

THE Good Word

VISIT OUR WEBSITE: www.catholicfoundation.com

A Warm Welcome for The Most Reverend Edward J. Burns

The Catholic Foundation hosted a luncheon and community reception to welcome The Most Reverend Edward J. Burns as the eighth Bishop of the Diocese of Dallas on February 9, 2017. He had previously been serving as Bishop of the Diocese of Juneau, Alaska since 2009. In addition to his active involvement with a long list of notable committees and organizations, Bishop Burns travels widely as a speaker and facilitator and has been a frequent presenter at convocations, conventions and retreats nationwide.

We are very much looking forward to working with our newest member of the Board of Trustees, welcome Bishop Burns!



1. People form a receiving line for a chance to greet Bishop Edward J. Burns during a reception hosted by The Catholic Foundation at the Morton H. Meyerson Symphony Center following his Installation Mass at the Cathedral Shrine of the Virgin of Guadalupe on Feb. 9. (photo credit: The Texas Catholic)
2. Kevin Cardinal Farrell and Bishop Burns
3. L to R: The Most Reverend Christophe Louis Yves Georges Pierre - The Apostolic Nuncio to the United States, His Eminence Donald Cardinal Wuerl, The Most Reverend Edward J. Burns, His Eminence Daniel Cardinal DiNardo and His Eminence Kevin Cardinal Farrell



THE PRESIDENT'S LETTER

Donors are making double the impact at The Catholic Foundation! Because of your generosity in 2016, the Foundation processed 1600 grants totaling more than \$18 million to 560 unique organizations that address the educational, religious and charitable needs in the communities we serve. Because you, the donor, have entrusted us to administer your current charitable giving, we are able to invest your resources and grow our unrestricted Philanthropy Fund, from which we award grants into our Catholic community. Whereas other commercial gift funds keep those profits, we instead grant this money back out into the local community – doubling the impact of your resources.

These spring and fall grants included major construction projects: Cristo Rey Dallas, Good Shepherd Church in Garland, St. Joseph's Church in Waxahachie and Cardinal Farrell Hall at the University of Dallas. Roofs were replaced at Holy Cross Church, St. Mary's in Sherman, Our Lady of Lourdes and St. Elizabeth of Hungary, and new security systems, HVAC systems and technology were installed at other deserving organizations.

Grants from individual endowments helped fund a new foyer at St. Joseph's Residence, helped support the Brady Center for seniors and provided tuition assistance to 75 children for our local Catholic schools.

To our donors who have entrusted us with carrying out your charitable intentions now and after you have passed, thank you. We will continue to be good stewards of your resources now and in the future.

J. MATTHEW KRAMER

A Strong FOUNDATION

THANKS TO OUR OUTGOING TRUSTEE

The Catholic Foundation thanks Jim Burke, Executive Vice President and COO of Vistra Energy (parent company of TXU Energy and Luminant), who just completed six dedicated years of service to our Board of Trustees.

Jim is an active member of Christ the King Parish, serving as president of the Parish Finance Council. He is a graduate of Tulane University with a bachelor's degree in economics and an MBA in finance and is a licensed certified public accountant and a chartered financial analyst.

He served on The Catholic Foundation 2011-2013 Investment committee, 2011-2017 Distribution committee, 2014 Development Chair and Executive committee, 2015 Governance committee, 2016 Investment and Executive committee and served as Secretary for the Foundation.

Jim and his wife, Marti, started the Jim and Marti Burke Family Fund of The Catholic Foundation in 2014 and live in Dallas with their daughters, Megan and Sarah. 🐣



THE FOUNDATION BOARD WELCOMES NEW MEMBERS

The Catholic Foundation has named Kara Gehan and Mary Terry to its 2017 Board of Trustees. Each serving a three year term starting January 2017, the new trustees bring exemplary leadership, wisdom and dedication to the Board.

Kara Gehan, J.D. provides pro bono legal expertise to low-income families and individuals. She is a member of the Advisory Boards of The Catholic Center at Duke University and the Town North YMCA and the Board of Trustees for The Ursuline Academy of Dallas Foundation. Previously, Kara was a products liability litigation attorney at Hartline, Dacus, Dreyer & Kern, LLP as well as Strasburger & Price, LLP. She graduated from Ursuline Academy, earned her bachelor's degree at Duke University, and earned her law degree from The University of Texas at Austin. Kara, her husband Peter and their three

children are parishioners at St. Rita. Kara said, "I am honored to serve as a trustee of The Catholic Foundation. I am passionate about our Catholic schools, and it is especially gratifying to work with The Catholic Foundation to strengthen our schools so that as many children as possible can enjoy the benefits of a Catholic education."

Mary Terry and her husband Mike founded The Mike & Mary Terry Family Foundation in 2006, focused on providing equal opportunities for all children, advancing youth through education and ensuring a haven for those in need throughout North Texas. In addition to her work through the Foundation, Mary has served on the boards of the Jesuit Dallas Museum and Notre Dame School of Dallas. She attended Ursuline Academy and graduated from the University of North Texas with a degree in sociology. An active member

at St. Rita Catholic Parish, Mary has three children and four grandchildren.

"I am excited to become a part of this foundation that has impacted so many people and organizations in our Catholic community," says Mary. "Coming with a volunteer's perspective, I have seen how the grants coming from The Catholic Foundation have often been transforming, both to schools and community associations, as well as to the individuals who benefit from their many scholarships and grants."

Current Trustee **John Landon** took over as Chairman of the Board, as Vicky Lattner becomes immediate past chair after leading the Board for two years. Since 2011, John has served on and chaired several committees of the Board including Audit & Administration, Investments, Distribution, Governance and Executive committees.

He is the CEO and Chairman of Landon Development and Landon Homes, with more than 30 years of experience in the homebuilding and land development industry. John and his wife have four children and attend Prince of Peace Catholic Church.

Matt Kramer, president and CEO of The Catholic Foundation adds, "Under John Landon's leadership, I am confident our Board will help us grow the Foundation so that we may continue to greatly impact the community through the philanthropic dreams of our donors." 🐣



L to R: President and CEO Matt Kramer, with Kara Gehan, Mary Terry and John Landon

Giving SPIRIT



Giving 101

by Cheryl Unis Mansour, Vice President of Development

USING REAL ESTATE TO BUILD A CHARITABLE LEGACY

When we think of philanthropy most of us think “cash.” Yet there are other non-cash assets you can contribute to charity, and you may be surprised to learn that the property you no longer need might be an ideal asset to use in building a charitable legacy.

Are you considering downsizing? Are your parents moving to an assisted living facility or have passed away recently? Are you considering leaving your home to a charity like The Catholic Foundation? Personal residences are by far the most numerous real estate gift, even if not always the most

valuable types of real estate.

A gift of real estate can be beneficial to the donor when the property has significant long-term appreciation, especially when the donor would incur a sizable capital gains tax on selling. Under these circumstances, gifting your primary or secondary home may allow you to by-pass capital gains tax and deduct the fair market value of your gift, while removing a large taxable asset from your estate.

All real estate donations worth \$5,000 or more require the donor to provide:

- An outside appraisal by a qualified appraiser
- Title report
- Environmental assessment

The property must be marketable or income producing and carry no debt. It is the Foundation’s policy to liquidate real estate as soon as practical. Proceeds from the sale go into a charitable fund to support *your* charitable objectives.

If you would like to explore the possibility of donating your primary home, vacation home or other real estate to create a charitable fund at The Catholic Foundation please call us at 972-661-9792. We would be delighted to talk through the process with you and/or your professional advisor. 🐟

Donor Profile:

JOSIE TOOGOOD

Josephine Cowley Toogood, born in Great Britain in 1923, has had a fascinating, heroic and generous life. When she turned 21 years old, she joined the Women’s Auxiliary Air Force. Josie eventually became instrumental in the war effort as one of the earliest radar specialists tracking German fighters in their attack on Great Britain. She was manning the radar on D-Day from the White Cliffs of Dover.

Josie called herself a “war bride” because she married an American soldier, Chester Stanley, after a year-long courtship during which they saw each other for a total of 21 days. She had to wait until there was a spot on the SS Erickson ship so she could later move to a small west Texas town to share a home with her new husband and in-laws.

At just 39 years old, her husband Chester died of lung cancer when her children John and Anne were just 5 and 10 years old. Brave and courageous Josie, a single mother, with no driver’s license, no formal job history, no credit and only one thousand dollars cash in

her pocket, packed up their lives and moved to Dallas.

During these extremely challenging years, Josie was soon to understand giving and receiving generosity like never before. Despite living economically on the edge, her children never felt deprived and were nurtured by the Benedictine Sisters at St. Monica School, where Josie also volunteered.

Little did she know that she would soon meet and marry her second husband Ed Toogood, transforming her life and the lives of her children. She has continuously volunteered at St Monica’s Church and School, visited patients at the Veterans Hospital, and cared for friends, neighbors and family for over 40 years.

In 2016 Josie donated her home to the Foundation and the proceeds were used to establish The Josephine Fund of The Catholic Foundation. As advisors, her children and grandchildren will continue her legacy of generosity for many years to come. The philanthropic intention of the Fund is the support of causes and/or organizations that serve women, girls, and especially Catholic single mothers, a cause near and dear to Josie’s heart.



Josie Toogood (center) is surrounded by great granddaughters Keely and Emma and is joined by granddaughter Mandy and daughter Anne above.

Josie’s son, John Stanley, summarizes his first lesson of generosity from his mom, “Accept care from others with grace. Then take what little you have, make it available, it will be blessed, then give it away without expecting repayment and stand by for an abundance of awareness and relationships.” 🐟

A LIGHT On

CRISTO REY DALLAS COLLEGE PREPARATORY SCHOOL

Over \$208,000 in grants were awarded to Cristo Rey from both Catholic Foundation Donor Advised Funds and our general Philanthropy Fund in 2016. The funds will help aid the school with additional tuition assistance and purchase an entryway for their new building. Cristo Rey serves families from the Dallas area that could not otherwise afford a private Catholic education, and all students enrolled in the school participate in a unique corporate work-study program. The hands-on approach of each student working five full days a month in a professional work environment helps them to build work ethic skills that allow them to succeed both in college and in the modern workplace. 🐣



“Cristo Rey Dallas’ Corporate Work Study Program means our students can afford a Catholic college prep education by earning more than 60% of their cost of education with families contributing an average tuition of \$804 per year,” shared Kelby Woodard, President of Cristo Rey College Prep. “The partnership with The Catholic Foundation allows us to fill the remaining gap and provide opportunities for students like Mark and Vaneza to continue their Catholic education and grow stronger in faith and purpose. On behalf of our business partners, our families, and most importantly Mark and Vaneza...thank you.”

The 10th Annual Advisors Series

FOR ESTATE AND WEALTH MANAGEMENT PROFESSIONALS

The Catholic Foundation presented our 10th annual Advisors Series event on December 8, 2016 at the Belo Mansion featuring special guest speaker, Jonathan G. Blattmachr.

The most recent session, *Post-Election Perspective: “Daily Bread” Estate and Financial Planning for our Middle Tier Clients*, discussed the probable impact of the November presidential elections on Federal transfer and income tax planning for mid-tier individuals, estates and trusts. It discussed methods to enhance wealth for such individuals, estates and trusts, including methods to reduce income taxes. It also set forth the most efficient ways to acquire and hold life insurance as well as planning for the retirement benefits for such individuals.

Each year The Catholic Foundation presents a program to provide quality continuing education opportunities for our local professional advisor community. Outstanding professionals of national renown lead the

seminar and provide current information on many of the most pressing legal and financial considerations involved in wealth management and estate planning, including philanthropic considerations. Attendees received 2 hours of continuing education credit. Stay tuned, we will be announcing next year’s event details soon. Many thanks to our wonderful sponsors:



Guest speaker Jonathan G. Blattmachr at the 2016 Advisors Series at the Belo Mansion

PRESENTING

- Gardere Wynne Sewell LLP
- Carter Financial Management

PATRON

- Meadows, Collier, Reed, Cousins, Crouch & Ungerman, LLP
- Robert M. Bertino, Jr./UBS Private Wealth Management

SUPPORTING

- Bisignano Harrison Neuhoff LLP
- Frost Wealth Advisors
- Locke Lord LLP
- Thompson & Knight Foundation

FRIENDS

- Bessemer Trust
- CliftonLarsonAllen LLP
- Gruber Elrod Johansen Hail Shank LLP
- Jackson Walker LLP
- PlainsCapital Bank Wealth Management & Trust
- Shamrock Asset Management, LLC
- Armanino (Formerly TravisWolff)

2017 ANNUAL AWARD DINNER HIGHLIGHTS



1



2



3



4

More than 1,000 guests gathered to honor Jane and Don Hanratty at The Catholic Foundation's 35th Annual Award Dinner at the Hilton Anatole on Saturday, Feb. 11. The annual dinner recognized Jane and Don for their dedication, generosity and impact on the Catholic community and education in the Diocese of Dallas and beyond.

In recognition of Jane and Don, The Catholic Foundation awarded a \$10,000 grant to Notre Dame School of Dallas. The Foundation also presented a scholarship to Jathrine Martinez, a junior at The Highlands School, at the dinner.



1. Three generations of the Hanratty family.
2. Matt Kramer, President and CEO of The Catholic Foundation, and Jathrine Martinez, 2017 Catholic Foundation Scholar.
3. Roger and Marianne Staubach; The Most Reverend Edward J. Burns, Bishop of the Diocese of Dallas; and Jennifer and John Gates.
4. The Hanrattys were led into the ballroom by bagpipes played by Don Shannon.
5. Matt Kramer, President and CEO of The Catholic Foundation (far left), and John Landon, Chairman of The Catholic Foundation Board of Trustees (far right), present Jane and Don Hanratty (middle) with the 35th annual Catholic Foundation Award.
6. Most Rev. Gregory Kelly and Most Rev. Edward J. Burns.
7. Guests enjoying the cocktail reception before dinner at the 2017 Catholic Foundation Award Dinner on Feb. 11.
8. Dan and Lydia Novakov.



5



6



7



8

Board of Trustees

John R. Landon
Chairman

Victor Arias, Jr.
Win Bell
Robert H. Berg, CFP
Robert M. (Rob) Bertino, Jr.
Most Rev. Edward J. Burns
L. Bradley Camp
Javier Creixell
Alfredo Duarte
Kara Gehan

Monica Herrera, M.D.

Vince Hess
Kathy Hoover
G. Marc Lyons
J. Scott Moore
Joseph V. Popolo, Jr.
Aileen Pratt
James S. Ryan, III
Mary D. Terry
Robert W. Thoele
Michelle Vopni
Victoria P. Lattner
Immediate Past Chairman

Executive Staff

J. Matthew Kramer
President & CEO

Cheryl Unis Mansour
Vice President of Development

Carol P. McDonald, CPA
Chief Financial Officer

R. Michael George, CFRE
Senior Development Officer

Michael J. Murray, J.D.
Senior Development Officer

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
12222 Merit Drive, #850
Dallas, TX 75251
info@catholicfoundation.com

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



Advisory Council

Lydia Haggart Novakov
Chairman

Carol Atwell Ackels
Lawrence Ackels, Jr.
Dr. David Alameel
Thomas F. August
Glen A. Bellinger
Denny Beran
Santo Bisignano, Jr.
Fernando Blanco
Matthew Bowen
Jim Burnham
Regis W. Campfield
Al Cardenas, M.D.
Karen M. Carney
Luis D. Carrera
Raymond M. Chavez
Thomas W. Codd, Jr.*
Barbara J. Coffman

Joseph M. Coleman
Marlyn Conrow
Carolyn Crutcher
Kevin M. Curley
Levy Curry
Mary Jo Dean
John Doke
Charlie Fechtel
Gregory J. Fisher
Dan Flaherty
Amy Fox
George R. (Read) Frymire
John Grimes, Jr.
G. Michael Gruber
Michael D. Haddad
Charles M. Hansen, Jr.*
Robin P. Hartmann*
Rep. Will Hartnett
Joseph V. Hughes, Jr.
Bill Keffler

Margo Keyes
John B. Kiser
Walter N. (Nick) Kuntz III*
Joyce Lacerte
Leamon (Lee) Lafayette
Scotty Landry
Jerry Lastelick
Norma L. Longwell
Michael Lynch
Gail Madden
Michael F. Maguire
T.V. Mangelsdorf*
Nancy Cain Marcus
Colleen Martin
Sara Martineau
John D. McConnell, M.D.
Jerry McElhatton
Thomas E. Merkel*
J. Mitchell Miller
Bob Montgomery

Regina Montoya
Thomas J. Moore
Randall Muck
Terry Murphy
Tom Nealon
Dr. Albert W. Niemi, Jr.
Daniel P. Novakov
Hubert J. (Hugh) O'Brien*
Neil J. O'Brien*
Scot O'Brien
Dan Odum
Mary C. Oliver
Kevin P. O'Meara
Dan O'Neal
Bill Orender
Geoffrey C. Orsak, Ph.D.
Nicholas P. Panza
Ed Ramirez, Jr.
Stephen C. Rasch
Thomas W. Reidy

Dwight Risky
Marcos G. Ronquillo
Timothy P. Rooney
Len C. Ruby*
Andres Ruzo
Joseph E. Saar
M. David Saller
Gwendolyn Satterthwaite
C. Gregory Shamoun
Brian Shivers
Deacon Denis G. Simon
April B. Slovinsky
Raymond G. Smerge
Bonnie Smith
Webb Sowden, Jr.*
Marianne H. Staubach
John L. Strauss*
Timothy P. Tehan
Mary Templeton
Michael F. Terry

Jere W. Thompson*
John M. (Mike) Thompson
Wendy M. Traylor
Charles J. Tusa*
Michael J. Uhl
Thomas C. Unis, Jr.
David L. Van Buskirk
Frank Ventura
Wm. Kim Wade
Admiral Patrick M. Walsh
USN (Retired)
Tucean Webb
Max A. Wernick
Joseph P. Wilbert, Jr.*
Laura Fox Williamson
Mark Wischmeyer
David A. Yost, CFP

* Former Chairman of the Board of Trustees

Save the Dates
11th Annual Professional Advisors Series
Wednesday, December 13, 2017
Award Dinner
Saturday, February 3, 2018

12222 Merit Drive, Suite 850
Dallas, TX 75251



NON PROFIT ORGANIZATION
U.S. POSTAGE PAID
DALLAS, TX PERMIT NO. 2036