

# THE Good Word

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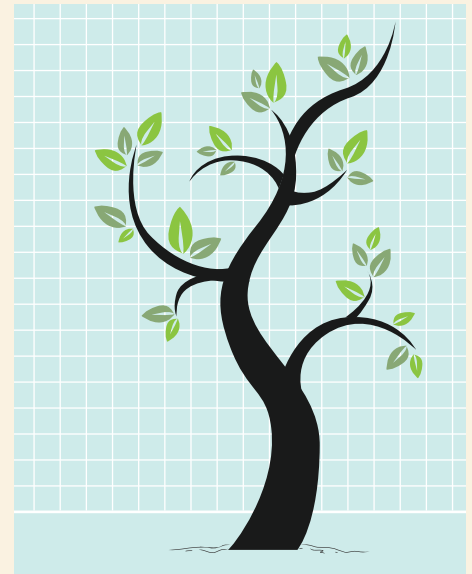
## Foundation Has Strong Year-End

When a student enrolls with a scholarship to a Catholic school, when an indigent senior receives assistance at a local agency, or when underprivileged children attend cultural events they wouldn't otherwise be able to enjoy, those experiences often wouldn't be possible if it were not for the generosity of many charitable minded donors with funds at The Catholic Foundation.

Last year's outcomes were particularly outstanding. A 2012 performance summary presented recently by Thomas W. Codd, Jr., chairman of the board of trustees, to the Foundation's Advisory Council showed donor contributions of \$8.5 million, compared with \$5.8 million in 2011. Investment returns in 2012 totaled 12.5 percent. With 356 funds and charitable trusts and over \$140 million under management, last year the Foundation awarded \$4.7 million in grants to religious, educational and charitable programs and associations in the Diocese of Dallas and beyond.

"As with any year, 2012's accomplishments began with generous donors who entrusted The Catholic Foundation with their gifts," said Codd. "The Foundation strives to offer our donors the finest professional assistance and expert management of funds to help them address the causes they care about in the Catholic community. We believe the 46 percent increase in gifts to the Foundation over the previous year indicates that our donors' trust is well placed."

Last year's stellar performance can be attributed to several other factors, according to Vicky Lattner, chair of the Development Committee. "Hard work by the Foundation staff and a rebounding stock market played a big part," she said. "And the last quarter was especially good because of the uncertainty about tax law as the new year approached. Some donors chose to contribute appreciated securities and other gifts in order to take the tax deduction in 2012."



At the heart of it all is the desire of our donors to help others. For more than 57 years, The Catholic Foundation has helped donors fulfill their philanthropic vision utilizing state-of-the-art giving vehicles and personal service. 2013 brings a new year and new challenges in our Catholic community. How can we help you?



### THE PRESIDENT'S LETTER

Baptism by fire! That describes my first few months here at The Catholic Foundation. In that time I have had the pleasure of meeting with many of our donors, grant recipients, board trustees, advisory council members and many future donors to the Foundation. I'm encouraged to see how supportive everyone is of our Catholic community.

When I visit schools, parishes and charitable organizations within the Dallas diocese, I'm awestruck by the work that has been accomplished over the years in the name of The Catholic Foundation. The credit truly belongs to our generous donors who entrusted The Catholic Foundation to carry out their charitable giving intentions.

I believe our greatest opportunity is to continue to provide meaningful education and guidance to potential donors, parishes and schools on how The Catholic Foundation can be a valuable partner to each of you as you contemplate your current and planned giving. The process sounds simple on the surface, but it can be very complex—as I've learned the past few months. But if you rely on the subject matter experts at The Catholic Foundation, they can help you navigate what otherwise can be an intimidating or even overwhelming process. I know—Kris and I set up a family fund in early January this year, and the staff at the Foundation was great!

As the needs of our community grow, I look forward to working with you to grow the Foundation to address those needs. Feel free to call us or stop by and visit us. In the meantime, please join me in prayer for the success of our Catholic community and our country.

J. MATTHEW KRAMER

A handwritten signature in black ink that reads "J. Matthew Kramer".

# A Strong FOUNDATION

## IN MEMORIAM: *Joseph Kern*



Joseph Kern, a former trustee of The Catholic Foundation who served as chairman of the board

of trustees from 1978 to 1979, passed away in late February. He was an entrepreneur, industry leader and active member of the Catholic community.

A native of Boston, Kern graduated from the University of Alabama and later served in both the U.S. Navy and the U.S. Army. In 1954, he started his business career with Owens-Corning Fiberglass Corp. in sales and marketing in the Southwest. Six years later, he founded his

own company, Rosco, Inc., where he converted incombustible drapery fabrics for office buildings. He later expanded to the commercial wall covering market and served as president of two national wall covering associations.

Among his community activities, Kern served as president of the Greenway Parks Home Owners Association and president of the Preston Trail Golf Club. He was a Knight of Malta and a

member of Christ the King Catholic Church.

Gene Vilfordi, a former trustee of The Catholic Foundation, remembers Kern. "Joe was a visionary leader and a generous man who combined his talent for financial matters with a deep concern for the marginalized - the sick and the poor. He was an exemplary Catholic gentleman who practiced and defended the faith and left us all richer for having known him."

## BOARD WELCOMES TRUSTEES AND NEW CHAIRMAN

Three new trustees have been named to three-year terms on the Board of Trustees of The Catholic Foundation. Robert Berg, Alfredo Duarte and Vince Hess previously served on the Advisory Council. In addition, Thomas W. Codd, Jr. will serve as chairman of the Board.

Robert Berg, senior vice president and director of corporate services with Carter Financial Management, is past president and chairman of the board of the Dallas/Fort Worth Chapter of the International Association for Financial Planning and former board member of the Dallas Chapter of the Institute for Certified Financial Planners. He has held volunteer leadership positions with the Children's Oral Health Foundation of Dallas, the YMCA and the North Dallas/Park Cities Kiwanis Club. A member of St. Mark the Evangelist Parish, Berg also serves as a member of the Dallas Diocesan Education Endowment Trust.

Alfredo Duarte is president and founder of Taxco Produce Inc., a food service distributor, a counselor and founder of Consejo Promexico and a counselor of Nafinsa in Texas. His work has earned him the 2004 Award for the U.S. Mexican Businessman of the Year, the 2011 Immigrant of the Year Award by Dallas Communities, and the 2005 International Award of Yacatecutli for contributing to the growth of commercial relations between Mexico and the United States. Duarte is a



Pictured from Left: Matt Kramer, Foundation president and CEO, joins new trustees Robert Berg, Vince Hess and Alfredo Duarte, along with Thomas W. Codd, Jr., chair of The Catholic Foundation. Berg, Hess and Duarte are the newest members of the Foundation's 2013 Board of Trustees and will each serve a three-year term, which began on January 1, 2013.

member of Nuestra Señora Del Pilar Catholic Church and also is active in St. Cecelia Catholic Parish.

Vince Hess, a partner in the law firm of Locke Lord Bissell and Liddell LLP, is a Fellow in the Texas Bar Association and the Dallas Bar Association and a Life Founding Fellow in the Dallas Association of Young Lawyers Foundation. He is a past president of the Dallas Chapter of the St. Thomas More Society as well as past secretary, treasurer and director of the Dallas Association of Young Lawyers. Hess is a member of St. Pius X Catholic Church, serves as vice chair of the Bishop Lynch High School Board and is a member of Legatus.

Thomas W. Codd, Jr. is North Texas managing partner of PricewaterhouseCoopers LLP. He joined The Catholic Foundation's board in 2008 and previously chaired the Distribution Committee. He is a director of the American Ireland Fund, a member of the North American Advisory Board of the UCD Michael Smurfit Graduate Business School and a member of the New York City Friendly Sons of St. Patrick. Codd also serves on the boards of the World Affairs Council of Dallas/Fort Worth, the Dallas Theater Center, the University of Dallas and the Dallas Zoological Society. He is a member of St. Rita Parish.

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# Giving SPIRIT



## Giving 101

by Cheryl Unis Mansour, Vice President of Development

### IRA ROLLOVERS

Did you know you can reduce your taxes for 2013 by making a gift from your IRA to charity? Early this year, when Congress reached the “fiscal cliff” deal, it also extended a provision popular with taxpayers and charities. The Taxpayer Relief Act of 2012 resurrected the IRA charitable rollover that had expired at the end of 2011.

The IRA charitable rollover allows investors 70½ 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.

It’s no surprise that the IRA rollover has the enthusiastic support of charitable organizations, including The Catholic Foundation. Donors like the flexibility it offers by allowing them to avoid income taxes on their required minimum distributions and at the same time support worthy causes. Through a community foundation such as The Catholic Foundation, donors of an IRA have several options to support charitable causes in which

they believe. It is a unique opportunity to create an endowment to benefit the community through charitable giving vehicles such as a Designated Fund that, for example, supports students through education, or a Field of Interest Fund for causes close to a donor’s heart. Charitable gifts from IRAs may not be made to donor advised funds or private foundations.

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

### Donor Profile: DALE WALSH



Gail and Dale Walsh

For a man who claims to be “80 percent retired,” Dale Walsh is extremely busy. *The Good Word* caught up with him by phone recently while he was in Puerto Rico to oversee a wireless communications installation by a company he co-founded in 2006.

Walsh, who grew up in Kansas, has been in communications ever since he served in the U.S. Army. As two-way communications eventually led to a career in wireless communications, he worked in several locations in Oklahoma, Kansas and Louisiana before settling in Irving. Along with

partners, he bought or started several companies. Now he’s chief operations officer for InSite Wireless Group. He and his wife, Gail, reared four children and now enjoy their grandchildren and great-grandchildren.

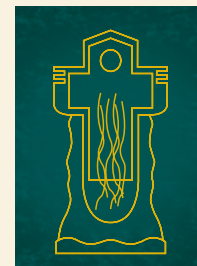
A member of Holy Family of Nazareth Church, Walsh is passionate about Catholic education. When he wanted to make several charitable gifts to support Catholic schools and other causes, he turned to The Catholic Foundation. Working with Michael George, senior development officer, he established a designated fund to benefit organizations such as the Low Birth Weight Development Center, St. Jude’s Children’s Hospital, The Catholic Foundation, Holy Family of Nazareth Church and School, Holy Trinity Seminary, Catholic Charities, and Irving Cares, a United Way agency.

Walsh made the gift through a charitable IRA rollover, which allows a donor 70½ or older to transfer as much as \$100,000 a year from an individual retirement account directly to a qualified charity while excluding the transfer from gross income.

“I liked working with the Foundation on the charitable rollover,” Walsh says. “It was a simple way to accomplish what I wanted to do – support the organizations I care about as well as meet the regulations of the IRS and

avoid income taxes on my required minimum distributions. I appreciate knowing the Foundation is doing a good job of managing the fund so it will be able to produce good results over the long term.” 🐟

### CALL FOR NOMINATIONS



The Catholic Foundation Award is recognized as the preeminent and most recognized annual award given to an outstanding member of the Dallas Catholic

community. Each recipient is selected for their distinguished service to the religious, charitable, and evangelical needs of the Diocese of Dallas. The award will be presented at The Catholic Foundation Award Dinner on February 7, 2014. To participate in the nomination process, visit [www.catholicfoundation.com/tcf\\_award\\_nomination](http://www.catholicfoundation.com/tcf_award_nomination). Nominations must be received by Friday, June 21, 2013.

# A LIGHT On

## 2013 SPRING GRANT DISTRIBUTION



Holy Family of Nazareth School received grant assistance for technology and tuition assistance.

With assistance from \$687,559 in grants announced by The Catholic Foundation this spring, 21 Dallas-area schools, churches and organizations will be able to expand programs, enhance technology, renovate or construct facilities, replace equipment, and assist students with tuition.

The grants were made from the Foundation's Unrestricted Endowment Fund and from funds designated for support of religious, educational and charitable programs and associations in the Diocese of Dallas. They were made possible by gifts from Foundation donors, past and present, in support of the mission to serve the needs of the entire Catholic community.

Many of the awards will enable Catholic schools to construct, repair or renovate facilities. Holy Family Quasi-Parish in Van Alstyne will begin a major renovation and expansion, St. Bernard of Clairvaux Church in Dallas will undergo extensive roof repairs, and St. Joseph Catholic Church in Commerce will expand its parking lot. The Discalced Carmelite Monastery in Oak Cliff will partially replace its driveway and reseal the asphalt parking area.

Other grants will help Mary Immaculate Catholic School install a camera and security system and replace doors and windows in the kindergarten wing; and the

Catholic Campus Ministry at Southern Methodist University will update the Neuhoff Catholic Student Community Center. Our Lady of the Lake Church in Rockwall will install electronic access door locks and surveillance cameras, and St. Paul the Apostle School will update its electrical system.

Several schools, including Holy Family of Nazareth School, St. Philip the Apostle Catholic School and St. Augustine Catholic School, will use funds to enhance technology. The Notre Dame School of Dallas will purchase laptops for teachers, Prince of Peace Catholic School will acquire interactive technology, and St. Joseph Catholic School in Richardson will buy Smart Boards and iPads.

Three schools will use grants to provide tuition assistance with funds from the Louise Buhrer Endowment Fund, Dorothy Irving Memorial Fund and the O'Connell-Schulze Fund: Holy Family of Nazareth School, Bishop Dunne Catholic School and St. Philip the Apostle Catholic School.

Still other awards will support professional development for teachers at Ursuline Academy, the Zero to Five Funders' Collaborative "Together We Learn" Program, and operating expenses at the Catholic Crisis Pregnancy Center (BirthChoice). A grant to the Perot Museum of Nature & Science will support science

programs in 15 Catholic schools, and the Cathedral Shrine of the Virgin of Guadalupe will use funding for promotional and development materials. Big Thought, which seeks to stimulate imagination and creativity, will enrich programming in five Diocesan elementary schools.

"As we celebrate the spring grants and the projects they will fund, we honor the generous donors to The Catholic Foundation who made the grants possible," says Matt Kramer, president and CEO of The Catholic Foundation. "Their gifts will make a profound difference in the lives of young people served by these organizations." 🐟

## BOARD WELCOMES TRUSTEES AND NEW CHAIRMAN

*(continued from page 2)*

"The leadership that makes up The Catholic Foundation's board of trustees enriches this organization with extensive expertise in a variety of relevant industries," said Matt Kramer, president and CEO of the Foundation. "We welcome our new trustees and thank them for providing us with their leadership and experience so that the Foundation may continue to grow and prosper."

Other Board officers through 2013 are Jennifer Staubach Gates, vice chair; Walter Adams, chair of the Investment Committee; David M. Rosenberg, secretary; Vicky Lattner, chair of the Development Committee; Joseph C. Murphy, chair of the Audit and Administration Committee; and Raul Estrada, chair of the Distribution Committee. 🐟

# THE CATHOLIC FOUNDATION ANNUAL AWARD DINNER

January 18, 2013

1. Bob Baillargeon (right) accepts the 31st Annual Catholic Foundation award from Matt Kramer and Tom Merkel, former Chairman of the Board of Trustees.



2. The Catholic Foundation Scholars Award was awarded to Faith Noah of Ursuline Academy.

3. The Catholic Foundation Award honoree, Bob Baillargeon (center) celebrated the special evening with his family and many close friends from the Catholic community in Dallas.



4. Tom Merkel presents The Catholic Foundation Award Grant to Monsignor Michael Olson, Rector of Holy Trinity Seminary.



## CALL FOR ENTRIES CATHOLIC FOUNDATION PLAZA ART COMPETITION



All professional artists living in Texas are eligible to enter the eighth annual Catholic Foundation Plaza Arts Competition. Beginning in October, 2013 the winning work will be displayed in the Catholic Foundation Plaza, located on the grounds of the historical Cathedral Shrine of the Virgin of Guadalupe, for approximately one year. The winner will receive a \$2,500 stipend. Deadline for entries is Thursday, August 29, 2013, at 3 p.m.

For more information and an entry form, please visit [www.catholicfoundation.com](http://www.catholicfoundation.com)

## 2013 Annual ADVISORY COUNCIL MEETING

Richard Fisher, president and CEO of the Federal Reserve Bank of Dallas addressed The Catholic Foundation Advisory Council Meeting on April 2, 2013, at the Federal Reserve Bank of Dallas, and spoke to the crowd of Advisory Council members and Trustees about the state of the economy in Texas compared to the rest of the country. In his role, Fisher serves as a member of the Federal Open Market Committee, the Federal Reserve's principal monetary policymaking group.



Richard Fisher

The Advisory Council is a group of individuals recognized for their contributions to the Catholic community and adds to the expertise available to the Foundation.

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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**  
5310 Harvest Hill Rd., #248  
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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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