

THE Good Word

VISIT OUR WEBSITE: www.catholicfoundation.com

An Impactful Year End as Donors Create Legacies Through Planned Giving

As The Catholic Foundation Board of Trustees reviewed the 2013 year end report they were pleased with the Foundation's progress. Through gifts and bequests, the Foundation opened more new funds than in any other year since 1994. Donors' generosity brought Foundation assets to approximately \$180 million and membership in the Legacy Circle – honoring those who've established planned gifts – grew to 150.

Charitable gifts will enable area Catholic schools to renovate and modernize, more students will receive tuition assistance, and various Catholic organizations will pursue their missions to improve lives in the Dallas area. The Foundation awarded \$6.2 million in grants last year, including \$1.3 from

the unrestricted Philanthropy Fund and \$4.9 million from restricted and donor advised funds.

Clear messaging and increased visibility contributed to last year's success, said J. Matthew Kramer, president and CEO of The Catholic Foundation. "We want to continue to educate people about using The Catholic Foundation as a conduit of giving. It enhances their gift as investment residuals are allocated to our unrestricted Philanthropy Fund, which goes out directly to the community through grants."

The Foundation's approach to 2014 is to keep the momentum going, particularly by encouraging donors and potential donors to count on The Catholic Foundation as a way to create legacies through planned giving. Those who have

been donating through current gifts may want to consider establishing a charitable trust or include the Foundation in their wills. Giving in this way means that a donor's generosity will continue after their lifetime, allowing the Foundation to respond to the needs of our community.

For more details about charitable giving and how The Catholic Foundation will have an impact on the community, go to www.catholicfoundation.com.



THE PRESIDENT'S LETTER

Inspiring! The word used most frequently to describe the 32nd Annual Catholic Foundation Award dinner on February 7, 2014. Mary and Mike Terry – their humility, their generosity, their story....inspiring. Phong Nguyen – the 2014 Scholar Award recipient, his story, his faith, his presence....inspiring. Our current and former Trustees of The Catholic Foundation – their commitment of time, talent, treasure to make a difference in our community....inspiring.

The message of inspiration is echoed by our generous donors who contributed to a record year in 2013 for the Foundation in several areas; overall donations to the Foundation, grants made into our community and number of new donor funds established. If the first two months of

2014 are an indicator of what to expect for the entire year, 2014 will be another great year of growth for our Foundation.

Established in 1955, The Catholic Foundation's primary purpose was to create an unrestricted endowment fund to address the emerging needs of the Dallas diocese. That vision was valid in 1955 just as it is in 2014. During the past 38 years our Foundation has granted more than \$80 million from our unrestricted and restricted funds. What impact will The Catholic Foundation make in the Diocese of Dallas 20 years from now? That's the exciting part. We welcome everyone to learn more about the Foundation and how we can work together to create a bright future. Be inspiring!

J. MATTHEW KRAMER

A Strong FOUNDATION

THE FOUNDATION BOARD WELCOMES NEW MEMBERS

Three new trustees have been named to three-year terms on the Board of Trustees of The Catholic Foundation. As trustees, G. Marc Lyons, Vernon R. Mullen and James S. Ryan III will set policy, establish direction and oversee the professional management of the organization.



G. Marc Lyons

Lyons, principal and president of Cardinal Midstream, has more than 35 years in the natural gas industry, serving as executive vice president, vice president of business development and vice president of marketing for several companies. He attended Nicholls State University and Harvard University's Graduate School of Business Program for management development. Lyons and his family are members of All Saints Catholic Church.



Vernon R. Mullen

Mullen serves as vice president of human resources at Billingsley Company. He has more than 38 years of experience in human resources and fair employment practices, working as assistant vice president for the office of equal opportunity at UT Southwestern Medical Center, executive vice president of human resources at the Crow family's Dallas Market Center, and in various human relations roles at Johnson & Johnson Medical Products, Inc. Vernon holds a bachelor of science degree in accounting from Xavier

University and attended graduate school at the University of Texas at Dallas and the University of Texas at Arlington. He and his family are members of St. Elizabeth of Hungary parish.



James S. Ryan III

James S. Ryan III is an experienced transactional lawyer for Jackson Walker, L.L.P. with a strong history of success and community involvement. He was named "Super Lawyer" by Thomson Reuters (2003-2013) and a "Best Lawyer in Dallas" by D Magazine. Jim and his family attend St. Thomas Aquinas Catholic Church. He serves on the Blue Ribbon Committee, charged with developing the strategic plan for the Catholic Schools of the Diocese of Dallas.

Tom Codd, who continues as chairman of the board, welcomed our new board members. "We thank Marc, Jim and Vernon for accepting this commitment to lead The Catholic Foundation in our support of the Dallas Catholic community," he said. "Each brings energy and a unique background and life experiences that will help us promote philanthropy to make support of our community possible."

Other Board officers through 2014 are Vicky Lattner, vice chair; Dan Cruse, secretary; Win Bell, chair of the Audit and Administration Committee; Jim Burke, chair of the Development Committee; John Landon, chair of the Distribution Committee; Bob Berg, chair of the Investment Committee; and Lisa Dickson, chair of the Governance Committee. 🌟

New Advisory Council Members

The Catholic Foundation is pleased to welcome the following new members to the Advisory Council:

- **Dr. David Alameel** – St. Rita Parish, President, Alameel Holdings
- **Al Cardenas, M.D.** – St. Gabriel the Archangel Parish, Republic Emergency Services
- **Joseph M. Coleman** – Prince of Peace Parish, Kane Russell Coleman Logan PC
- **Thomas E. Merkel** (former Board Chairman) – Christ the King Parish, Sr. Vice President, Merrill Lynch & Co.,
- **Scott Moore** – St. Thomas Aquinas Parish, PriceWaterhouseCoopers
- **Thomas W. Reidy** – St. Gabriel the Archangel Parish, Avalon Consulting, LLC
- **April B. Slovensky** – St. Thomas Aquinas Parish, Deloitte Consulting LLP
- **Michael J. Uhl** – St. Rita Parish, Fitzpatrick Hagood Smith & Uhl LP

The volunteer Advisory Council is composed of individuals recognized for their leadership and contributions to the Catholic community. Nominated by the Board of Trustees, Advisory Council members serve to increase the visibility and reputation of The Catholic Foundation in the community and add to the expertise available to the Foundation.

SPECIAL THANKS TO 2014 DINNER COMMITTEE

The Catholic Foundation owes special thanks to the 2014 Dinner Committee for helping to achieve a record attendance of 1,340. In six weeks, the committee, chaired by Marianne and Roger Staubach, secured a commitment for over 120 tables. "None of this would have been possible without the leadership of Marianne and Roger," said Matt Kramer, president, The Catholic Foundation. "As a former trustee,

Marianne has been a friend of the Foundation, and the family has always gone above and beyond to support our mission."

Committee members included Mary Emma Ackels-Karam, Michelle and Richard Anderson, Colleen and Robert Baillargeon, Edwin S. Bell, Jr., Denny Beran, Robert H. Berg, Linda and Dale Booth, Matthew Bowen, Jim Burke, Karen M. Carney, Shelly and Thomas Codd, Joseph M.

Coleman, Lou Ann and Michael Corboy, Ann and Walter Coughlin, O. D. (Dan) Cruse, Jr., and Carolyn and Harry (Buzz) Crutcher.

And Irma and Alfredo Duarte, Carmen and Raul Estrada, Gregory J. Fisher, Louise and Hulen Ford, Robert M. Galecke, Barbara and Ed Garahan, Ellen and John Grimes, G. Michael Gruber, Maureen and Joe Hafertepe,

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Giving SPIRIT



Giving 101

by Cheryl Unis Mansour, Vice President of Development

LIFETIME CHARITABLE GIFTS OF RETIREMENT ASSETS

Americans hold trillions of dollars in their retirement accounts, representing 34 percent of all household financial assets. That figure from the Investment Company Institute explains why many donors turn to their retirement funds to make charitable gifts.

The upcoming issue of *The Good Advisor* takes a look at various ways donors can use retirement assets to benefit charitable causes dear to them as well as minimize income

taxes. This publication, which is provided by The Catholic Foundation to Dallas-area professional advisors and available at www.catholicfoundation.com, contains a number of options to consider:

- By transferring an IRA to a charity, the charity receives the full value of the asset. The same asset bequeathed to children would be taxed at the standard income and estate tax rates if the children elected to cash out the IRA.
- Donating highly appreciated stock in an employer stock ownership plan can minimize capital gains tax to the donor

as well as maximizing the charitable tax deduction.

- Investors born before 1936 who meet certain criteria and donate a lump-sum distribution to charity may take advantage of 10-year forward averaging to pay income tax on the distribution.

Another option includes integrating capital gains with retirement distributions.

To learn more about tax-smart ways to support charity using your retirement funds, please consult your financial advisor or call The Catholic Foundation at 972-661-9792.

Donor Profile:

JIM & CATHIE SHIELDS

Jim Shields was born and raised a Catholic – a lifelong member of the faith and graduate of Jesuit College Preparatory School, now attending Prince of Peace Parish. When an inheritance from Jim's mother several years ago led the couple to think about their philanthropy, The Catholic Foundation was a natural place to turn.

"Through our church, we were friends with people who were associated with The Catholic Foundation," Cathie said. "When we decided to establish a donor advised fund, the Foundation was our first choice." Jim and Cathie wanted their charitable giving to honor the memory of his mother, Ruth Shields, whose Catholic faith included a strong sense of community service.

Jim is an attorney with more than 30 years of experience and principal of the Addison-based Shields Legal Group, while Cathie serves as office manager of the firm, which specializes in commercial business practice. They are approaching their donor



Jim and Cathie Shields and family

advised fund with the same strategic planning they use in their careers.

Currently Jim and Cathie are in the process of growing their fund in order to enhance its impact in the future. When they begin to recommend grants from the fund later on, both want to emphasize education, and Cathie particularly has an interest in early childhood education. Jim wants to encourage entrepreneurial spirit across all socioeconomic groups. "Nurturing nascent entrepreneurship is important," Cathie said. In both areas, they want to focus on the metropolitan community, awarding grants to locally based organizations.

"When we decided to establish a donor advised fund, the Foundation was our first choice."

Cathie Shields

Eventually, the Shieldses want to create a philanthropic legacy with their three sons, now ranging in age from late teens to mid-20s, serving as successor advisors to their fund. It will be a legacy begun as a way to honor Jim's mother, and, with their donor advised fund, carry her charitable spirit through to her grandchildren. 🐣

A LIGHT On

DONORS FULFILLING GRANTS TO PERSONAL CHARITABLE INTERESTS

In 2013, The Catholic Foundation distributed \$6.2 million in grants from both the unrestricted Philanthropy Fund, and a majority from restricted and donor advised funds. Nearly five million dollars in grants from restricted and donor advised funds were distributed to more than 880 different religious, educational and charitable organizations.

Perhaps the best word to describe a donor advised fund at The Catholic Foundation is *flexibility*. Contributions to a fund and distributions from a fund can be made at any time, in any amount. A donor advised fund can be especially useful when a donor might wish to benefit from a significant charitable tax deduction in a given year but wish to extend gifts to various charities over several years.

Other characteristics distinguish donor advised funds from grants made twice a year by the board of trustees from the unrestricted Philanthropy Fund, which tends to focus on the Diocese of Dallas and many Catholic organizations, particularly schools and churches. Grants recommended by donors from their donor advised funds can benefit local Catholic organizations, but many also support qualified secular nonprofits and can have a broader geographic focus. A donor advised grant may also be gifted anonymously if the donor requests to do so and may also be designated for a specific purpose requested and described by the donor.



HELPS International official: Team Dallas Medical O8, led by Dr. Steven and Mrs. Alicia Harris – helping install an ONIL stove.



CMMB amputee program: Families in Haiti receive much needed medical attention through an amputee program established by the Catholic Medical Mission Board.

Examples where donors give for a specific purpose:

- A grant was recommended to support the Catholic Medical Mission Board (CMMB), a 102-year-old, New York-based nonprofit dedicated to improving global health care for the world's poor. The grant targeted a program to aid Haitian amputees and a new effort called CHAMPS to address maternal and child death, disability and illness in Africa, Latin America and the Caribbean. Grants from the same donor advised fund also support the Boys & Girls Clubs of Collin County and *Catholic Answers Live*, a daily, two-hour radio program based in California and carried by Catholic stations across America.
- HELPS International, a Dallas-based organization committed to improving the lives of people in the developing world, particularly Guatemala, received several grants recommended from a donor advised fund. The grants have benefited medical missions, development of a high-yielding hybrid corn seed suitable for high altitudes, water purification systems, and a safe, efficient stove. Those same donors have recommended grants to Our Lady of the Lake Catholic Community near their summer home in Missouri, and to the Sheridan Carroll Food Pantry in Chicago.
- Still other donor advised funds at the Foundation provided support to organizations such as the Dallas Chapter of the Juvenile Diabetes Research Fund and Christian Community Action, a Lewisville nonprofit involved in nutrition, health care and education for the poor. Catholic organizations receiving grants recommended by donor advised funds include Franciscan

University in Steubenville, Ohio, St. Mary's Catholic Church in Gainesville, Texas, the Congregation of Divine Providence in San Antonio, Texas, and the Benedictine Sisters in Jonesborough, Arkansas, to name a few.

Channeling charitable donations through a donor advised fund is a convenient alternative to making gifts directly to individual organizations, according to one donor. "It's much easier to donate appreciated stock to The Catholic Foundation rather than giving stock to individual causes. The Foundation takes care of the administrative details."

At The Catholic Foundation our donors' individual interests and passions are very unique. We work with donors and their families to achieve individual philanthropic goals that, taken together, reflect the diverse generosity of the community and the rich variety of spiritual and financial gifts possible.

To learn more about how a donor advised fund could help you meet your charitable goals, please call The Catholic Foundation at 972-661-9792. 🐉

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Jane and Donald Hanratty, Vince Hess, Kasey and William Hollon, Kathleen Hoover, Albert Hrubetz, Julie and Francis Hubach, Judith and Gerard Jacob, and Kathleen Jenkins.

Also John R. Kraft, Walter N. Kuntz III, Vicky P. Lattner, Ann Letteer, Michael F. Maguire, Mary and Howard Manning, Megan and David Martinez, Linda and Thomas McCarthy, Nancy and Patrick McLochlin, Thomas E. Merkel, Regina Montoya, Brenda and Robert Morgan, Joseph C. Murphy, Joe O. Neuhoff, Jr., Carol Nicoud, Lydia H. Novakov, and Pat and Neil O'Brien.

And Scot W. O'Brien, Aileen Pratt, Peggy and Leonard Ruby, Edwin M. Schaffler, Deacon Denis G. Simon, Thomas A. Stanzel, Kelly and Chris Taylor, Mary Templeton, Wendy M. Traylor, Mary and Wade Vache, Frank Ventura, Eugene E. Vilfordi, Laura Fox Williamson, Mark Wischmeyer, David B. Woodyard, and Ana and James Yoder.

2014 ANNUAL AWARD DINNER HIGHLIGHTS



1. (From L to R) Joe and Kathy Murphy, Brad and Barbara Ann Camp, and Michael George, senior development officer for The Catholic Foundation.
2. (L to R) Dinner chairs, Roger and Marianne Staubach, City of Dallas Mayor Mike Rawlings and wife Micki, and Most Rev. Bishop Kevin J. Farrell.
3. The Catholic Foundation President and CEO, Matt Kramer, and Phong Nguyen, the 2014 Catholic Foundation scholar.
4. The Terry Family and friends
(Back row, L to R) Rev. Philip S. Postell, S.J., Dustin and Melissa Pridmore, Travis Terry, Kitty Jenkins, Jennifer Staubach Gates, John Gates, Michael Terry.
(Front row, L to R) Biddie Bradford, Mary Francis DeLoache, Mary and Mike Terry.
5. (From L to R) Chairman, The Catholic Foundation, Tom Codd; President & CEO, The Catholic Foundation, Matt Kramer; Most Rev. Bishop Kevin J. Farrell; Mary and Mike Terry.
6. Table hosts Leah and Jim Pasant (seated on far right) and their table guests.
7. First grade class from Santa Clara Academy singing at the 2014 Catholic Foundation Annual Award Dinner.



The Catholic Foundation's 2014 Annual Dinner set attendance records, with 1,340 people celebrating philanthropy at the 32nd annual event, held in February at the Hilton Anatole.

Mary and Mike Terry received The Catholic Foundation Award for their service to the community, particularly education and the homeless. The couple established the Mike & Mary Terry Family Foundation in 2006 and have partnered with The Catholic Foundation on several important initiatives. As recipients of the Catholic Foundation Award they join a group of

extraordinary community members who embody and live out their philanthropic goals for the betterment of our community.

"Tonight this award is about all of us in this room," said Mary Terry. "We are all working toward the common goals of providing education, assistance and opportunity in our community, specifically in our Catholic community. We are all in this together and celebrate the impact of our combined efforts."

The event featured a special performance by the Santa Clara Academy first grade class that Mary and Mike Terry have adopted and

have agreed to help with tuition assistance through the eighth grade.

In addition, Phong Nguyen, a Cistercian Preparatory School student, received The Catholic Foundation Scholar Award and a scholarship for his senior year of high school. In an essay, Phong related how his Catholic education has allowed him to push his academic limits, as well as nurture the faith that is his family's foundation.

The Union Gospel Performance Choir closed the evening with an uplifting medley of spiritual music.

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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
Dallas, TX 75230

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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