

# THE Good Word

VISIT OUR WEBSITE: [www.catholicfoundation.com](http://www.catholicfoundation.com)

## ENTREPRENEUR RAUL ESTRADA TO RECEIVE 2019 CATHOLIC FOUNDATION AWARD

The Catholic Foundation will honor Dallas-based entrepreneur Raul Estrada with the 37th Catholic Foundation Award on Saturday, February 16, 2019, at the Hilton Anatole Hotel, with Alfredo and Irma Duarte serving as the 2019 Dinner Chairs.

The Catholic Foundation Award spotlights an individual's distinguished service and support to further the religious, charitable and educational needs within the Catholic Diocese of Dallas. Estrada will be recognized for his Christian example and inspiration, as well as his outstanding abilities to make positive changes throughout the local Catholic community.

"With his exceptional entrepreneurial expertise and generosity, Raul Estrada has made profound impacts in our Catholic community by connecting and motivating people to good works. The Foundation is humbled and honored to recognize a man of his faith with The Catholic Foundation Award," said Matt

Kramer, president and CEO of The Catholic Foundation.



Raul and his parents immigrated to Dallas from Mexico when he was a young child, and his grateful spirit and amazing work ethic was apparent even in elementary school. With

tuition assistance, he was able to attend St. Anne's Catholic School, Holy Trinity Catholic School, St. Mary of Carmel Catholic School and Bishop Lynch High School. Before he turned 16, Raul had worked 9 different jobs in the Dallas area. With dedicated mentors and Raul's great attitude, he was working for himself as an entrepreneur by the age of 26 and has been ever since. There are now multiple locations of his restaurants, Las Ranitas and Los Sapitos. He began his construction business by building and finishing out new restaurants as well as building and financing homes for his employees.

A restaurateur, construction business owner and real estate developer, Raul utilizes all his skills and connections to help those in need. He has saved the Diocese millions of dollars by participating in and managing construction projects at St. Mary of Carmel, Our Lady of Perpetual Help School, St. James Parish, Cristo Rey High School, Catholic Charities

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### THE PRESIDENT'S LETTER

As a lay-led organization, The Catholic Foundation exists to support donors in their philanthropic endeavors by creating charitable funds and charitable trusts. We are autonomous from the Catholic Diocese of Dallas, as we are a separate 501c3 organization. We consider it a great privilege

to steward charitable funds and trusts for so many individuals, families, churches, schools and other nonprofit organizations.

We are governed by an all-volunteer Board of Trustees that serves the Foundation's mission with richly diverse wisdom, experience and expertise as well as common compassion and generous vision. We invest, monitor and grant monies from each Foundation fund according to the specific philanthropic purpose as described in the agreement when the

fund is established. Donors to The Catholic Foundation are investing in our Catholic community for their grandkids and great-grandkids. They are also investing so their personal causes, including those outside of the Catholic community, continue to receive support. The Foundation ensures their charitable intentions are carried out in perpetuity.

From January 1 through June 30, 2018 the Foundation has granted approximately \$10 million. Roughly 90% of those grants went to Catholic causes, and 70% of the grants were made to organizations here in North Texas.

Thank you to all our donors passionate about making a difference in our community. We are honored to help steward the funds and gifts you have contributed. We will continue to do so with the utmost respect, consideration and expertise, as we know you have entrusted us with your legacy. 🙏

J. MATTHEW KRAMER

# A Strong FOUNDATION

## Annual Advisory Council Breakfast

Philanthropist and businessman Chris Kleinert, president and CEO of Hunt Consolidated Investments, addressed the Foundation's Advisory Council at their annual breakfast meeting in September. Moderating part of the program was Catholic Foundation Trustee, Rob Bertino. Chris highlighted the importance of giving back to the community and the many ways one could embrace "Business and Philanthropy."

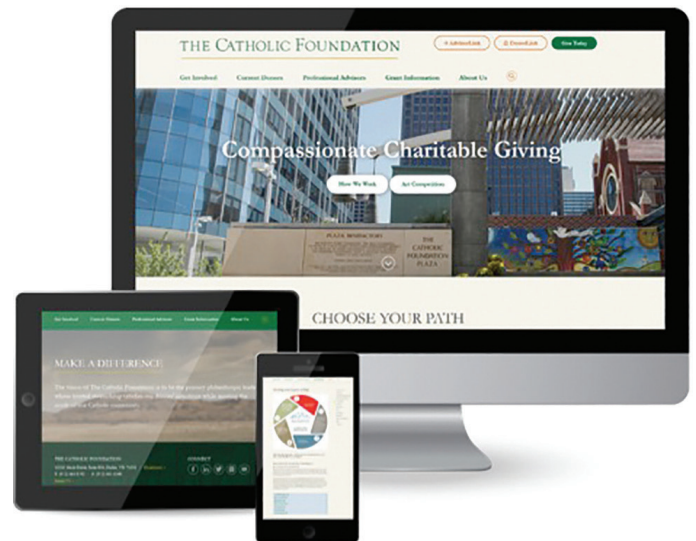


**First Picture:** (L to R) Rob Bertino, Trustee, The Catholic Foundation; Chris Kleinert, President & CEO Hunt Consolidated Investments; Lydia Haggard Novakov, Chairman of the Advisory Council, The Catholic Foundation; John Landon, Chairman of the Board of Trustees, The Catholic Foundation; Cheryl Unis Mansour, Vice President of Development, The Catholic Foundation  
**Second Picture:** (L to R) Chris Kleinert and Rob Bertino



## WE HAVE A NEWLY UPDATED WEBSITE

Our newly updated state-of-the-art website, [www.catholicfoundation.com](http://www.catholicfoundation.com), is live and easy to use across any device. Our new look features easy navigation and event registry, ability to check fund activity and much more. Email us at [info@catholicfoundation.com](mailto:info@catholicfoundation.com) to update your mailing preferences and contact information.



## 12th Annual Professional Advisors Series for Estate and Wealth Management Professionals

A reminder to Save the Date! The Catholic Foundation's annual Advisors Series is scheduled for November 8th, 2018 at the Belo Mansion at 7:30am. This year we welcome Jonathan G. Blattmachr who will be presenting "New Angles of Estate and Income Tax Planning for Individuals." Further program and registration information can also be found on our website homepage [www.catholicfoundation.com](http://www.catholicfoundation.com).



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# Giving SPIRIT



## Giving 101

by Cheryl Unis Mansour, Vice President of Development

### Maximizing Your Charitable Giving

In working with donors and various charities we see that people give for many different reasons. They give because they want to support a worthy cause, their faith community and schools, receive recognition, respond to disaster emergencies, to honor or memorialize a loved one or educate the next generation of leaders. The Tax Cuts and Jobs Act of 2017 (TCJA) may impact how and when people make charitable contributions so they can take maximum advantage of charitable deductions under the new rules that may limit both charitable and other itemized deductions.

There are three things to consider that may help you do the most good for your favorite causes and your taxes at the same time:

- 1.** Organize your charitable giving through a Donor Advised Fund: A Donor-Advised Fund (DAF) at The Catholic Foundation is a personal charitable fund that provides flexibility and
- 2.** Donate appreciated securities for maximum tax savings: Donating assets that have appreciated for at least a year — such as publicly traded stock and real estate — can significantly increase your tax savings. Using these types of gifts avoids the capital gains tax, leaving you more money to give to charity.
- 3.** In light of the new tax law financial advisors have suggested “bunching” charitable

contributions to maximize the tax advantages, make larger gifts in specific years and limit your donations in other years. One strategy is to use a Donor Advised Fund to hold charitable funds for giving later; staggering perhaps over several years distributions to charities from a DAF may be better than a single charitable contribution every few years. When individuals “bunch” donations, they combine multiple years of “normal” annual contributions into a single year, potentially saving the tax deduction.

While we cannot render tax advice, we are able to advise you on how to make the most of your charitable giving through The Catholic Foundation. Please call me, Cheryl Unis Mansour, Michael George or Mike Murray if you should have any questions at 972-661-9792. We welcome the opportunity to discuss your charitable goals with you and/or your professional advisor. 🐟

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### DONOR PROFILE

## Henry and Margaret Hermann

As long-time members of the St. Vincent de Paul Conference at Christ the King in Dallas, Henry (Hank) and Margaret Hermann have dedicated themselves to serving the poor as an expression of their Catholic Christian faith. When they decided to add a philanthropic giving fund to their face-to-face service, a Donor Advised Fund with The Catholic Foundation was the natural choice.

“We are very pleased with that choice, as Cheryl and all her associates at the Foundation have been wonderful. So far, the investment

results have increased the value of our Fund’s balance, making more dollars available to donate,” said Hank.

He also noted that the Fund has enabled the Hermanns to separate the “funding” from the “giving” aspect of the process. They may donate into the fund at a time when tax or other considerations make “funding” attractive. And, with the funding already in place, it becomes much easier to make a “giving” decision when the opportunity arises.

The Hermanns focus on supporting programs that have the prospect of breaking the cycle of poverty, including healthcare and education. They helped students attend and graduate from both Our Lady of Perpetual Help and Bishop Dunne Catholic School. They also supported the St. Vincent de Paul’s Mini Loan Program, which helps rescue those trapped in predatory loans.

Today, the St. Vincent de Paul Pharmacy remains the Hermann’s primary focus, as they believe everyone should have the dignity

of access to health-sustaining prescription medications. The fully-licensed Class A community pharmacy opened for operation in March 2018 in the Vickery Meadow section of Dallas, and it is the first free pharmacy serving the general public in Texas.

Uninsured lower-income individuals who qualify for service at the pharmacy receive the prescription medications they desperately need to maintain their health even though they may lack the financial ability to pay for them. Access to free prescription medications gives them an increased opportunity for stable employment as well as a greater ability to pay for other life essentials.

“I am very fortunate to have had the privilege of being involved in the creation of the St. Vincent de Paul Pharmacy, and we are very pleased with our initial results,” said Hank.

The Hermanns’ experience with The Catholic Foundation illustrates the personal, spiritual and financial satisfaction that can be found when one aligns passions with giving. 🐟

# A LIGHT On

## THE CATHOLIC FOUNDATION SCHOLARS AWARD WINNERS: WHERE ARE THEY NOW?

Each year at our Annual Award Dinner, The Catholic Foundation awards a scholarship to a deserving junior at one of the Catholic Schools within the Diocese of Dallas.



**FAITH NOAH**

“ I always remember The Catholic Foundation fondly, as you all helped remind me of the importance of Catholic values in the midst of an academically challenging environment. ”

Faith is currently a senior at Vanderbilt University studying neuroscience. After graduating with honors, she plans to pursue a medical career and dreams of working internationally once she has finished her studies. During her time at Vanderbilt, she has been highly involved with University Catholic, serving as the chair of the group's service and intellectual pillars as well as a member of the executive board. She is also part of Vanderbilt's Ingram Scholarship Program, which requires her to complete 20 hours of community service each month. Through this program, she connected with the nonprofit Amigos for Christ and received the opportunity to work in rural Nicaragua for nine weeks on a sustainable mental health and workplace stress assessment. 🐟



**MIRANDA COLLETTA**

“ I know the Catholic Foundation is very selective in choosing who receives the scholarship, and I was extremely honored to have been nominated for it by Ursuline Academy, let alone be the ultimate recipient. Receiving it boosted my confidence and gave me extra courage to continue pursuing my goals. ”

After graduating from Ursuline in 2007, Miranda went on to receive a Bachelor of Science honors degree in biology from the University of Texas at Austin in 2011. Miranda was a Dean's Honored Graduate and the student commencement speaker at her graduation. She then attended medical school at Washington University School of Medicine in St. Louis, where she earned her Doctor of Medicine in 2015. In addition to being engaged to fiancé Timothy Horton, Miranda is currently a third-year Otolaryngology resident at the Medical College of Wisconsin. 🐟



**PATRICK ANDREWS**

“ The Catholic Foundation Scholars Award's biggest impact in my life was in helping me see the fantastic community around me, both from the Cistercian community and the broader local Catholic community. It gave me a sense of mission, a desire to bear the torch of philanthropic love into the future. This is the community that has served me my whole life, and I look forward to serving it in return today and for the rest of my days. I also credit the Catholic Foundation Dinner in 2016 for sparking my relationship with Fr. Abbot Denis, which has grown into one of my most intimate friendships. ”

In addition to being elected president of the student body during his senior year at Cistercian, Patrick graduated valedictorian with the award for top student in the humanities as well as the MVP award for his track team. He is currently pursuing a degree in philosophy and classics at the University of Dallas and plans to enter Catholic education after graduation. 🐟

# WHAT OUR DONORS SAY ABOUT DONORLINK

Our online DonorLink system makes it very easy to make charitable contributions to a fund and to recommend grant distributions to qualified charities, at any time of day. Our recently upgraded software allows donors to easily check and print fund balances, recommend a grant, or check their grant history through DonorLink. Users simply login with a Login ID and password from the homepage of our newly updated website. Our donors explain it best:



## BILL SLADEK

“Mary and I have been so pleased with the DonorLink system. It is incredibly easy to use, intuitive, and efficient. With just a couple of clicks, we can contribute to our fund, request distributions, and check our fund balance and grant history. And, it has dramatically simplified our recordkeeping. It’s the consummate charitable giving one stop shop.”



## THE FLIP HOWARD FAMILY

“It’s a win-win because it enables the Catholic Foundation to do good work for great causes, and beyond that, it’s easy for me.” –Flip Howard



## HOWARD MANNING

“Mary and I have maintained a Donor Advised Fund at The Catholic Foundation for 20 years. We have enjoyed following along with all the enhancements and improvements to the delivery system for initiation of a grant. What used to be a very slow, time consuming and cumbersome process fraught with numerous possible errors or mistakes is now almost completely automated and can be easily handled in just a few minutes, online, without having to make a telephone call, send an email, or be concerned about the amount on deposit in our Donor Advised Fund.”



## JOAN AND TOM STEPHENS

“I do most of my bill paying online and love the flexibility of DonorLink. I can schedule The Catholic Foundation to make monthly payments to St. Mark and the Bishops Appeal. That alone relieves me of having to remember to send payments every month. I love being able to request payments to other charities outside of The Catholic Foundation’s office hours, since it is usually very early in the morning or on weekends when I get a chance to catch up with finances. I appreciate being able to keep current on the balance in our account.” –Joan Stephens

### Entrepreneur Raul Estrada

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Dallas, St. Jude Center and more. Whether new construction or restoration projects, his team provides excellent work efficiently and effectively. Proof of their talent can be seen throughout the Dallas area.

In addition to his commitments to parishes and local Catholic schools, he is a founding board member of Cristo Rey Dallas and served as a trustee of The Catholic Foundation for six years. He currently serves as a board member of Catholic Charities and is a founding board

member of #BeGolden, a social awareness campaign that seeks to deliver a message of unity, civility and empathy for our immigrant community by following the Golden Rule.

Raul lives in Dallas with his wife Carmen. They have four children—Mariela, Raul Jr., Alejandro and Jimena. They are parishioners at The Cathedral Shrine of The Virgin of Guadalupe and also attend St. Mary of Carmel from time to time.

“I feel honored to have even been

considered for The Catholic Foundation Award. I’m a very small part of an extraordinary group of people that I have the privilege of working with on these projects. I would like to accept this award on behalf of those who have always collaborated with me,” said Estrada.

Table and individual reservations for the 2019 Catholic Foundation Award Dinner can be made at [www.catholicfoundation.com](http://www.catholicfoundation.com). 🐟

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**The Good Word**

The Good Word is published to provide news and information about The Catholic Foundation's activities and programs. Any questions or comments should be sent to:

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