

A Great Year in Giving

Last fiscal year (July 1, 2020 - June 30, 2021), The Catholic Foundation granted over \$14 million dollars to education, parishes, social services, and vocations in the Catholic Diocese of Columbus. Because of the generosity of our donors who chose to give through The Catholic Foundation, almost 600 organizations received funding to better serve their missions.



Development Officer, Christy Steffy, cheerfully presented a grant check to Darren Smith, Principal of St. Pius X School, and Fr. David Young, Pastor of St. Pius X Catholic Church in Reynoldsburg. The funds will go towards a roof replacement at the school.

Brooke Warren, Marriage Formation & Stewardship Coordinator at St. Matthew the Apostle Church received grant funds on behalf of Scott Hartman, Vice President of Development, to help support two sessions of the FORMED series called The Search.

Loren Brown, CEO of The Catholic Foundation, presented Marilyn Mehaffie, CEO of St. Stephen's Community House, a grant that will help this long-standing ministry perform a full building assessment to determine how they can best continue to serve the changing needs of the Linden community.



It's all smiles for Michelle Ashley, principal at Notre Dame Elementary in Portsmouth and Jim Hahn, Development Officer, as the school received grant money to help repair a crushed drainpipe that was causing water issues in the cafeteria and install shade sails for the playground.



TCF Welcomes New Team Members



Jim Hahn, RICP®
DEVELOPMENT OFFICER

FAITH FACT: In 2002, Jim wrote a book called "Rosary Meditations for Real Life" that was translated and published in Poland in 2015.



Jean Spinosi
DIRECTOR OF MARKETING & COMMUNICATIONS

FAITH FACT: One of the best gifts Jean received is her Catholic education (thank you, mom & dad!). She attended St. Matthias School and St. Francis DeSales High School in Columbus and John Carroll University in Cleveland.



Annie Pfanner
EXECUTIVE ASSISTANT & GRANTS COORDINATOR

FAITH FACT: Annie's own Catholic faith was ignited in college. After graduation, she served as a Campus Missionary at Seton Hall in New Jersey with Saint Paul's Outreach (SPO). Through her ministry work, she helped fortify a strong Catholic community on campus and go on to serve as SPO's Regional Administrator for a few years.



Andrea C. Pannell, OPA
VICE PRESIDENT OF STEWARDSHIP

FAITH FACT: Andrea is a spiritual director who works with the faithful one-on-one and in private retreat settings. Her daily prayer is Ephesians 1:18-23.



Suzanne Roberts
STEWARDSHIP COORDINATOR

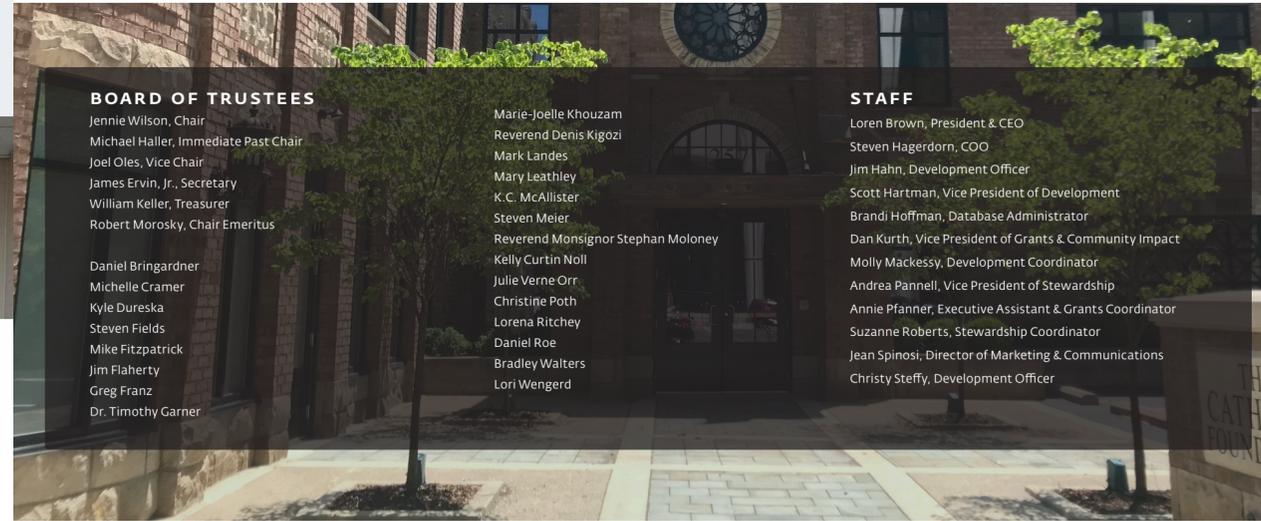
FAITH FACT: Sue loves reading about the lives of the saints! She celebrates her own patron saint, St. Suzannah (August 11th) and reminds each member of her family when it's their "Saint Day."



Congratulations to Chief Operating Officer, **Steve Hagerdorn**, on his 10th Anniversary with The Catholic Foundation. As COO, Steve oversees accounting & finance (lots of spreadsheets!), data management and ensures the Foundation is operating as efficiently as possible. Thank you, Steve, for your 10 years of service and counting.



In Christ, we inspire generosity to invest in the future of parishes, schools, vocations, and ministries in our Catholic community.



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Suzanne Roberts, Stewardship Coordinator
Jean Spinosi, Director of Marketing & Communications
Christy Steffy, Development Officer

WINTER 2022

Blessings



NEWS FROM THE CATHOLIC FOUNDATION

catholic-foundation.org

Paying it Forward

A new year tends to usher in a wave of hope and eagerness to start anew. Perhaps you set an intention to better yourself mentally, physically, or spiritually. Whatever your resolution might be, hopefully you're still chipping away and feeling a sense of accomplishment. On the other hand, don't beat yourself up if you've already thrown in the towel on your "Things to Do in 2022." God has a plan for all of us. His intention remains the same year after year: Keep your heart open to His word and spread good will to all His children.

"Pay it forward" is a well-known phrase that means one can respond to a person's kindness by being kind to someone else. Imagine if everyone's resolution was to pay it forward in 2022? The Catholic Foundation was blessed to catch up with **Bishop James A. Griffin, J.D., J.C.L.**, who shared his thoughts on perpetuating acts of kindness.

"One of the legendary Ohio football coach Woody Hayes' favorite lines was "pay it forward." In this shorthand expression of traditional wisdom, Woody was telling others that, while you cannot often pay back for the kindness of others to you, you can always pay forward. He was encouraging others to reciprocate for the kindness which they received in life by sharing kindness with others.

I am certain that all of you have read, observed or been personally part of this pay it forward wisdom. You have experienced the positive effects on our common culture by one - or many - acts of pay it forward. I am also certain that each of you has experienced that personal sense of fulfillment and satisfaction that one receives when he or she is the one who is paying it forward.

Acts of good will come in all shapes and sizes. There is no such thing as an insignificant act of kindness. We are all called upon to do what we can, but the important thing to remember is that an act of kindness has the power to influence one person, a few people, or an entire community. That is the ripple effect of pay it forward and it's a beautiful thing.

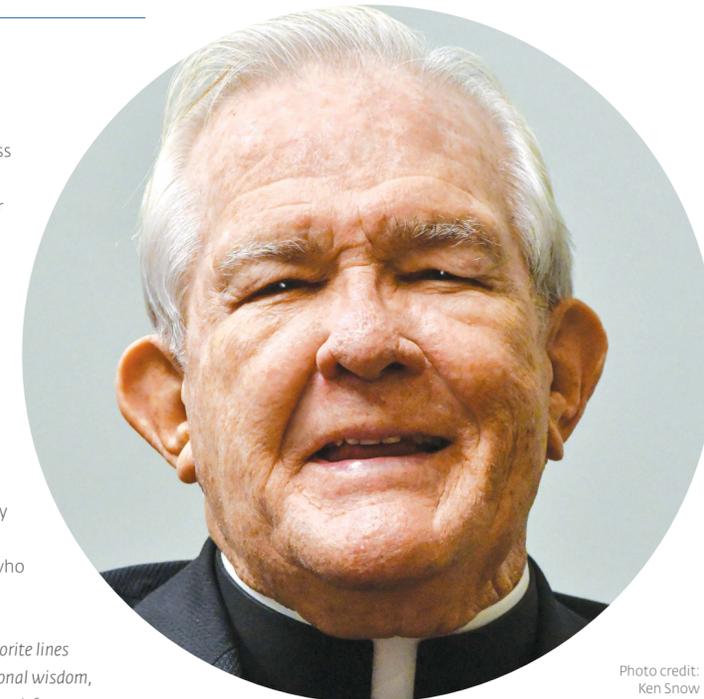


Photo credit: Ken Snow

Our Catholic Foundation is a living example of the tremendous effect we can have on our Church and community when we join others in a common effort to pay it forward. We'll never know the amount of people affected by the acts of kindness so many have shown through The Catholic Foundation over the past 30 years and counting. This should inspire all of us to do whatever is within our means to pay it forward. God bless you always."

Bishop Griffin was installed as the tenth Bishop of the Diocese of Columbus on April 25, 1983 and served the Columbus faithful until his retirement in October 2004. He was regarded as one of the driving forces behind the formation of The Catholic Foundation. Bishop Griffin enjoys reading, playing golf (9 holes with a cart) and even in retirement, remains a beacon of light and hope to all the faithful in the Catholic Diocese of Columbus.

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THE CATHOLIC FOUNDATION



WINTER 2022



A Message From Our CEO

LOREN BROWN
PRESIDENT AND CEO

Dear friends in Christ,

We're well underway into 2022, and I pray you are staying healthy and content. This year marks my 11th year as President & CEO of The Catholic Foundation. Reflecting over the past years, particular events and encounters come to mind, but my heart always gravitates towards one thought: The generosity of our donors. When you choose to contribute through The Catholic Foundation, you're giving to your Catholic community. These benevolent acts of stewardship benefit present-day operations and have a profound effect on future planning and sustainability of Catholic organizations.

This edition of Blessings introduces us to some new faces while taking a stroll down memory lane with a dear friend. I'm grateful to Bishop Griffin for reminding us of the significance of "Paying it Forward." So often we hear the phrase, but do we make a conscious effort to practice it? Putting it into motion can be as simple as a kind word to a stranger or holding the door for someone who might be a few steps behind. As Bishop mentions, giving through The Catholic Foundation is also a significant way to pay it forward and have a positive impact on your faith community. If you're looking for real-life examples, I encourage you to look at the pictures of some of the grant recipients and learn how they're using their funds to fortify the work they do in our Catholic community. Paying it forward at its best!

It is my honor to lead, serve and walk this journey with you. My team and I are always at your service. Please don't hesitate to contact us if we can facilitate your current or planned giving needs.

May God bless you,

Have You Ever Thought About Bequeathing a Life Insurance Policy?

The primary purpose of life insurance is to provide for the needs of those who depend upon you financially. Your loved ones can use those proceeds to eliminate debt, replace income, and much more. Life insurance can also help you leave a legacy, not just for the people you love, but for those organizations and causes that have made an impact in your life and have a special place in your heart.

According to a survey by LIMRA (Life Insurance Marketing and Research Association) more than 25% of those who own life insurance say they purchased a policy for the purpose of charitable giving. Using life insurance to give to charity is a smart way to give. Since the death benefit of policies are often much larger than premiums paid, it's a powerful way to provide for those organizations and causes you love.

There are a few ways you can donate a life insurance policy to a charity. Be aware that the tax benefits vary depending on the method you use. Plus, the insurance company might require that you have a history of giving to a particular charity to donate your life insurance policy to it. Always consult your professional advisors for tax and legal advice before making any of these changes.

GOOD TO KNOW

(Formerly known as Development Corner) is written especially for you by a member of The Catholic Foundation's Development Team.

FUND SPOTLIGHT

Nativity of Mary Scholarship

It's that time of year when The Catholic Foundation is hard at work collecting, reviewing, and granting scholarships. Year after year, our team has the great fortune of witnessing the impact of the 26 scholarships currently offered to Columbus area students, especially those that help families send their children to a Catholic school. A Catholic education is rooted in academic excellence and Christ's teachings, and is often described by many who attended parochial school as something special.

This is the very reason our donor approached The Catholic Foundation about opening a scholarship in her mother's honor. She recalled attending a gathering and hearing The Catholic Foundation's CEO, Loren Brown, talk about a city where Catholic education was subsidized through high school. Imagine how many children were blessed with a Catholic education! This stuck with her over the years until she decided now was the time to put plant her seed.

"My parents put my five siblings and me through Catholic school. Not only was it a great education, but it helped strengthen my Catholic values. I felt a strong desire to do the same for others." When the donor called Development Officer, Christy Steffy, to help get the scholarship established, a meeting was set up for September 8, 2021. The donor, who had been praying to the Blessed Mother for guidance, realized this date was The Nativity of Mary. Her new scholarship now had a proper name.

When establishing criteria for The Nativity of Mary Scholarship, the donor felt it was important to open the application to students who

One of the simplest ways to donate life insurance proceeds to charity is by **Naming the Charity as a Beneficiary**. The charity could be the primary beneficiary or one of many beneficiaries of the policy. This is often easily done through a change of beneficiary form from the insurance company.

Another option is to **Assign Ownership** of the policy to the charity. Rather than name a non-profit the beneficiary of your policy, you could transfer ownership of an existing policy to give the organization immediate control of the contract. It could name itself the beneficiary and receive a tax-free payout when you die. You may also receive an immediate tax deduction.

You have another option if you want to get a charitable contribution tax deduction but don't want to transfer ownership of your life insurance policy. For those cash-value policies that pay dividends, consider having the insurance company **Gift the Dividends** to the charity of your choice.

More and more companies are taking philanthropy into consideration by offering **Charitable Gift Riders** for their life insurance policies. These riders do not subtract from the original



attend public school (if they are active parishioners of a parish) as well as Catholic schools. The donor hopes this scholarship will change the course for families who want to send their child to a Catholic high school, but don't have the financial means to do so.

The Nativity of Mary Scholarship is the first diocesan-wide scholarship available offering four \$2,000 scholarship to rising 9th grade students to help subsidize the cost of Catholic high school over four years. For the upcoming 2022-23 school year, the fund will help a rising 9th, 10th, 11th, and 12th grade student. The donor's goal is to grow the scholarship fund so it can help as many students as possible receive a free Catholic education. Every dollar donated puts this dream one step closer to reality.

If you would like to contribute to The Nativity of Mary Scholarship Fund, please visit www.catholic-foundation.org/endorsement-funds/scholarship or contact Christy Steffy at 614-443-8893.

face amount but rather provide a gift to a charity in your name should you pass away while your policy is in force.

Whether you are working with an existing policy or considering a new policy, charitable gifting using life insurance gives you the opportunity to provide a much larger gift in the future than you may be able to now. A good question to ask yourself is, "which organizations currently depend on my financial gifts and would incur a loss at my death?" Your parish through your weekly offerings? The high school where you, your children, and grandchildren have attended? The missions?

Using life insurance as a charitable giving tool ensures your contributions continue for generations to come. That's what I love about The Catholic Foundation's mission: In Christ, we inspire generosity to invest in the future of parishes, schools, vocations, and ministries in our Catholic community. Gifting through life insurance is certainly a powerful tool for providing for long-term needs.



Questions about making life insurance part of your charitable giving? Please contact Jim Hahn at jhahn@catholic-foundation.org or 614-443-8893.

THOMAS LYNCH, SR.

St. John Fisher Steward at St. Andrew Catholic Church

Tom Lynch has a passion for fine clothing, Cleveland sports (for better or for worse) and serving his Catholic faith with zeal. The man once known as "the mayor of Broad Street," owned and operated Woodhouse Lynch Clothier for forty years, which was widely regarded as the place to go if you were looking for a dapper suit. A Sandusky County native, Tom fondly recalls his family attending the 1948 World Series in Cleveland when the Indians played the Boston Braves, and all the fans wore a suit or dress to cheer their team to victory.

Fast forward to present day where dress codes have certainly changed but Tom's devotion to his Catholic community has remained steadfast. Tom is one the original board members (1995) of The Catholic Foundation, but his support started well before then. In 1984, he remembers sitting in Bishop Griffin's office with a few others as they discussed ideas on how to provide financial security to parishes, schools, and ministries throughout the Diocese of Columbus. A large part would be through parish endowment funds.

Having a clear understanding of what The Catholic Foundation was trying to accomplish, Tom took this knowledge to St. Andrew's Catholic Church, where he's been a parishioner since 1985. He started to work with Father Michael Watson, Monsignor Stephan Moloney, and the finance committee on making parishioners over the age of 60 aware of the parish endowment and educate them on ways to include St. Andrew in their estate planning.

It is through this advocacy for parish endowments that Tom is an honored member of the St. John Fisher Stewards. The role of a St. John Fisher Steward is to promote the growth of parish endowments through collaboration with The Catholic Foundation's awareness and service initiatives. Tom does just that and more. He works with Monsignor Moloney to help plan informational gatherings and he's always happy to talk to fellow parishioners about St. Andrew's parish endowment as well as invite others to serve as a St. John Fisher Steward. The more people within a parish who can be a reliable source of information the better.

Being a St. John Fisher Steward is a role Tom holds in high regards. His wish is for every parish in the Diocese of Columbus to have at least one St. John Fisher Steward. When he's not volunteering at St. Andrew's, Tom enjoys time with his wife, May Lou, whom he's known since childhood. Five children, eight grandchildren and six great grandchildren keep him forever young and appreciating God's many blessings. The Catholic Foundation extends a heartfelt thank you to Tom and all the St. John Fisher Stewards who work to promote their parish's endowment funds within their faith community.

If you would like more information on becoming a member of the St. John Fisher Stewards, please contact Scott Hartman at shartman@catholic-foundation.org or 614-443-8893.



ST. MARTHA GIVING CIRCLE THE CATHOLIC FOUNDATION

The Catholic Foundation is looking forward to another inspiring year with The Marthas. The St. Martha Giving Circle (affectionately known as The Marthas) is an initiative dedicated to bringing Catholic women together to raise awareness and funds for organizations in the Diocese of Columbus. It's also a great way to meet other women who share a common thread of faith and stewardship.

To learn more about this impactful group or becoming a member, please visit www.catholic-foundation.org/themarthas

SAVE THE DATES!

- New Charities Forum: April 7
- Charity Nominations: May 9-13
- Grant Voting: May 23-27
- Awards Dinner for Grant Winners: June 9
- Mother & Daughter Tea Party: July 9