist. To read more about this year's winner and to view the art submitted in the competition as well as images from the unveiling ceremony, visit www.catholicfoundation.com.

LEGACY CIRCLE DINNER 2013

This year's Legacy Circle Dinner was held on September 26, 2013. The Legacy Circle honors individuals who have made long-term commitments to the Foundation through planned gifts such as bequests, permanent endowments or charitable trusts.



Martha and David Alameel



Tom Codd, Chairman of The Board of Trustees, and Linda and Tom McCarthy

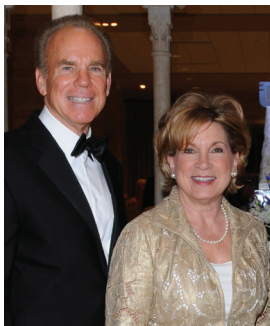


Michael George, Senior Development Officer for The Catholic Foundation, and Carmen and Joe Coleman



Sherry and Joel Fontenot

2014 DINNER COMMITTEE



Roger and Marianne Staubach

Marianne and Roger Staubach will chair The Catholic Foundation Annual Award Dinner on Friday, February 7, 2014, at the Hilton Anatole in Dallas. They will lead a committee of 65 volunteers for the Foundation's 32nd annual dinner.

Marianne served on the Foundation's board of trustees from 1996 to 2005 and on the Advisory Council since 2006. She was the

recipient of the The Catholic Foundation Award in 2009. Marianne and Roger are philanthropists in their own right, having established the Staubach Family Foundation in 1979 as part of their estate planning. The foundation is run by their daughter, Amy Mentgen, and supports a variety of local charitable organizations.

"We are excited to be the dinner committee chairs for the 2014 Catholic Foundation Award Dinner honoring Mike and Mary Terry," said Marianne Staubach. "Their work in the community is a true representation of philanthropy, and they are most deserving of the award."

To pre-reserve your table at the 2014 Annual Award Dinner, please call 972-661-9792 or visit www.catholicfoundation.com.

JEFFREY N. PENNELL TO BE FEATURED SPEAKER AT ADVISORS SERIES

Jeffrey N. Pennell, the Richard H. Clark Professor of Law at Emory University, Atlanta, returns to Dallas and will present at the 2013 Professional Advisors Series, Tuesday, Dec. 10, 2013, at the Belo

Mansion in Dallas. His topic will be *Year-in-Review: Selected Important Estate Planning Developments; Myths, Mysteries And Mistakes: Common Transfer Tax Concepts That Are Not Well-Known Or Understood.*

Breakfast will start at 7:30 a.m. and the program will run from 8:00-10:15 a.m. Two hours of continuing education credit will be available, no prerequisites required. Online registration is available. For more event information and sponsorship information, visit www.catholicfoundation.com.

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The Good Word

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or faxed to 972-661-0140.

For additional information regarding the Foundation, please call 972-661-9792 or refer to: www.catholicfoundation.com



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