

# THE Good Word

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## FOUNDATION NURTURES TRUSTED RELATIONSHIPS TO BUILD UPON 2018 SUCCESS

Fueled by a growing interest in the establishment of donor-advised funds for charitable and tax giving purposes, and the increasing passion people have toward charitable giving, The Catholic Foundation recorded a strong performance in 2018.

“It’s important for us as a community foundation to gain the trust of existing and prospective donors to help them fulfill their charitable giving goals,” said Matt Kramer, president and CEO of The Catholic Foundation. “Cultivating and maintaining strong relationships with those who call upon us for assistance is one of our hallmarks.”

Reflective of a strong 2018 performance, the Foundation housed more than 440 charitable funds and trusts and managed approximately \$207 million in assets as of the end of last year. The increased number of funds and trusts led to more parishes, Catholic schools and non-profits receiving funding for meaningful projects.

Last year, the Foundation awarded more than 2,000 grants, totaling over \$22 million and impacting more than 650 organizations. In February, the Board of Trustees presented the largest single grant in Foundation

history - \$1.1 million - to Holy Trinity Seminary. The grant honored Kevin Cardinal Farrell and goes toward the construction of the Cardinal Farrell Student Center at the seminary.

### Sustainability Drives Future Growth

Ensuring sustainability is protected for future growth remains a key organizational goal of the Foundation. To achieve growth, the Foundation relies heavily upon leaders who inspire fiscally responsible, ethical, smart and creative ideas. Last year, the Foundation added to its legacy of leadership with the election of more talented Board of Trustees, appointment of additional strong Advisory Council members, and recruitment of decorated professionals to fill key roles.

Uniting people and ideas that lead to further growth at the Foundation often happens at donor or professional advisor events that take place during the year. Building upon last year’s success, the Foundation will be announcing a variety of events that will take place throughout the year. 🐣



### THE PRESIDENT’S LETTER

Traveling with my wife, Kris, and a group of pilgrims in the Holy Land during Advent allowed me to step back from the daily operations of The Catholic Foundation and offer gratitude for all our blessings and the opportunity to serve. More spiritual encounter than a vacation, our trip was unlike any that I’ve taken.

My time along the Sea of Galilee and singing with fellow Christians in Bethlehem at the Church of the Nativity were perfect places to say, and sing, prayers of thanksgiving for the growth and excitement experienced by the Foundation in 2018. (See photo,

page 4) Traveling to the Holy Land with several donors led me to reflect upon the value of trust that people place upon us at the Foundation as we help assist in the creation and growth of charitable giving legacies.

We’re ready to help donors make an even bigger impact on the Catholic community this year. Our team is prepared to build upon the success of the Foundation you’ll read more about in this edition of *The Good Word*. I’m looking forward to a vibrant 2019 as long-time and new friends trust us to help fulfill charitable giving goals. Here’s to a healthy, prosperous and blessed 2019 to you and your loved ones. 🐣

J. MATTHEW KRAMER

# A Strong FOUNDATION

## G. Marc Lyons Elected Foundation Board Chairman



Marc Lyons, who joined The Catholic Foundation Board of Trustees in 2014, has been elected chairman and will serve in that capacity in 2019 and 2020. He has served as vice chairman and chairman of the Investment Committee. He was also involved on the Audit and Administration, Development and Governance Committees.

Marc succeeds John Landon who served as board chair the past two years.

“The knowledge, expertise and passion that Marc brings to the role of chairman will propel the Foundation to even greater heights in our community during the next two years,” said Matt Kramer, president and CEO of The Catholic Foundation.

His business career spans 45 years in the oil and gas industry in various positions for Texaco, Southern Natural Gas Company, Enserch Corporation,

Energy Transfer and Crosstex Energy.

In 2017, he retired as president and partner of Cardinal Midstream. Marc obtained a bachelor’s degree in quantitative management from Nichols State University and completed Harvard University’s Program for Management Development.

Marc and his wife, Georgia, attend All Saints Catholic Church.

## Foundation Board Welcomes Three New Members

The Catholic Foundation has named Matthew Bowen, G. Michael Gruber and David A. Yost, CFP, to its 2019 Board of Trustees. Each director will serve a three-year term effective January 2019.

“We are gratified to add such tremendously talented people to our exemplary Board of Trustees knowing they will each continue making a positive impact in our Catholic community given their past work on our Advisory Council,” said Matt Kramer, president and CEO of The Catholic Foundation.



Matt Bowen, has worked with FIS since 2004. At the financial services company, Matt serves as Group Executive & General Manager of the Check & Document Imaging Solutions division.

He joined the company through its acquisition of Aurum Technology. Prior to FIS and Aurum, he served in sales and sales leadership roles with EDS and Unisys. Today, Matt oversees various growth initiatives, product management, software development,

service center operations, customer support, professional services and product line expansion.

Matt is a graduate of California Polytechnic State University. He, his wife, Gretchen, and children reside in Plano and attend Prince of Peace Catholic Community. He has served on the Advisory Council of The Catholic Foundation for the past seven years.



Mike Gruber, a partner at Dorsey & Whitney law firm in Dallas, and previously was co-founder of Gruber Hail Johansen Shank law firm and a managing partner at Goodwin Gruber. A trial attorney, Mike began his law career after receiving his bachelor’s degree from Southern Methodist University and his J.D. from the SMU Dedman School of Law. He has been recognized in D Magazine as “Best Lawyer in Dallas” in business litigation and as one of the “500 Most Influential Business Leaders” in Dallas.

Mike serves on the boards of the Southern Gateway Project, Lieutenant Governor’s Legislative Committee on Economic and Workforce Development, Dallas Zoological Society, Dream Dallas Project of Habitat for Humanity and North Texas Region of St. Jude Children’s Research Hospital.

He and his wife, Diane, attend St. Monica Catholic Church. Mike has served on the Advisory Council of The Catholic Foundation for the past 15 years.



David A. Yost, CFP, is a 30-year veteran of the financial industry, with expertise in wealth management services. He is a private wealth advisor with Morgan Stanley Private Wealth Management and is co-founder of The Davis/Yost Group within Morgan Stanley.

He previously served on the board of the Dallas American Red Cross, American Heart Association and Launchability. David served

on The Advisory Council of The Catholic Foundation for the past four years.

He and his wife, Mary, attend Christ the King Catholic Church in Dallas. David is currently training for an upcoming IRONMAN triathlon, having already completed both the Boston Marathon and Escape from Alcatraz Triathlon.

## Outgoing Trustees

The Foundation would like to thank our outgoing Trustees as they completed their terms at the end of 2018.

We’re grateful to John Landon who served as a Trustee and Chairman of the Board the past two years. We’re also very appreciative to Robert Berg, Alfredo Duarte and Vince Hess for their many years of service.

While on the Board, these men served on many of our five committees - Audit and Administration, Development, Distribution, Governance and Investment.

**John R. Landon, past Chairman**, joined the board in 2011. John chaired the Distribution and Investment Committees.

**Robert H. (Bob) Berg, CFP**, joined the board in 2013. Bob chaired the Investment Committee.

**Alfredo Duarte**, joined the board in 2013.

**Vince Hess**, joined the board in 2013. Vince chaired the Audit and Administration, plus Governance Committee.



Clockwise from top left: Landon, Berg, Duarte, Hess

# Giving SPIRIT



## Giving 101

by Cheryl Unis Mansour, Vice President of Development

### IRA Charitable Rollover

What is your passion? Is it education, social services, medical research, the arts or many other areas of philanthropy? How can you maximize your charitable giving, given the tax law changes in the 2017 Tax Cuts and Jobs Act?

You have a strategy if you have reached the age of 70 ½ and have a traditional IRA or other qualified retirement plan and have to take out a taxable required minimum distribution (RMD). Take advantage of the IRA Charitable Rollover to support charitable organizations important to you.

This new law made permanent your ability to transfer – up to \$100,000 annually - directly from the IRA custodian to the charity without owing any income tax on the distribution or counting it as income.

Any money you transfer via one of these distributions reduces the amount you must take in required minimum distributions. One caveat - donors are specifically not permitted to make charitable rollovers to donor-advised

funds, supporting organizations, or private foundations and can't reserve any right to direct the use of the funds once given.

However, we can assist you in creating a charitable Designated Fund at The Catholic Foundation with your qualified charitable distribution (QCD), and that gift will support the charities important to you.

When creating a fund of this type you must name the target charity or field of charitable interest (one or more) and the schedule for distributions. With sufficient funding, endowments can also be created to make annual distributions to the named charities or fields of interest.

Once the gift is set up, the donor cannot influence the manner in which the charity can use the funds, and the donor must give up control of, or influence on the funds. The Catholic Foundation will then invest and distribute the funds that will carry out the donor's original intentions.

It's easy to accomplish, and your IRA manager is familiar with processing your request. Supply them with the name of The Catholic Foundation, 12222 Merit Drive, Dallas, Texas 75251, and follow our transfer instructions found on our website, [www.catholicfoundation.com](http://www.catholicfoundation.com).

Copy The Catholic Foundation on your instructions so the Foundation can look for the proceeds to come into the account. The staff at The Catholic Foundation will create an agreement outlining the charities you wish to support and the timing of distributions.

This is an easy plan but it can't wait until too late in the year or you risk your IRA manager sending your "distribution" to you and then it may be too late.

It's also a good technique for persons who don't need all their required IRA distribution for living expenses.

We would be delighted to discuss this charitable giving option with you at any time. You may reach me, Michael George, or Mike Murray at 972-661-9792.

There is never an obligation. We will only explore the many ways The Catholic Foundation can help you with your philanthropy.

We believe the more you save in taxes, the more you will be able to enjoy the satisfaction of supporting worthy and important efforts to help others. 🙏



### Scholar Award Named in Honor of Former Foundation Leader

The name of the Catholic Foundation Scholar Award has been changed to the Hal Tehan Scholar Award in honor of the late Foundation leader and donor.

"A man fully dedicated to his faith and community, Hal Tehan's passing last year was a tremendous loss for The Catholic Foundation, our Catholic community and all of Dallas," said Matt Kramer, president and CEO of The Catholic Foundation.

A 1997 recipient of The Catholic Foundation Award, Tehan graduated from the University of Notre Dame. In 1981, he

accepted the full-time position of Executive Director of The Catholic Foundation after a 32 year career with the Haggar Company.

At The Catholic Foundation, Tehan grew the organization into one of the most successful in the nation. During the 37th annual Award Dinner, the Hal Tehan Scholar Award will be presented to Gerard Cardenas, a junior at Cristo Rey Dallas College Prep.

# A LIGHT *On*

## A 'YEAR ON THE PLAZA' WINNER CELEBRATES BIG D



Emily Holman Morris' artwork titled, "Windows to the City," was selected as the 13th winner of the 'A Year on the Plaza' art competition in October. Created as a tribute to the architecture of the Cathedral Shrine of the Virgin of Guadalupe and the iconic scenes of Dallas, the 28-by-9-foot public art wall in The Catholic Foundation Plaza will remain on display for one year.

Holman Morris began painting in 2009, and received her master's degree in fine arts from Academy of Art University in San Francisco. Located on the grounds of the Cathedral Shrine of the Virgin of Guadalupe across from the Meyerson Symphony Center, The Catholic Foundation Plaza was dedicated in 2006 as a gift from The Catholic Foundation to the Dallas community. The 3,900-square-foot public space is an oasis for Dallas citizens and visitors to enjoy at no cost. 🐣

## HOLY LAND PILGRIMAGE

Led by Father Peter Vasko, OFM, and President of the Franciscan Foundation For the Holy Land, several Catholic Foundation leaders and donors participated with travelers from other states in an Advent season Holy Land Pilgrimage. During the spiritual encounter, the travelers visited countless historic locations read about in the Bible.

**Shown left to right:** Catholic Foundation president and CEO Matt Kramer and wife Kris; Foundation donors Burk and Elise Murchison; Fr. Vasko; Catholic Foundation Vice President of Development Cheryl Mansour; and Foundation donors Richard and Shelley Stanzel. 🐣



## PR VETERAN JOINS FOUNDATION STAFF



Bill Kula, an accredited member of the Public Relations Society of America, has joined The Catholic Foundation as its new director of marketing and communications.

He brings more than 30 years of external and internal communications, crisis communications, marketing and social media experience from senior roles at Verizon, GTE, Greyhound, plus his wife's PR and Marketing firm, The Kula Group, where he represented various non-profits, professional services firms and corporations.

Bill, a third degree Knight of Columbus, is actively involved as a community volunteer. He manages communications and social media for the

annual Dallas Catholic Youth Conference; the North Texas Catholic Brothers for Christ ministry that serves men in both the Dallas and Fort Worth Diocese; his award-winning neighborhood association in Plano; and the Silver Wings dance team at Hebron High School where his two teenage daughters attend. He's a past president of the board for the Plano Symphony Orchestra.

Bill, his wife, Wendy, of 25 years in April, and daughters are long-time Prince of Peace Catholic Community parishioners. At Prince of Peace, Bill serves as a senior acolyte, lector, extraordinary minister of Holy Communion, and served as a youth catechist for nine years. 🐣

# 2019 CATHOLIC FOUNDATION AWARD DINNER COMMITTEE

Irma and Alfredo Duarte served as chairs of the 2019 Award Dinner Committee for the 37th annual Catholic Foundation Award Dinner on February 16 at the Hilton Anatole in Dallas that honors Raul Estrada.

Many members of the Dinner Committee, sponsors and Trustees, gathered at the home of Barbara and Jim Moroney, III in mid-January to commemorate the work done to prepare for the annual event that recognizes distinguished service that supports religious, charitable and educational needs within the Catholic Diocese of Dallas.



L to R: Jim and Barbara Moroney



L to R: Raul Estrada, Bishop Edward Burns



L to R: Dan and Lydia Novakov, Michael George, Chris and Kelly Taylor



L to R: Matt Kramer, Vicky and Doug Lattner



L to R: Alfredo and Irma Duarte, Carmen and Raul Estrada



L to R: Mike and Mary Terry, Bishop Edward Burns, Cheryl Mansour

## THIS YEAR'S AWARD DINNER COMMITTEE MEMBERS ARE:

Irma and Alfred Duarte - Chairs  
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Kathleen and Dave Woodyard  
Mary and David Yost

## LOCAL ORGANIZATIONS AWARDED \$692,000 IN GRANTS DURING FALL CEREMONY

The Catholic Foundation awarded \$692,000 in grants to North Texas churches, schools and community organizations during the Foundation's 2018 fall grant ceremony at Sisters of Our Lady of Charity, a 2016 grant recipient. The Catholic Foundation awarded \$850,000 in grants to 23 organizations during the 2018 spring grant ceremony.

In addition to funding major building renovations and technology upgrades for churches and schools, the grants will finance a branding project and the expansion of a community program that assists expectant mothers.

Grants are made from the unrestricted Philanthropy Fund and restricted funds of The Catholic Foundation.

The 2018 fall grant recipients are below:

**CATHOLIC PRO-LIFE COMMITTEE** | Branding project  
**CRISTO REY DALLAS COLLEGE PREP** | New chapel  
**THE HIGHLANDS SCHOOL** | Repair high school elevator

**IMMACULATE CONCEPTION CATHOLIC CHURCH – CORSICANA** | Complete renovation of open-air pavilion

**THE PINES CATHOLIC CAMP** | Construction of housing for missionary leadership

**ST. BERNARD OF CLAIRVAUX CATHOLIC SCHOOL** | Update HVAC systems (Partial funding provided by The Joe & Hazel Fechtel Fund of The Catholic Foundation)

**ST. FRANCIS OF ASSISI CATHOLIC CHURCH – FRISCO** | Installation of interactive displays & digital signage in the parish center

**ST. JUDE, INC.** | Partial roof replacement on St. Jude Center

**ST. PATRICK CATHOLIC CHURCH – DENISON** | Replace stained glass windows

**ST. PAUL THE APOSTLE CATHOLIC CHURCH** | Discernment house renovations

**WHITE ROSE WOMEN'S CENTER** | Expansion of Magdalene program

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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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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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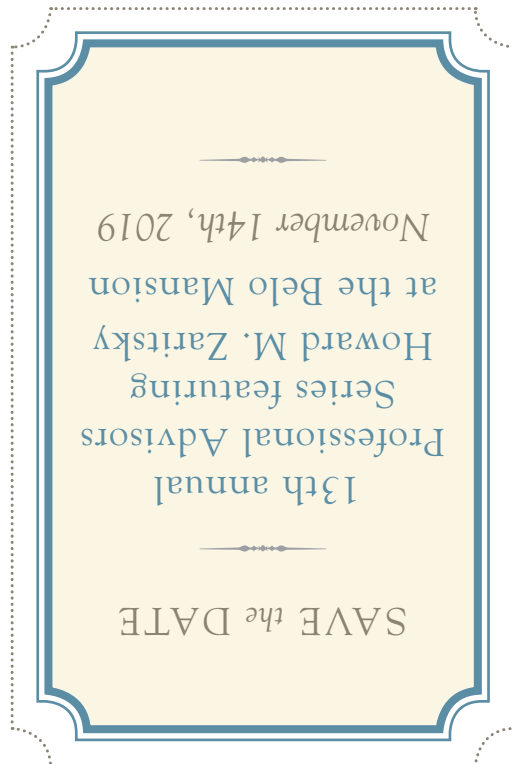
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