

THE Good Word

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CULTIVATION OF LONG-TERM RELATIONSHIPS LEADS TO STELLAR 2019

Donors expressed their charitable vision in record fashion in 2019, producing unrestricted and restricted contributions in excess of \$26.5 million last year, more than the total contribution of 2018 and 2017 combined.

The activity included a stellar fourth quarter in which more than \$14 million in gifts of varying types were made to The Catholic Foundation.

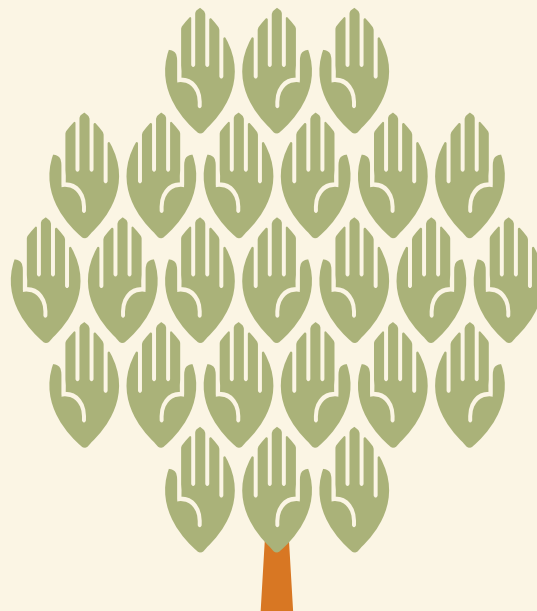
Matt Kramer, president and CEO of The Catholic Foundation, credits much of the strong performance to work begun years ago with individuals who expressed interest in partnering with the Foundation to magnify their charitable vision.

“Our team has cultivated very strong relationships over the years,” he said. “Our work is not a short-term proposition and requires an incredible amount of seed planting to achieve this type of success in assisting donors with

creating charitable plans that will benefit our community for years to come.”

Total Grants Awarded Now Exceed \$203 Million

Many of the gifts received, and transactions completed lately, have been sophisticated in nature.



“We’ve experienced a rise in testamentary gifts from people in the Dallas area who want to leave a charitable legacy as part of an estate plan,” said Cheryl Mansour, Foundation Vice President of Development. “We’ve also had more gifts generated from the selling of businesses and stock that requires special treatment.”

Reflective of the dynamic 2019 performance, the Foundation now manages approximately \$234 million in assets housed in more than 470 charitable funds and trusts. The increased funds and trusts enabled more organizations to receive grants last year.

In 2019, more than 660 organizations including churches, schools and non-profits received grants totaling nearly \$34 million. That raises to more than \$203 million the amount of grants the Foundation has awarded to religious, charitable and educational organizations over time. 🌟



THE PRESIDENT’S LETTER

During our 38th annual Catholic Foundation Award Dinner, I had the pleasure of standing next to our honoree, Joe Dingman, as more than 1,000 guests arrived for a fabulous evening to celebrate Catholic philanthropy.

One after another, I heard people of varying backgrounds thank Joe for his visionary work as an ambassador for affordable housing issues in the region.

Some of the guests had partnered with Joe on a project that turned a once dilapidated building into a clean, wonderful residence that former homeless individuals now call home.

Others were the very people who have benefitted from Joe’s passion to create dignified places of living to those in search of a personalized dwelling.

As a person who has never sought the limelight, Joe received the heartfelt hugs, handshakes and smiles with humility and grace.

He found a way to bring light to the importance of affordable housing, and in the process, impressed upon everyone the impact of volunteerism and mentorship.

Our Donors partner with the Foundation in ways that help hundreds of non-profit organizations coast to coast, reflecting a wide array of interests. Many of our Donors don’t just support the organizations financially, but also with their gift of time.

If you’ve wanted to resume, or start, making an impact in the lives of others, let me encourage you to follow in Joe’s steps and volunteer for good.

Your opportunity will likely be different from the one presented to Joe. Finding a charity that taps your interests takes serious thought.

Whether you get involved in affordable housing issues like Joe, or other worthy causes such as education, financial literacy, social services, feeding the hungry or others, the key is taking the first step in order to lead by example and let your God-given talents shine. 🌟

J. MATTHEW KRAMER

A Strong FOUNDATION

THREE NEW TRUSTEES BRING ADDITIONAL STRENGTH TO FOUNDATION BOARD

Lois S. Cartwright, Ana Esteve Yoder and Thomas G. Yoxall have joined The Catholic Foundation Board of Trustees and will serve a three-year term through 2022.

“The exceptional expertise, wisdom and dedication of these individuals will be invaluable to our Board of Trustees,” said Matt Kramer, president and CEO of The Catholic Foundation. “We are grateful for their commitment to our mission and look forward to the impact they will have on the Foundation and our Catholic community.”



Lois S. Cartwright

Lois S. Cartwright, a Certified Retirement Planning CounselorSM and wealth advisor, is a Senior Vice President at Merrill Lynch. Lois has over 35 years of specialized work experience as a personal investment advisor for a select group of high-net-worth families and individuals.

She completed advanced studies in financial analysis at The Wharton School and earned her Bachelor of Business Administration with concentration

in accounting and economics at The University of Kentucky. For three consecutive years, Lois has been named one of *Barron's* Top 100 Women Financial Advisors in the United States as well as *Barron's* Top 1000 Advisors.

She has been quoted in several trade publications including Corporate Governance Matters, Women in Business and The Freight Brokerage Industry retirement plan specialist column. Lois and her husband, Edwin O. Cartwright, III, are members of St. Rita Catholic Community and have three grown children.

Ana Esteve Yoder brings experience as an attorney to the Board of Trustees. Ana received her Bachelor of Business Administration in Accounting with a double major in French from The University of Notre Dame. She earned her Juris Doctor degree from Southern Methodist University Dedman School of Law.

She currently serves as a member on the Ursuline Academy Board of Trustees and Lyceum Club.



Ana Esteve Yoder

She is also a past board member of SMU Catholic Campus Ministry and has previously volunteered with National Charity League Mockingbird Chapter, the Dallas Junior League, Head Start, Literacy Volunteers of America, CASA, the Baylor Foundation, Ursuline Academy, Cistercian Preparatory School and Christ the King Catholic School.

Ana and her husband, Jim Yoder, have four children and are members of Christ the King Catholic Church.



Thomas G. Yoxall

Thomas G. Yoxall (Tom) is a longtime partner and Vice-Chair at the law firm of Locke Lord, practicing commercial and class action litigation. He has been named Best Lawyers in Dallas by *D Magazine*, Texas Super Lawyer by *Super Lawyers* magazine, The Best Lawyers in America by Commercial Litigation, and Best Lawyers Under 40 by *D Magazine*.

Tom currently serves as a board member and former board chairman at Bishop Lynch High School, a member of the

St. Thomas Aquinas Parish Finance Council and member of the Serra Club of Downtown Dallas. He has also served as a board member and Chair of the St. Thomas Aquinas School Board, a member of the advisory board of the Young Catholic Professionals and served on the Advisory Council of The Catholic Foundation for years.

Tom is a graduate of The University of Texas at Austin and Southern Methodist University Dedman School of Law. Tom and his wife, Tish, are parents to three children and members of St. Thomas Aquinas Catholic Church.

Jim Ryan Wraps Up Second Term as Trustee

The Foundation would like to thank our outgoing Trustee Jim Ryan as he completed his second term at the end of 2019.

While on the Board, Jim served on the Audit and Administration, Executive and Governance committees and secretary of the Board of Trustees in 2019.



Jim Ryan

ORGANIZATIONS BENEFIT FROM KINDNESS AND PASSION OF DEPARTED DONORS

Spotlight on The Saar Education Fund of The Catholic Foundation

Our community and The Catholic Foundation lost two wonderful donors, Joseph and Grace Saar, in 2019.

The couple had a special place in their hearts for a number of organizations that they requested be beneficiaries of The Saar Education Fund of The Catholic Foundation.

For years while they were living, Joe and Grace provided assistance in the form of scholarship grants and cultivated their vision of an education fund after they passed away.

“Joe and Grace wanted to provide current funding for many organizations as well as the means to build an endowment fund

that'll benefit others for years to come,” said Catholic Foundation president and CEO Matt Kramer. “Joe and Grace were passionate about the power of endowment funds and the income stream which they can provide over time.”

The organizations they chose are entitled to receive various percentages of the fund's balance distributed annually, and designated for various causes such as tuition assistance for students with a demonstrated financial need.

Additional funding will be placed in an endowment fund created at The Catholic Foundation in the name of The Saar Endowment for the organizations. 🙏



Joe and Grace Saar

Giving SPIRIT



Giving 101

by Cheryl Unis Mansour, Vice President of Development

Bifurcated Gifts

When it comes to Donor-Advised funds (DAF) and grants, there's a bit of good news and bad news to share as we seek to keep you up to date on the charitable giving world.

DAFs continue to deliver great value. They are also growing in popularity at community foundations like The Catholic Foundation.

The Internal Revenue Service recently issued a notice involving charitable gifts, and DAFs are now prohibited from providing any benefits that are more than incidental to the Donor or anyone related to them.

As a result of the IRS notice, some changes have been made to our daily operation.

The good news is that your DAF will now be able to pay a personal pledge you want to make to a charitable organization.

Grants from a DAF for pledges made by donors were previously not allowed, and this new beneficial rule is now in effect.

The bad news is that effective April 30 of this year, we can no longer approve grants to pay for events, galas, memberships and dues where there is an economic benefit included in the cost.

Previously, we approved such grants where the costs were bifurcated, or split, with the

charitable portion paid from your DAF and the benefit portion paid directly by you to the non-profit organization.

We understand these changes will affect you as an individual and the agencies you support, so please reach out to us to help you navigate any issues that these changes cause.

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Thank you for your continued support of The Catholic Foundation. For additional information on DAFs, please call Michael George, Elizabeth Murray or me at 972-661-9792. We look forward to visiting with you. 🐟

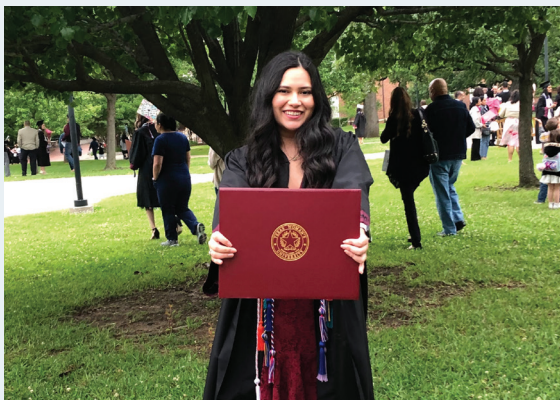
SCHOLARSHIP FUNDS INSPIRED BY VISIONARY DONORS

The Catholic Foundation administers many scholarship funds thanks to the generosity of our Donors. Each fund is different, and uniquely shaped by the focus, vision and charitable passion of each benefactor.

Below is a small sampling of some of those funds.

THE MARY ELISABETH BETZ MEMORIAL FUND

Benefits Hispanic, Catholic students who are pursuing a Bachelor of Science in Nursing.



LOUISE EMMA BUHRER ENDOWMENT FUND

Benefits the elderly, provides tuition assistance to youth attending Catholic elementary school

and financially assists students attending Ursuline Academy of Dallas.

THE HOLY LAND SCHOLARSHIP FUND OF THE CATHOLIC FOUNDATION

Benefits Catholic college students with funding for scholarships for the Franciscan Foundation for the Holy Land's University Scholarship program, whose purpose is to enable students to study, work and live in the Holy Land.

THE JETHSUBY SCHOLARSHIP FUND OF THE CATHOLIC FOUNDATION

Benefits Hispanic students, helping their families offset the cost of attending Dallas-area Catholic elementary schools.

THE TRUETT & RITA SMITH FOUNDATION FUND

Benefits a number of organizations, including tuition assistance for students who attend Ursuline Academy of Dallas.



THE RONALD F. WALTERS SCHOLARSHIP FUND

Benefits students in kindergarten through 8th grade who attend Our Lady of Perpetual Help Catholic School, allowing them to have a strong and vibrant Catholic education.

THE JOANNE WASOFF SMITH SCHOLARSHIP FUND

Benefits 8th grade students at St. Thomas Aquinas Catholic School who plan to attend Bishop Lynch High School.

A LIGHT On

LOCAL ORGANIZATIONS RECOGNIZED DURING FALL GRANT CEREMONY

The Catholic Foundation awarded \$862,656 in grants to 19 local schools, churches and community organizations during its fall grant ceremony.

The grants will help fund major building renovations, finance technology upgrades, purchase vehicles, buy textbooks and build a new sanctuary.

Spring and fall grants are made from the unrestricted Philanthropy Fund and restricted funds of The Catholic Foundation.

The 2019 fall grant recipients and their projects are as follows.



The Catholic Foundation fall grant ceremony recipients with Foundation president and CEO Matt Kramer (far right) at St. Gabriel the Archangel Catholic Church in McKinney




Ann Letteer, Trustee Dan Odom, Ashley D'Amico, Maria Eichhold-Puccini and Keara King with In My Shoes, and Matt Kramer



Gabriel Moreno, All Saints Catholic School



Sr. Sandra Helton, Santa Clara of Assisi Catholic Parish

ALL SAINTS CATHOLIC SCHOOL Replace HVAC	BISHOP DUNNE CATHOLIC SCHOOL Women's Athletic Facilities
BLESSED SACRAMENT CATHOLIC PARISH Renovation of Gathering Space	CATHOLIC CONFERENCE AND FORMATION CENTER Maintenance Vehicle
DALLAS DISCALCED CARMELITE MONASTERY New Flooring (Partial funding provided by the O'Connell/Schulze Fund)	HOLY FAMILY OF NAZARETH CATHOLIC CHURCH Electrical Boxes
HOLY SPIRIT CATHOLIC PARISH New HVAC for Church	IN MY SHOES New HVAC
MARY IMMACULATE CATHOLIC SCHOOL Touch Panels for Classrooms	NOTRE DAME SCHOOL OF DALLAS Passenger Van
SANTA CLARA OF ASSISI CATHOLIC PARISH Furnishings & Equipment	SMU CATHOLIC CAMPUS MINISTRY Part-Time Counselor
ST. ALBERT THE GREAT PRIORY Renovate Upstairs Priory (Partial funding provided by the Bradley Fund)	ST. BERNARD OF CLAIRVAUX CATHOLIC CHURCH New HVAC for Church
ST. CECILIA CATHOLIC SCHOOL New Roof	ST. JOSEPH CATHOLIC SCHOOL in Richardson Middle School Technology Renovation
ST. MICHAEL THE ARCHANGEL CATHOLIC PARISH in Grand Prairie New Church	ST. PAUL THE APOSTLE CATHOLIC SCHOOL Textbooks
ST. VINCENT DE PAUL PHARMACY Outreach/Outcome Analyst	

Factoring the annual spring and fall grants, along with grants from Donor Advised Designated Funds, The Catholic Foundation granted nearly \$34 million to more than 660 organizations in 2019. 🐦

2020 CATHOLIC FOUNDATION AWARD HONOREE CELEBRATED AT ANNUAL DINNER

On a night lined with humility and grace, more than 1,000 guests honored entrepreneur, philanthropist, mentor and affordable housing advocate Joe Dingman as the 38th annual Catholic Foundation Award honoree for his impact in the greater Dallas area the past 30-plus years.

During the evening, Cristo Rey Dallas College Prep junior Yadira Compean received the Hal Tehan Scholar Award and a \$5,000 scholarship.

“You don’t need a special skill set to be a mentor. You just need to be interested in the outcome and able to make a connection with another person as a human being,” Joe told the audience in accepting the honor. “It isn’t tutoring. It is leading by example. It isn’t teaching. It is spending time together periodically and helping the other person develop and hone skills.

“I challenge you to get out of your comfort zone. I invite you to volunteer with a group or take on a mentee, added Joe. “You’ll be amply rewarded, and you’ll be setting the stage for that social good down the road.”

Yadira told guests that taking on the journey of a Catholic education has been one of the best decisions of her life.

“Today, I feel blessed to attend Cristo Rey Dallas because I’m constantly being fulfilled by my Catholic education, not only because I get to put my academic talents to good use, but because I get to see the beauty of daily prayer.” 🙏



1 Family members and friends congratulate Joe Dingman
2 Hal Tehan Scholar Award recipient Yadira Compean
3 The Catholic Foundation president and CEO Matt Kramer, 38th annual Catholic Foundation Award recipient Joe Dingman and The Catholic Foundation chairman of the board, Marc Lyons
4 The Dallas Strings Quartet performs for guests

5 Joe Dingman with his mentee, Alexander Garcia
6 Dallas Bishop Edward Burns
7 (Seated) Richard and Shelley Stanzel, Thomas and Susan Stanzel (Standing) Donald and Rose Hoff, Rachel Trowbridge, Paul and Marian Stanzel, Fr. Jonathan Austin
8 St. Jude Center residents with Joe Dingman

9 Dinner chair Sister Mary Anne Owens, SSND
10 (Seated) Jack and Aileen Pratt, Dallas Auxilliary Bishop Greg Kelly, Dan and Lydia Novakov (Standing) Jim and Margo Keyes, Sara and David Martineau
11 Tracy Eubanks, CEO of Metrocrest Services, with Marc Lyons

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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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