

# THE Good Word

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

## Good News: YOUR SUPPORT MAKES A DIFFERENCE

Fundamentally, as its name suggests, this newsletter is about “Good Words,” the Good News of the work of the Catholic Foundation. It is a tangible way to affirm the good works your support makes possible in our community.

Our world today is blessedly full of good news and good works – grants given to make dreams come true, hopes shared so that tomorrow will be a better day for all of us and especially for those in need. When the Catholic Foundation distributes \$1.2 million from the Unrestricted Endowment Fund in grants throughout our



community each year, it is clear: your charitable giving makes a very real difference.

In times like these, however, it is possible for our good news to be overwhelmed. Rapid growth of the Catholic population, a failed economy, and a society burdened by uncertainty have resulted in profound needs that are outpacing our Foundation resources. Here we are, the “Go-To” institution in the Diocese for charitable giving and charitable grants, and our ability to respond, despite our commitment to do so, is a challenge.

*(continued on page 5)*

### THE PRESIDENT'S LETTER



“How is The Catholic Foundation doing?” is a question that I get very often, and my standard response is “we are doing great—but could do better.” The challenges of building the Foundation to a size that matches our vision are many. We want to be able to provide the financial resources when needed to help every parish, school and ministry achieve their vision as well.

When it comes to achieving the growth we think is needed to support the needs throughout our Diocese, The Catholic Foundation takes the longer path. The Foundation’s development effort is focused on not only the long term success of our grant beneficiaries but also the long term goals of our current and future donors. That is the reason we are not a fund raising organization with an annual campaign. We leave that up to the many other Diocesan entities seeking your support. Instead we assist families and individuals in developing gift and estate

plans that can result in benefits for the immediate family and achieve their charitable goals at the same time. We often work with a donor over months or even years while they complete their planning. Those plans can include their will, a charitable trust, a donor advised fund or an endowment. The Foundation and charity may not realize the benefits of the planning for many years. The year 2008 was a good example of that at the Foundation when we received gifts over \$13 million which had been planned many years before.

At the Foundation we are constantly engaged in charitable gift planning. That is our expertise and we hope that as you consider the charitable aspects of your long-term plans that you will let us help you.

A handwritten signature in black ink that reads “Edwin M. Schaffler”.

EDWIN M. SCHAFFLER

# A Strong FOUNDATION



## BOARD WELCOMES FIVE NEW TRUSTEES

Five church and community leaders were selected to service on the 2010 Catholic Foundation Board of Trustees as 2010.

According to Board Chairman Robin P. Hartmann, the five new trustees are: Walter Adams, Lisa Dickson, Joe Murphy, Raul Estrada, and Dave Woodyard.

Mr. Adams, a member of Christ the King parish, is a retired money manager who was a partner in John McStay. Ms. Dickson is also a member of Christ the King, and brings to the board an extensive background in finance, having worked with Brinker International 14 years. She is currently a member of the accounting faculty at SMU.

Mr. Estrada, who belongs to the Cathedral parish, is a businessman and owner of five restaurants known as Las Sapitos and Las Ranitas. An active participant in the Hispanic Catholic community, he took a leading role in constructing the community center at St. Mary of Carmel parish and soccer fields in South Dallas.

Mr. Murphy, a retired partner with PriceWaterhouse Coopers, LLC, who belongs to Our Lady of Angels Parish in Frisco returns to the Catholic Foundation board after leaving due to a transfer by PriceWaterhouseCoopers to its Detroit office. A member

of the Foundation's Advisory Board, he, like Mr. Adams and Ms. Dickson, brings financial and accounting expertise to the Board.

Mr. Woodyard, who attends St. Rita, is the Executive Vice President for Business Development for ClubCorp, Inc., and is looking forward to sharing his skills developed in business and construction management.

Foundation President and CEO Ed Schaffler notes, "Once again the Foundation board has been blessed with capable leaders drawn together from diverse communities and professions by their faith and commitment to serve the Mission of the Catholic Foundation. We are grateful for our trustees' many generous contributions of time, talent, and treasure."

Mr. Hartmann also announced the following trustees will be serving as Board officers through 2010: Vice Chairman, Tom Merkel; Secretary, David Small; Chair of Audit and Administration, Tom Codd; Chair of Development, Chuck Kobdich; Chair of Distribution, Jennifer Gates; and Chair of Investments, Kathy Muldoon. As Board Chair, Mr. Hartmann also heads the Nominating and Executive committees.

Top: New Trustees (Left to Right) Joe Murphy, Dave Woodyard, Lisa Dickson, Walter Adams and Raul Estrada

## Good News

*(continued from page 1)*

Take capital projects in the Diocese, for example: we calculate an investment of \$75 to \$100 million will be required in the next three years to rebuild churches, to house growing parishes, to renovate the Cathedral. . . the list goes on. The Foundation has responded; but clearly, \$1.2 million a year for capital projects and the essential ministries and services needing support, can seem like that proverbial drop in the bucket. The Foundation board, the Foundation staff, the Foundation donors – all of us – would like to be able to do so much more.

How do we make that happen? We keep the good news in front of our community. We showcase the role responsible charitable giving plays in making a difference in every day lives. We encourage more donors and potential donors to make charitable giving part of their estate plans and part of their financial and spiritual practices. We provide expert philanthropic counsel, and a variety of financial tools and fund options that make charitable giving pro-active, effective and personally satisfying. We continue to report on the compelling needs in our community and to trust in your support.

Call us. We're here to help you serve.

# Giving SPIRIT



## Giving 101

by Cheryl Unis Mansour, Vice President of Development

### THE STATE OF THE ESTATE TAX

It sounds like a pretty good idea: no estate taxes this year.

It is actually a very complicated idea, one fraught with uncertainty in these challenging economic and contrary political times.

What's an individual to do? How does one's estate plan work (or does it work at all?) when, one year, there's a \$3.5 million estate

tax exemption and a 45 percent post-exemption tax rate, and the next year there's no exemption and no estate tax at all, but the potential for huge capital gains taxes? And what if, the next year, all bets are off and estate taxes return, as currently legislated, to what they were prior to the Bush tax cuts, with an exemption of \$1 million per estate and a post-exemption tax rate of 55 percent?

These significant changes makes estate planning difficult. At the Foundation, we encourage our donors and potential donors

to work with their professional advisors to keep their estate plans flexible and up-to-date, and to take advantage of every opportunity to direct their resources precisely where they want them to go – to family members and other heirs and to charities of their choice – rather than to taxes.

As always, the Foundation welcomes your questions and interest and would be happy to help you develop your most effective charitable legacy.



Collier, a partner with Thompson & Knight LLP, shared his expertise and counsel with a full house (pardon the pun) at the spring meeting of The Catholic Foundation's Catholic Community Network.

He informed the audience what contributions qualify for a charitable deduction and he underscored the importance of the charitable event chairmen consulting with lawyers to make sure they are in compliance with the legal issues of fundraising via charitable raffles, poker tournaments, auctions and other gaming activity.

In sum: Don't take a chance. Consult your attorney. And follow the law.

To access Mr. Collier's outline of this program visit our website at [www.catholicfoundation.com](http://www.catholicfoundation.com) in the Learning Section under Catholic Community Network.

Through Catholic Community Network, the Catholic Foundation provides regular educational and networking programs for benefactors and ministry leadership in the Dallas diocesan community. To receive our monthly e-mails, contact [virginia@catholicfoundation.com](mailto:virginia@catholicfoundation.com). 

### STEP RIGHT UP! TAKE A CHANCE!

For good or bad, right or wrong, the Catholic Church has a long-standing association with Bingo games. And raffles. And auctions. And Poker tournaments.

So what's a law-abiding, Catholic, fund-raising nonprofit organization to do in a state where gambling is otherwise illegal? Attorney Tyree

Over 180 professionals attended the third annual Advisors Series for Estate Planning Professionals the was held at the Belo Mansion on December 8, 2009 featuring Jeffrey N. Pennell from Emory University in Atlanta, Georgia who spoke on Hot Topics and Current Developments in Tax Legislation and Current Cases with Planning Significance.



Left: Jeffrey Pennell

Right: Ed Schaffler welcomes John B. Attanasio, Judge James Noel Dean and Professor of Law and William Hawley Atwell Chair of Constitutional Law Southern Methodist University, Dedman School of Law.

# A LIGHT On

## TURNING THE PAGE TO HELP STUDENTS LEARN

It is impossible, really, to get an education – even in the best of Catholic schools – if you cannot read. But if you cannot read because of vision loss or impairment, a physical disability, a learning difference such as dyslexia, or an English language deficiency, Reading & Radio Resource will “read” for you.

Recently the 41 year-old Dallas organization created an Audio Recordings Seed Library of textbooks, literature, newspapers, magazines, and other printed materials for the Dallas Catholic Diocesan Schools, using funding from a Catholic Foundation grant of \$7,600.

Library “a great educational resource,” It should be noted that the tapes can be duplicated free of charge, and distributed to any Catholic school in the Diocese.

Betty Hersey, Executive Director of Reading & Radio Resource estimates that of the 15,000 children enrolled in Diocesan schools, as many as 3,000 could benefit from the recordings. “I know audio recordings help children do better in school, and keep them from dropping out,” she says. “Teachers tell us the audio materials help students participate in class and better understand the material.”

In addition to recordings for school children, Reading & Radio Resource records books



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one provided scholarship funds before his tragic death in a traffic accident at age 11.

The scholarships will fund up to 50 percent of tuition costs in Diocesan Catholic elementary schools. The donors hope to raise a total of \$2 million over the next two years from others who share their generous vision. Already, in addition to their contribution, they have enlisted the support of the Mexican actor Alberto Mayagoitia, who offered two fundraising performances of his one-man show *Mi Cristo Roto* at the Cathedral Shrine of the Virgin Guadalupe. Donations to the Jethsuby Scholarship Fund of the Catholic Foundation can be made by any other interested individuals or families directly to the Foundation, 5310 Harvest Hill Rd., #248, Dallas, TX 75230, or online at [www.catholicfoundation.com](http://www.catholicfoundation.com).

According to Bishop Kevin J. Farrell, approximately 24 percent of the 15,000 students in Catholic diocesan and private Catholic schools are Hispanic. The number would probably be higher, he said, if financial assistance were available for more families, and he welcomed the Delgados’ commitment to this new scholarship. “We know there is a need.”

The Catholic Foundation currently manages 17 scholarship funds established by private donors, works with the donors to establish specific criteria for the awards, administers the application and grants process, and handles reporting and distribution requirements.

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*“To help children do better in school, especially those children who need the most help.”*

BOB BAILLARGEON, FOUNDATION TRUSTEE

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In his recommendation, former Foundation Trustee Bob Baillargeon, noted the grant is intended “to help children do better in school, especially those children who need the most help.”

Sister Dawn Achs of the Catholic Schools of Dallas office, with principals and teachers, assisted in the selection of materials to be taped by the agency’s volunteers, and maintains the master library of recordings on cassette tapes and/or MP3 CD’s. Calling the new

and other printed materials for adults, and operates a radio reading service, Station NTRB. Volunteer readers annually donate approximately 16,000 hours and record more than 200 books a year.

## DELGADOS CREATE JETHSUBY SCHOLARSHIP

“We know what a Catholic education did for our children and we would like to help provide that same opportunity for others.”

With this clear-sighted intent, on March 15 Dr. Mauricio Delgado, a pediatric neurologist, and his wife, Maria, established a new scholarship fund through The Catholic Foundation to help children of the Hispanic community better afford a Catholic school education.

The Delgados named their scholarship fund to honor the memory of a bright young boy named Jethsuby whom they believed would have benefited from Catholic school, had his mother been able to afford it – or had some-

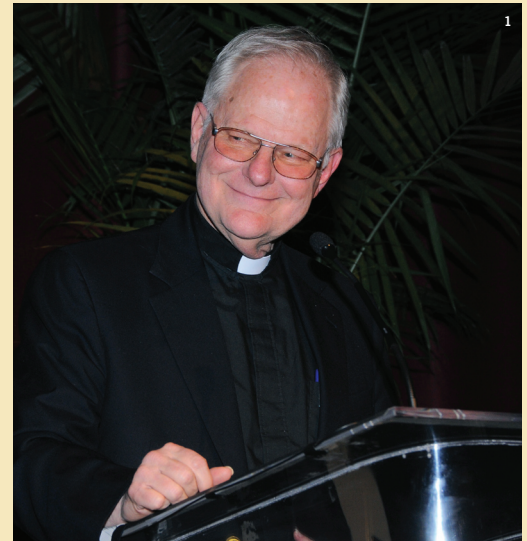


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# THE CATHOLIC FOUNDATION ANNUAL AWARD DINNER

February 5, 2010

A sell-out crowd celebrated the 28th Annual Catholic Foundation Award Dinner Friday, February 5 in the Intercontinental Hotel. The 2010 Catholic Foundation Award honoree, The Rev. Philip S. Postell, S.J., was the subject of a video in which his siblings (“Mom always loved him best”), students, teachers, parents, and priest colleagues shared their admiration, appreciation and love of a unique “Man for Others” and his exemplary service to the Catholic community these past 18 years as President of Jesuit College Preparatory School. His greatness, noted Mike Ersing, Jesuit’s Principal, “stems from his ability to share the blessings God has given him with others.” And in his brief acceptance speech, Father Postell called all those in attendance to do the same – to act compassionately, so as to provide hope in the face of despair. “Each of us,” he said, has his or her important part to play. Nothing – no one – is insignificant.”



1. Father Philip S. Postell Acceptance Remarks

2. Grant Presentation for the Jesuit Refugee Service/ USA Aid to Haiti. Accepting the award is Chuck Vinson, Vice President of Institutional Advancement, Jesuit College Prep from Robin P. Hartmann, Chairman of Board of Trustees The Catholic Foundation

3. Dinner Chairmen, Neil and Pat O'Brien greet Bishop Kevin J. Farrell

4. Mary and Mike Terry with Father Philip S. Postell. Mike gave a tribute to Father Postell during the program 8. Monsignor Henry Petter plays “When the Saints Come Marching In” on his harmonica

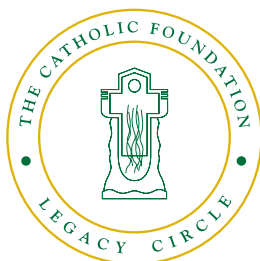
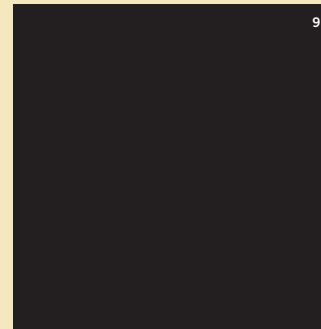
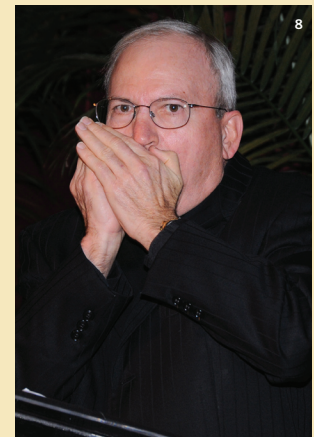
5. Catholic Foundation Scholar, Sebastian Raul Saldivar

6. Charles “Chick” Young Introducing Father Postell

7. Father Philip S. Postell receives the 2010 Catholic Foundation Award from Robin P. Hartmann, Chairman of Board of Trustees and Ed Schaffler, President and CEO of The Catholic Foundation

8. Monsignor Henry Petter plays “When the Saints Come Marching In” on his harmonica

9.



## FOUNDATION CREATES LEGACY CIRCLE

The Foundation is pleased to announce the creation of The Catholic Foundation Legacy Circle to honor those donors who have made long-term commitments to the Foundation through planned gifts such as bequests and/or charitable trusts.

In addition, the donors who have established a fund at the Foundation that is either permanent or ultimately benefits the Foundation’s Unrestricted Fund, or have used the Foundation’s resources to develop some other type of planned charitable gift will also be part of the Legacy Circle.

Members will be welcomed at a special celebration and, with permission, their names will be published as an example to the Catholic community of the opportunity to include the Foundation in their philanthropic and estate planning and to inspire their participation.

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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:

**The Catholic Foundation**  
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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](http://www.catholicfoundation.com)



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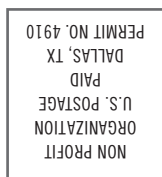
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