



A LETTER FROM THE CEO

DEAR FRIENDS,

The theme of this year's Annual Report is "Our Journey to Home". Upon hearing this, I was instantly reminded of a song by Bobby Pinson, Trent Tomlinson, and Vicky McGehee:

*It's the path you take
The steps you make
That make you who you are
It's the life you live
The gifts you give
The love that's in your heart
Just try to do the best you can
To be a better man
You don't have to walk on water
It's how you walk on land*

As Catholics we are called to a greater and more important purpose; to be reunited with our Father in Heaven. Heaven is our final goal and our ultimate destination. Everyone is born into this life with their own unique perspective, their own thoughts and feelings, their own gifts and talents, and their own way of doing things. Each path taken is different for each of us because of those unique elements and we are all trying to do the best we can. For many of us there are pit stops, there are detours, there are lost directions, forgotten turns, and roads we should have traveled. But we are also met with friendly advice from people that help us when we lose our way, the scriptures and faith to direct us when we get lost or lose hope, and the Holy Spirit to guide us on our journey home.

In this annual report you will read the different paths people have taken during different stages of their life, with their unique gifts, all with the purpose of one day walking with Jesus. These stories represent the very best but also the very relatable walks of life that we hope inspire you to do the same. Most people don't understand the great potential and gifts they possess to help build and sustain our Catholic faith. I ask that you read each story and connect with the people who decided to share their journey. See how you can relate to their stories, their willingness to give, and their determination to make our Catholic faith and community stronger.

Pope Francis said, "Always remember this: Life is a journey. It is a path, a journey to meet Jesus." We all take different paths in our lives that take us on different journeys and adventures. At The Catholic Foundation, we are here to ensure that your intentions and wishes are met. We can create a custom, charitable plan that is carried out in a way that fits your goals and needs at whatever stage you are at in your journey. If you have a parish, a school, or a favorite cause that has influenced your life and you want to know how you can strengthen and secure their future, then please have a conversation with us.

In Christ,

Loren P. Brown
President & CEO



OUR MISSION

In Christ, The Catholic Foundation inspires giving and assists donors to provide for the long-term needs of the Diocese of Columbus.

OUR FOUR PILLARS

The Catholic Foundation focuses its funding in four pillars of our Catholic faith: **Parish Life**, **Catholic Education & Faith Formation**, **Social Services** and **Vocations**.

KEEPING THE FAITH

The Catholic Foundation is the only foundation in the Diocese of Columbus that invests your gifts in alignment with the teachings of the Catholic Church. Our portfolios follow the United States Conference of Catholic Bishops investment policies, and we carefully screen all charitable organizations that we fund to make sure they also follow Catholic teachings.

A LETTER FROM OUR BISHOP

I am very pleased to be writing my first letter for The Catholic Foundation's annual report. I am in awe by the faith-filled people who have expressed their charity and their thanks through their unselfish giving of time, resources, and talent. I pray that you will be encouraged and even inspired by the good works that are being accomplished through the generosity of the Foundation's many donors. Every individual has made a difference in the lives of others by listening to Jesus's call to not only live the faith deeply but to share it abundantly.

Our life should be spent as a journey towards heaven. The road goes out before us and our eternal destination awaits. Jesus remembered where He was headed, and He wanted to get there with all His heart. Faith and our actions keep us on our journey to heaven for that is the only story worth living.

To all those who gave of themselves... Thank You! To those of us inspired, please see all the ways that you too can make a difference. The opportunity to express your faith with a planned gift to your parish community, school, or favorite ministry is more accessible than ever when you work with The Catholic Foundation. You can bring, not only hope, but change to our Catholic community.

I am truly blessed to serve as your Bishop, and I am very proud of the work we have already accomplished and will accomplish on the journey ahead.

May God continue to bless and keep you,

Bishop Robert Brennan
Catholic Diocese of Columbus



LIFE IS A
JOURNEY.
IT IS A
PATH, A
JOURNEY
TO MEET
JESUS.

2019 SNAPSHOT

GRANTS

\$14,536,148

TOTAL AMOUNT

BY PILLAR

\$6,698,324

PARISH LIFE

\$4,922,730

EDUCATION

\$2,187,991

SOCIAL SERVICE

\$727,103

VOCATIONS

BY TYPE

\$8,344,848

DONOR ADVISED FUND

\$4,703,140

ENDOWMENT

\$1,194,152

RESPONSIVE GRANT

\$225,508

SCHOLARSHIP

\$45,000

ST. MARTHA GIVING CIRCLE

\$16,000

AMAZING PARISH

\$7,500

BRIDGE THE GAP

2,067

TOTAL GRANTS

BY TYPE

732

PARISH LIFE

681

EDUCATION

484

SOCIAL SERVICE

170

VOCATIONS

BY TYPE

1,435

DONOR ADVISED FUND

474

ENDOWMENT

115

RESPONSIVE GRANT

23

SCHOLARSHIP

10

ST. MARTHA GIVING CIRCLE

8

AMAZING PARISH

2

BRIDGE THE GAP

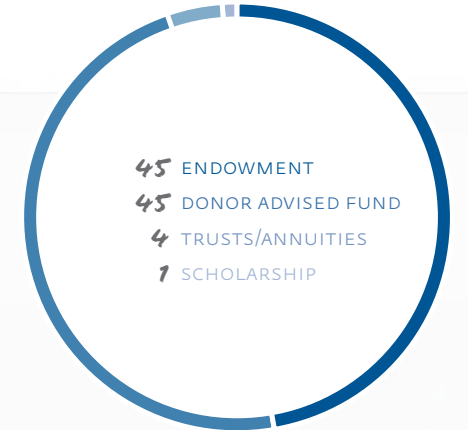
95

NEW FUNDS OPENED

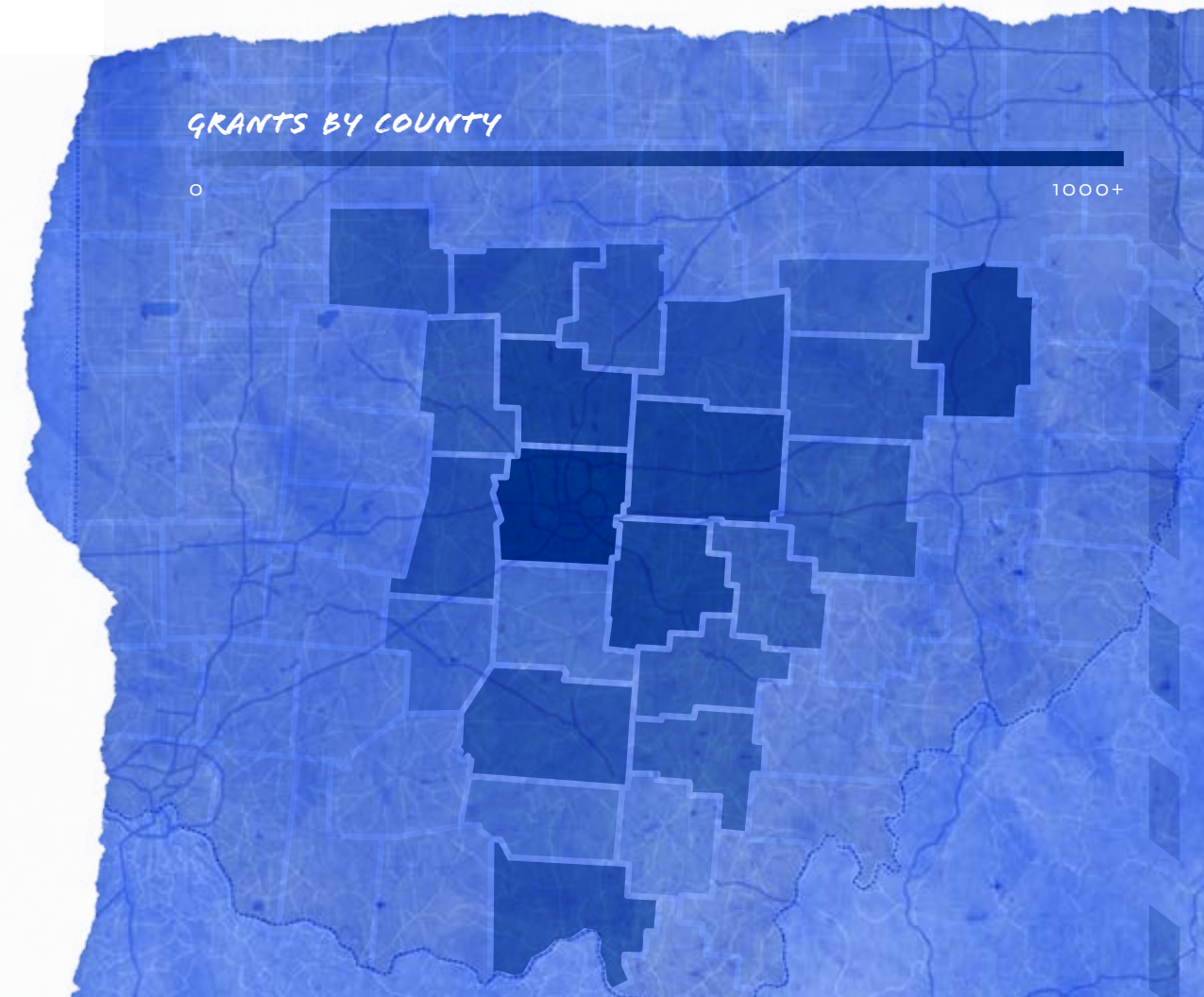
BY PILLAR



BY TYPE



GRANTS BY COUNTY



ST. FRANCIS DE SALES VOCATIONS CULTURE PROGRAM

St. Francis de Sales, in Newark Ohio, is a K-8 school in the Catholic Diocese of Columbus. Their mission is to create a loving and caring Catholic community that uses education to support all children in becoming the best they can be in mind, body, and spirit. Sally Mummey, the school principal, and Fr. David Sizemore, Pastor, are committed to a well-rounded education for their students including the area of vocations.

Maggie Wright, St. Francis' Director of Finance & Development, applied for and was awarded a grant from The Catholic Foundation to create and execute a Vocations Culture Program. This program, which fits within St. Francis de Sales' mission to 'Make Disciples and Disciple Makers', uses promotional materials and books to cultivate awareness of Vocations in families and school-age youth. To create a culture of Vocations awareness among younger children and families, the books are read to children in class by a Priest, Deacon, Seminarian, or other Religious. Information is also sent home with the children to aid in family discussion. To foster the Vocations Culture among young men in the parish, St. Francis de Sales hosts a vocations study led by the Parish Priest and Youth Minister, using the free materials from the Melchizedek Project. The Melchizedek Project educates and inspires Catholic students to consider a vocation to the priesthood. Saint Francis also offers two retreats for Vocations discernment in the Spring and Summer. The first was for young men under 18 held at Damascus Camp. The retreat included Mass, Confession, Liturgy of the Hours, talks, breakout sessions, leisure and team building activities, and more. The second was a Canoeing/Camping retreat for men 18 years of age and older. Activities on the Canoeing Retreat included daily Mass, Liturgy of the Hours, Study, Quiet Reflection, and time for bonding while canoeing down the Muskingum River.

Dan Kurth, VP of Grants at The Catholic Foundation said, "St. Francis de Sales has been a long-standing pillar of faith in the Licking County community. The Catholic Foundation is proud to help support a parish which has produced so many priests in our Diocese. St. Francis de Sales' Vocation Culture project is aiming to increase awareness among families about vocations and generate a discussion around the dinner table. We are very excited that a parish has decided to put such an enormous emphasis on vocations and are hopeful that these efforts will produce great results."

The key to this program is to expose families to religious life, as St. Francis has many students who have never met a sister and don't understand what it means or how to go about discerning religious life. Recognizing the disconnect between families hearing about Vocations in a book and seeing it living in front of you, St. Francis' has set its goals based on individual and family involvement. The primary goal is to have a minimum of 45 young men participate in the study discerning the priesthood. The secondary goal is to get 50% of all school families to make a commitment to pray for Vocations in their families and/or the parish. Maggie said, "We hope to create a strong culture of vocations within St. Francis de Sales for the greater good of the Church. We want

to help in any way we can to increase vocations to the Catholic priesthood by fostering awareness and education in our youth."

Statistics demonstrate the relevance and importance of St. Francis' Vocations program. In the Diocese of Columbus, we have 278,528 active Catholics and only 97 diocesan priests, 36 religious priests, and 23 external priests to serve them. That is only one priest per 1,785 Catholics. Additionally, there are only 35 seminarians currently in formation and statistically only ¼ of those will make it to ordination. This program is therefore essential to increase vocations and to actively feed the faith and serve the good people of the Diocese of Columbus.

This program is only one example of the strong partnership between St. Francis and the Foundation. Maggie said "The Catholic Foundation has been instrumental in the development of St. Francis de Sales. At one point, we were seeing a decline in membership, in the offertory, and we had no programming or ministries around adult faith formation. The Catholic Foundation worked with us to put together a plan for growth and they have been instrumental to that growth." And it's working! St. Francis de Sales has gone from a declining offertory of \$700,000 to well over a million, a 900 mass count to that of almost 1,200, and the school has grown from 242 to 270 students. Families and parishioners are returning home as St. Francis continues to work every day to help grow the already-strong Catholic community in Licking County.

IF YOU ARE INTERESTED IN LEARNING MORE ABOUT HOW YOU CAN SUPPORT ST. FRANCIS DE SALES OR YOUR CATHOLIC SCHOOL, CONTACT OUR DEVELOPMENT TEAM AT 614-443-8893 OR VISIT WWW.CATHOLIC-FOUNDATION.ORG.



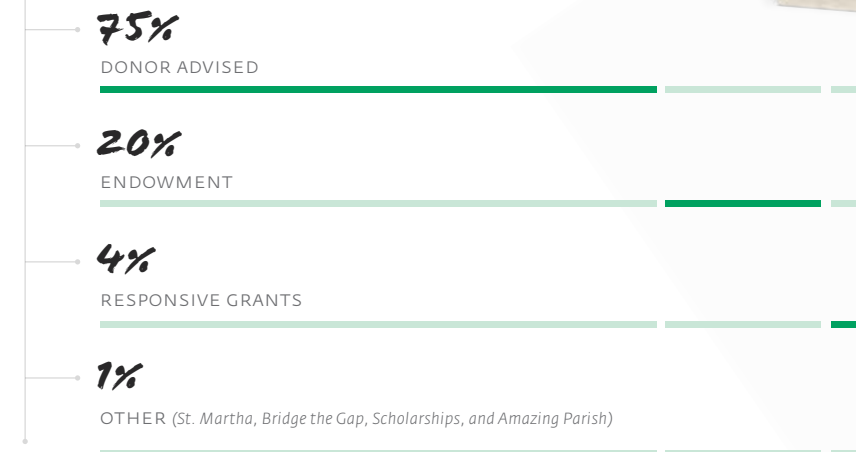
BY THE NUMBERS

170

TOTAL VOCATIONS GRANTS AWARDED

\$727,103

TOTAL AMOUNT



ST. VINCENT FAMILY CENTER

On February 2, 1875, the original St. Vincent Orphanage began caring for 8 young children, displaced from their families with no place to call home. More than 140 years later, the mission, now named the St. Vincent Family Center has evolved into a comprehensive behavioral health agency it is today, meeting the changing needs of over 5,000 children and families a year. St. Vincent Family Center offers a unique, trauma-informed approach to behavioral health treatment, supporting entire families as they heal from life's challenges.

The Catholic Foundation is proud to partner with the team of the St. Vincent Family Center to support the ongoing needs of underserved children and families in our central Ohio community. The roots of St. Vincent Family Center run deep on the near east side of Columbus, and just like their little ones, sometimes they need a little extra care. The Catholic Foundation was instrumental in funding two mission-critical projects at St. Vincent Family Center in 2018 – a vital boiler repair and a transformation initiative to update information technology (IT) systems. The building's boiler replacement not only provided necessary upgrades to the agency's campus, it also ensured hundreds of children remained safe and warm inside St. Vincent Family Center during the cold winter months. "A working boiler system is critical to our everyday service delivery," shares St. Vincent Family Center President and CEO Susan Lewis Kaylor. "We provide essential healthcare programs to more than 200 at-risk youth in our building every day – residents, students and family clients. We are so grateful for the immediate response of The Catholic Foundation during our time of need, providing critical support toward this unexpected financial burden."

The Catholic Foundation also provided \$48,000 in seed money to fund Phase 1 of St. Vincent Family Center's IT transformation efforts, an initiative dedicated to increasing access to care for needy families and improving program efficiencies. "Early support from The Catholic Foundation financed the first steps we needed to create a foundation for safe and secure IT systems," says Kaylor. "The Catholic Foundation believed in our strategy from the beginning, and we could not have achieved initial success without the faith and investment they demonstrated." St. Vincent Family Center continues to advance their IT operations and efficiencies thanks to this critical early investment from The Catholic Foundation.

The mission of St. Vincent Family Center is simply put – "We Make Good Kids Better." Each of these projects is rooted in that very mission, ensuring more children in desperate need of hope and support are cared for safely at St. Vincent Family Center. And the results are clear. Parents and families shared these sentiments about their experience at St. Vincent Family Center:

"The facility lives up to its name – they're all about family and children, helping you and your children to become better than you were before."

"The team at St. Vincent Family Center is very professional and courteous, they treat me and my son with dignity and respect."

"I absolutely appreciate St. Vincent Family Center. They were a true backbone for me, understanding myself and my son. I appreciate their kindness, they are so helpful to my family!"

The work at St. Vincent Family Center is essential and meaningful to so many families across central Ohio, and The Catholic Foundation is honored to support the mission and vision of this dynamic organization.

"THE CHILDREN SERVED AT THE ST. VINCENT FAMILY CENTER DESERVE OUR LOVE AND CARE. THEY DID NOT ASK FOR THEIR CIRCUMSTANCES, SO WE NEED TO SUPPORT THEM. WE WANT THEM TO HAVE EVERY OPPORTUNITY. I ENCOURAGE OUR CATHOLIC COMMUNITY TO LEARN ABOUT WAYS TO SUPPORT THE ST. VINCENT FAMILY CENTER."

SUSAN LEWIS KAYLOR

IF YOU ARE INTERESTED IN SUPPORTING ST. VINCENT FAMILY CENTER AND CONTRIBUTING TO THEIR FUND, PLEASE VISIT WWW.CATHOLIC-FOUNDATION.ORG/SVFCEF.

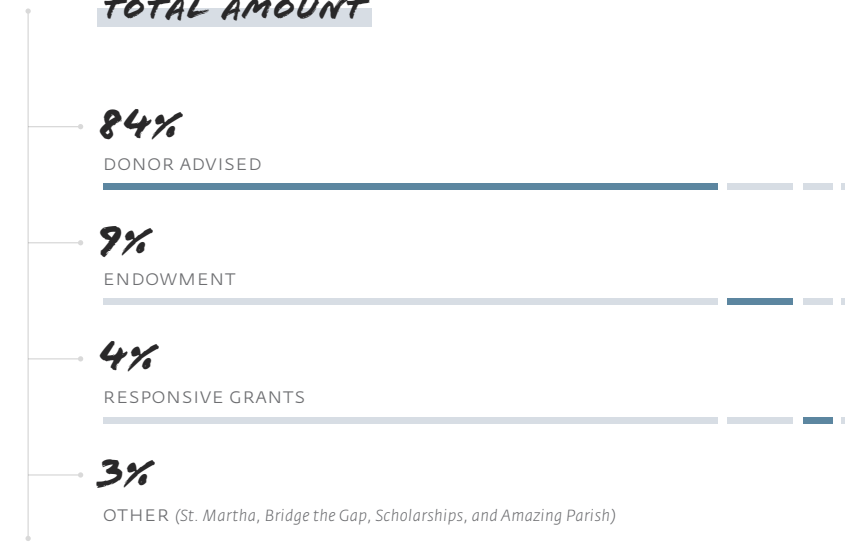
BY THE NUMBERS

484

TOTAL SOCIAL SERVICE GRANTS AWARDED

\$2,187,991

TOTAL AMOUNT



ST. CECILIA'S CULTURAL DIVERSITY SPECIALIST

Saint Cecilia Parish is located on the west side of Columbus, Ohio and has over 1,100 families in a thirty-one square mile territory. The parish's elementary school accommodates girls and boys of all races and faiths as long as the families honestly support the educational program and expression of the Catholic faith. Students at St. Cecilia learn in a warm and risk-free environment where they are empowered to be independent critical thinkers who strive to make positive differences in their community. Students develop as caring and responsible citizens by learning and practicing the Catholic faith through weekly mass, daily religion class, receiving the sacraments, and taking part in prayer services. By working closely with the parish, St. Cecilia School promotes life-long learning of the Catholic faith and an ongoing relationship with God.

The principal of St. Cecilia, Lori Smith, was thrilled to learn that they were just ending their first year of a three-year grant from The Catholic Foundation for the school's Cultural Diversity Specialist. The person who originally had the job accepted another job elsewhere and Lori had the opportunity to apply her vision to this position. She knew that she wanted someone that had a strong presence in the Latino community, and she knew this person would need to work with a diverse group of families from Mexico, Ecuador, Peru, El Salvador, Dominican Republic, Honduras, Nicaragua, and Venezuela. Laura Kreber heard about the position and spoke with Lori and immediately knew it was the perfect fit. Facing a huge undertaking, Laura immediately instilled trust and affection with her warm and welcoming personality in her new role as a community liaison. Watching Laura grow and flourish in this position, Lori knew she made the right decision. Lori said that the school is already at 49 Latino families and, because the word is spreading of Laura's work, they are receiving daily phone calls for more information.

Laura has been the Cultural Diversity Specialist at St. Cecilia for almost two years now. Laura says, "It has been wonderful to help the families and students at St. Cecilia and be the bridge between the school, the parish, and the families. When Latino families show up and there are language barriers, I help explain what services they need. These can also be sacramental needs and when that happens, I can explain to Father the cultural differences so he can be sensitive and aware of them." Laura also translates all communications that go home with the students and addresses any questions, comments, and concerns that students may have that can't be expressed in English. A growing issue, due to ever-increasing and changing immigration regulations, is the amount of paperwork that Latino families are required to fill out and file. Laura walks families through the process and helps them understand how to fill out the required paperwork. "It can be heartbreaking sometimes to see because they want to do things right and legally but are oftentimes confused and don't understand what is required of them," said Laura.

In the summer of 2019, a handful of St. Cecilia employees, including Laura, Lori, and Father Leo Connolly, participated in the Latino Enrollment Institute (LEI) classes offered through Notre Dame. National data suggests that Latinos are both the fastest-growing segment of

the U.S. Catholic Church and the most underserved by Catholic schools. In response to these findings, The University of Notre Dame's Catholic School Advantage program founded LEI in 2012. This initiative identifies and assists Catholic schools with substantial unmet capacity (open seats), favorable demographic potential—namely, a growing number of Latino families in the surrounding area—and motivated principals by offering a framework to transform schools in order to attract and serve Latino families. Father Connolly, especially, fell in love with this program and the resources they received on how to make St. Cecilia Parish and School a warm and welcoming environment for everyone.

When asked how it was working with The Catholic Foundation and going through the grant process, Lori said "The grant process has been very easy. I thought it was very straightforward and easy. And because the Foundation asked for a narrative as part of their grant application it worked out well as we were able to explain the need and the intent behind this position. Dan Kurth is wonderful, helpful, and always accessible. Additionally, the grants training workshops were very helpful in figuring out the best way to apply and walking us through the process as a whole. We are extremely grateful to the Foundation and all the donors."

IF YOU ARE INTERESTED IN SUPPORTING ST. CECILIA, PLEASE VISIT WWW.CATHOLIC-FOUNDATION.ORG/STCECILIA



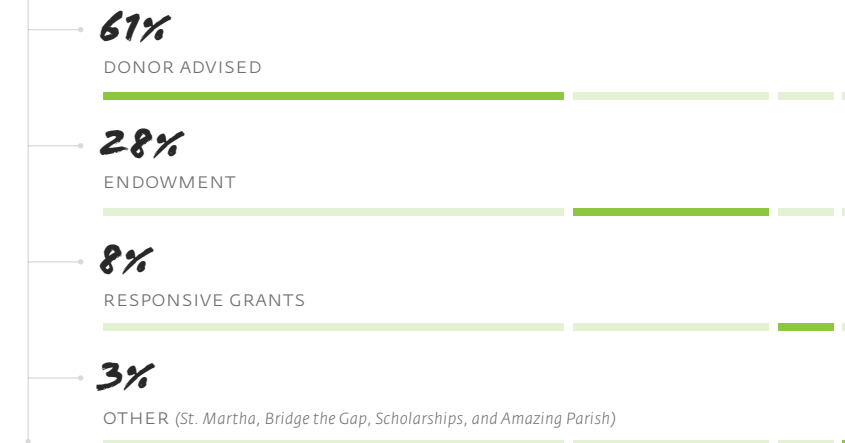
LAURA KREBER, LORI SMITH, AND FATHER LEO CONNOLLY



BY THE NUMBERS

681
TOTAL EDUCATION GRANTS AWARDED

\$4,922,730
TOTAL AMOUNT



ST. THOMAS AQUINAS PARISH

The historic St. Thomas Aquinas Church in Zanesville, Ohio was built in 1842 and added to the National Historic Registry in 1980. The parish was under the pastoral care of the Dominican Fathers until August 2017 and is now administered by the clergy of the Diocese of Columbus. The new pastor of Saint Thomas Aquinas, Father Jan Sullivan, was born in Columbus and grew up on the far Eastside near Reynoldsburg, in Saint Pius X Parish. He was ordained a Priest by Bishop Griffin in June 1991 and has 19 years of experience as a Parish Priest: at Saint Colman of Cloyne in Washington Court House, Saint Francis de Sales in Newark, and now at Saint Thomas Aquinas.

When Father Sullivan was appointed pastor of Saint Thomas, he worked with the church's finance committee (Tom Barone, Michael Morris, Ruth Ann Lynn, and Brent Mirgon) to look at the resources of the parish and see how to be a good steward of the parish's resources entrusted in his care. Father Sullivan said, "I have personally witnessed the benefit of being associated with The Catholic Foundation during my time at other parishes through the grants we received to fund parish ministries and to help finance capital repairs and improvements. Even now, St. Thomas has a grant from The Catholic Foundation to help fund an integrated parish CCD and Youth ministry program. I know of their work and it was a logical conclusion to see how the Foundation could assist us in securing our financial resources for future benefits and ministries."

Saint Thomas' experience with investing parish funds began about thirty years ago when a devout and loyal parishioner left a very large bequest to the parish. She had a humble and quiet life working as a laundress for most of her adult life and it wasn't until she died that Saint Thomas was informed she left an \$800,000 estate gift to the parish. Father Sullivan said he felt he owed it to loyal and faithful donors, like these, to steward and manage the money that they had worked hard to save their entire lives in accordance with their wishes.

To insure the parish was in compliance with policies of the Diocese of Columbus regarding parish investments Father Sullivan spoke with Loren Brown, President and CEO at The Catholic Foundation, to find a win-win situation where Saint Thomas could take advantage of the Foundation's Professional Advisor Choice Program and implement the long standing diocesan financial policy. St. Thomas would move their long-term investments to The Catholic Foundation while maintaining a relationship with a local investment manager. Not only was Father Sullivan, and the parish finance committee happy with the solution, but the local investment firm was also appreciative and collaborated in making this transition, because it allowed the firm to offer their client (Saint Thomas) a continued level of commitment and service. Loren Brown said, "I am happy that we were able to help Father Sullivan and Saint Thomas Aquinas parish. This is really important to them."



An Endowment Fund provides a source of annual income to a Catholic organization of your choice, like St. Thomas Aquinas. This fund is designed to function in perpetuity, making it possible for you to ensure long-term financial support. Once established, anyone can make additional contributions to the fund in any dollar amount.

Now that Saint Thomas' investment funds are being overseen by The Catholic Foundation, Father Sullivan is working to educate the parish on planned giving options and its crucial impact on St. Thomas' future sustainability. Fr. Sullivan will begin a series of meetings and gatherings over the next year informing parishioners on how they too can continue supporting St. Thomas through its Endowment Fund at the Foundation to ensure its future even after they have gone to their eternal reward. Father Sullivan said, "I have always found The Catholic Foundation and Loren to be very helpful. In all my meetings with him over the past seven years he has been very supportive of me and my pastoral responsibilities and helped me to look for ways the Foundation can help in any particular situation."

IF YOU ARE INTERESTED IN CREATING YOUR OWN ENDOWMENT FUND OR SUPPORTING YOUR PARISH WITH A PLANNED GIFT, PLEASE CONTACT SCOTT HARTMAN AT SHARTMAN@CATHOLIC-FOUNDATION.ORG OR VISIT WWW.CATHOLIC-FOUNDATION.ORG.

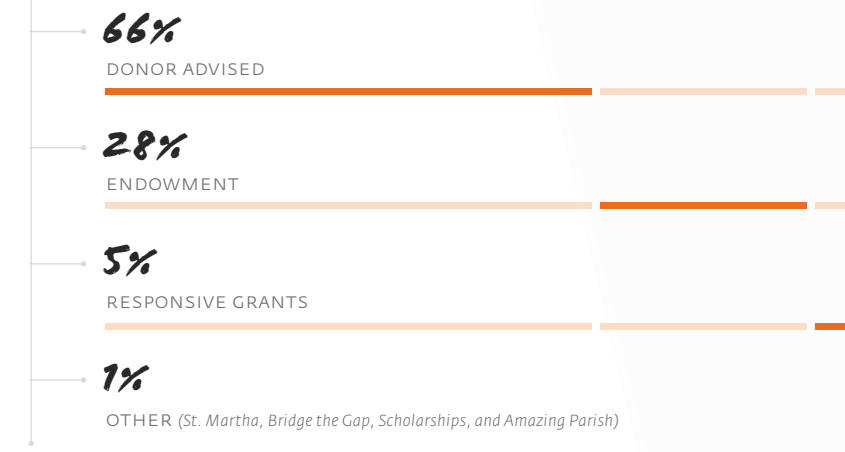
BY THE NUMBERS

732

TOTAL PARISH LIFE GRANTS AWARDED

\$6,698,324

TOTAL AMOUNT





THE MARTHAS

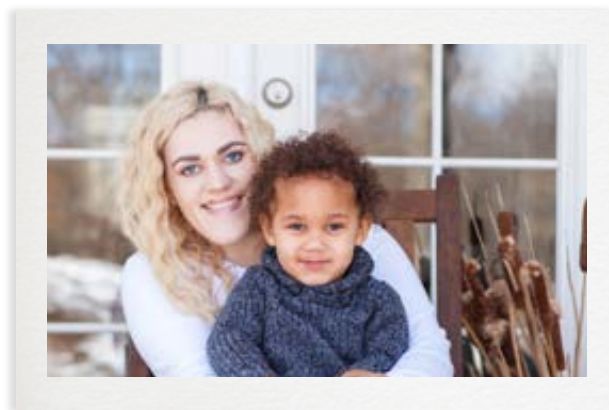
The St. Martha Giving Circle, better known as The Marthas, was established in 2014 as an initiative dedicated to bringing Catholic women together to raise awareness and funds for organizations in the Diocese of Columbus. A giving circle by design, The Marthas leverage a pooled fund to have a greater philanthropic impact on selected organizations.

Throughout the year, The Marthas gather to learn about organizations and their needs and decide together which projects to financially support. There are also opportunities to share ideas, serve with one another, grow deeper in the Catholic faith, socialize, and learn about the ongoing needs throughout the Diocese. Every Spring, The Marthas nominate, vote, and award money from their donor advised fund to organizations in the Diocese of Columbus. Each organization is vetted by The Catholic Foundation's VP of Grants and Community Impact to ensure that they are in alignment with Catholic values and beliefs.

This past year, The Marthas awarded \$45,000 to ten amazing organizations, including Mommies Matter. Mommies Matter empowers single mothers to choose life for their babies by breaking down their barriers. As an extension of pregnancy care services, Mommies Matter walks with single mothers through their pregnancies and until their babies are 18 months old by offering a variety of services and support. Every woman is a gift to her child and, as such, Mommies Matter offers each mother a **GIFT**; Group support, Individualized assistance, Financial assistance, and Therapy.

Executive Director, Monica Flynn, was one of The Marthas' panelist speakers in March 2019. Monica said she has seen a

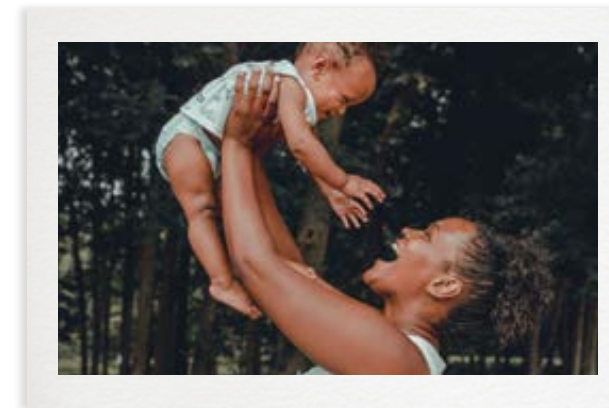
lot of positive feedback in both donations and in volunteers after her presentation. "There has been a residual effect of people reaching out wanting to get involved and support these brave and wonderful women in their journey." It's obvious that Monica and Mommies Matter has also had an impact on The Marthas, as they were awarded the second highest grant of \$7,000. That \$7,000 is instrumental in administering the services that Mommies Matter provides to hundreds of women in central Ohio. There have been over 6,000 volunteer hours since last September and with that comes increased personnel time and resources. The Marthas' grant has provided many services including helping a young woman buy a car, drivers education classes, and the hiring of two new part-time personnel. "Beyond the emotional and physical needs of a mother there are very real-life, tangible things that need to be addressed in order for them to succeed...such as reliable transportation. And support, like this grant helps make that possible," said Monica.



The volunteers and staff members of Mommies Matter are committed to building deep, and oftentimes, ongoing, relationships with these brave women. This is the heart behind Mommies Matter's belief that "it's the difference between giving birth and giving life". The hope of Mommies Matter is that these very relationships awaken the desire for other life-giving relationships in the individual's life." Monica said, "We look forward to the next part of their journey, helping them see that whatever past decisions or traumas they experienced do not define them but rather made them who they are today. We go through life together. Healing and moving towards Christ."

Monica said, "The Marthas and The Catholic Foundation continually support organizations like ours and it's genuine. They really do want to make our community a better place and put our Catholic faith into action."

IF YOU ARE INTERESTED IN SUPPORTING MOMMIES MATTER YOU CAN GIVE TO THEIR DONOR ADVISED FUND BY VISITING WWW.CATHOLIC-FOUNDATION.ORG/DONATETOMOMMIESMATTER.



BY THE NUMBERS

104
ACTIVE MEMBERS

52
TOTAL FOUNDERS
GIFTS OF \$1,000 OR MORE

\$45,000
TOTAL AMOUNT

10
GRANTS AWARDED

GRANTS

\$10,000	STAR HOUSE
\$7,000	MOMMIES MATTER
\$5,000	WOMEN'S CARE CENTER
\$5,000	CRISTO REY HIGH SCHOOL
\$5,000	CHRIST CHILD SOCIETY
\$5,000	ST. FRANCIS EVANGELIZATION CENTER
\$3,000	ST. VINCENT FAMILY CENTER
\$3,000	J.O.I.N.
\$1,000	DOMINICAN LEARNING CENTER
\$1,000	KAIROS PRISON MINISTRY OF OHIO



ACTIVE MARTHA MEMBERS

Mary Ann Abrams
Phyllis Allmacher
Mary Anderson
Marjo Angelo
Mary Barcza
Rita Bauer
Ruth Beckman
Pamela Beech
Keli Beecroft
Sharon Bockus
Venetia Bramlage
G. Jeanne Braxton
Barbara Bringardner
Martha Brinkman
Stacey Brown
Kim Brown
Barbara Burke
Jo Ann Carpenter

Deborah Coleman
Erin Cordle
Lori Cunningham
Elaine Damo
Rose Deffet
Bridgit Denz
Mary Dodd
Erin Dougherty
Maria Elliott
Molly Fanning
Frances Feehan
Monica Flynn
Lauren Fromme
Sherry Gardiner
Kristine Gehring
Kathleen Gibbons
Carol Gillespie
Stephanie Glover

Sarah Gray
Elizabeth Gregg
Lauren Gresh
Mary Halas
Lori Hamrock
Michele Hansen
Alice Heller
Monica Henry
Brandi Hoffman
Nichol Hohman
Maura Holowchak
Joan Hoy
Nancy Hutchings
Dolores Igel
Brenda Jordan
Stephanie Jursek
Kathleen Kohler
Karen Laih

Teresa Lewandowski
Susan Lewis
Rachel Lustig
Nancy Madrid
Leslie Mahle
Brenda Martinez
Nikki Mesnard
Cheryl Muetzel
Barbara Murphy
Julie Naporano
Tara Nemcik
Kelly Noll
Pam Nuss
Kimberly Owens
Kathleen Paolini
Gail Perks
Deborah Perrin
Rosemary Pomeroy

Marilyn Pongonis
Maureen Preston
Rebecca Princehorn
Stephanie Rapp
Lisa Reis
Patricia Reynolds
Angie Robbins
Amy Roberts
Elizabeth Rothermich
Barbara Rowland
Mary Ginn Ryan
Patricia Ryan
Connie Sauter
Kathy Scanlon
Jeanne Scanlon *
Joan Schlagheck
Janet Schubert
Marian Schuda

Kris Shade
Virginia Shaffer
Veronica Sherman
Christina Steffy
Lynn Thomas
Carolyn Thurn
Marianne Traficant
Amy Varacalli
Jo Anne Welsh
Ginger West
Jo Ann Wilson
Kellyn Wilson
Leslie Wolf
Linda Younklin

* Deceased

PROFESSIONAL ADVISORY GROUP

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ACTIVE MEMBERS



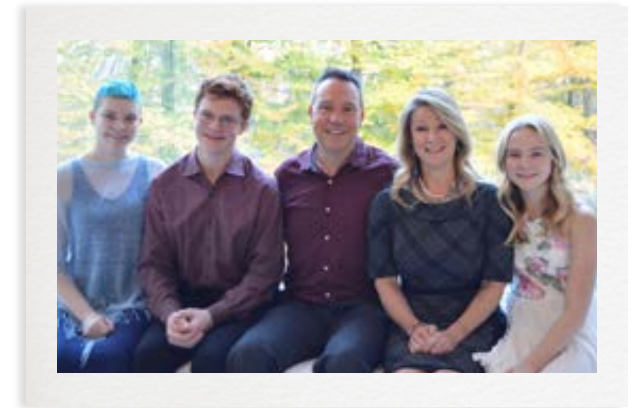
Chris said, "My family and I have been fortunate enough to be in a position where we can make donations to worthy causes and I would like to incorporate my children in this concept. I started with The Catholic Foundation DAF because I want to instill my Catholic values and philanthropy system, into my kids." About nine years ago Chris started a tradition with his children where they would sit down at the table at Thanksgiving and everyone would say what they were thankful for. Additionally, he and his wife gave each of them \$50. They were told to pick a charity, do research on that group, address the envelope, and mail the check. The tradition was so well loved they have done it every year since and the amount has been bumped up to \$100. Not only did this tradition get the children excited, but it started instilling in them the values and importance of philanthropy and what it means to give back. It can be very easy to get lost in day-to-day survival mode, and it was important to Chris and his family that they take a step back, look at the bigger picture, and remember that we are all working our way towards a

The Catholic Foundation's Professional Advisors Group (PAG) is comprised of trusted professionals including estate planning lawyers, financial planners, insurance professionals, accountants, funeral directors, and trust officers. Additionally, for those individuals who feel called to partner with the Foundation to make a gift to charity aligned with Catholic values and beliefs, but wish to retain their existing financial advisor, The Catholic Foundation offers the Professional Advisor Choice program. In this program the financial advisor continues to manage contributed funds but are required to invest in predetermined mutual funds that comply with The Catholic Foundation's Investment Policy. This program begins with contributions at \$50,000 or above, including in-kind conversions.

Chris Doyle, First Vice President and Wealth Management Advisor for Merrill Lynch contacted The Catholic Foundation shortly before Christmas 2018 to inquire about the Foundation's Donor Advised Funds (DAF) service and whether the Foundation offered an advisors choice program. As an advisor himself, having this option available was important to Chris personally. But it was also important to Chris professionally, because his clients trust him to take care of all their financial needs, understand their goals, and recommend appropriate solutions, including their charitable giving. Chris said, "People are in different stages of their lives at any given time and that usually requires a more sophisticated solution to solve their financial needs and the Advisor Choice Program accomplishes that goal". After a few meetings with David Clark, Development Officer, and Loren Brown, President & CEO, Chris knew that he wanted his family's Donor Advised Fund to be at The Catholic Foundation.

greater purpose and destination. The Catholic Foundation enabled the Doyle family to have multiple generations run the fund and truly make it a fund rooted in faith and family.

Chris said, "Working with David has been terrific. The Catholic Foundation has excellent people who will work together with an advisor. It always comes down to people when selecting a partner and The Catholic Foundation is a reliable and trustworthy partner. The Professional Advisor Choice program is a terrific solution for a very specific situation that many families deal with later in their financial lives. The combination of The Catholic Foundation's resources aligned with the Wealth Management Advisor's expertise results in a great solution for the client!"



CHRIS DOYLE AND FAMILY

IF YOU ARE INTERESTED IN JOINING THE PROFESSIONAL ADVISORS GROUP EMAIL SCOTT HARTMAN AT SHARTMAN@CATHOLIC-FOUNDATION.ORG OR VISIT WWW.CATHOLIC-FOUNDATION.ORG/PAG.

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CHURCH OF THE
RESURRECTION

St. John Fisher
STEWARDS

ST. JOHN FISHER STEWARDS

Bishop Frederick Campbell identified St. John Fisher as the patron saint of The Catholic Foundation because of his stewardship of endowments, particularly St. John's College, England. The St. John Fisher Stewards are volunteers of the parish, that promote the growth of the parish endowments through collaboration with The Catholic Foundation's awareness and service initiatives. Some parishes such as Church of the Resurrection, New Albany have created their own ministry to promote their endowments and planned giving. The Foundation works with these ministries under the umbrella of the St. John Fisher Stewards program, which offers resources to help them promote, plan, and educate.

Resurrection's Legacy Society was established in 2018. It was formed to inspire giving and assist parishioners in providing for the long-term needs of the parish and the future sustainability of their ministries. This group primarily focuses on achieving these goals through legacy gifts to parish endowment funds managed in partnership by The Catholic Foundation. Partnering with the Foundation, the Legacy Society:

- **PROMOTES** legacy giving by recognizing parishioners and others who make a commitment to the future of Resurrection by making a Legacy Gift.
- **EDUCATES** the parish by visiting with parishioners and others who want to learn more about a long-term planned gift for Resurrection.
- **HELP WITH PLANNING**, to ensure that all donors' charitable giving needs are met.

In 1994, Bishop James A. Griffin offered to establish an endowment fund for 13 parishes with an initial deposit to each parish. Church of the Resurrection was one of the 13 parishes and \$1,000 was given to establish the "Church of the Resurrection Parish Endowment Fund". This fund provides for the general needs of the parish. The Church of the Resurrection endowment funds have grown to include:

- *Church of the Resurrection Music Ministry Endowment Fund*
- *Church of the Resurrection Social Concerns Ministry Endowment Fund*
- *Steele Family Endowment Fund*
- *Church of the Resurrection Capital Infrastructure Needs*
- *Church of the Resurrection Catholic Education Student Aid*

One Legacy Society member, Jim Vonau, said that working with The Catholic Foundation has been great because they don't have to reinvent the wheel. He said, "The Foundation has been great with helping steer us in different directions on what might work based on what has been done in the past with other parishes or groups."



One of the more successful initiatives of the Legacy Society began when the parish debt was paid and The Legacy Society approached donors who had generously given monthly to the campaign, asking them to consider continuing their contributions to one of their endowment funds. This has been incredibly successful and has helped grow Resurrection's funds by 63% in the past 18 months. Suzanne Larson, Business Manager for Resurrection said, "I've been at the parish for ten years and planning for the future is really important. We have done a really good job planning for our physical infrastructure and putting money away for projects. And the way I see it, Planned Giving is just another way of ensuring the future of our Church and our ministries."

The Legacy Society has future initiatives planned, including Information nights where parishioners will be educated on estate planning, funeral planning, and other ministries at Resurrection. While the Legacy Society starts these important conversations, The Catholic Foundation is a great partner that can step in and answer any questions parishioners might have regarding charitable giving. Jim said, "We have been really well received by many of the people. One person came up to me at the last gathering and told me how surprised they were at the many options available to them for planned giving – something they automatically assumed they couldn't do before. And it's getting better. People are slowly becoming more informed on the resources available to them and realizing what their own capacity is for giving."

TO LEARN MORE ABOUT HOW YOU CAN BECOME A ST. JOHN FISHER STEWARD FOR YOUR PARISH PLEASE CONTACT SCOTT HARTMAN AT SHARTMAN@CATHOLIC-FOUNDATION.ORG.

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STEWARDS

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Leonard W. Barbe, St. Peter, Columbus
Tom Barone, St. Thomas Aquinas, Zanesville
Roger A. Baughman, St. Michael, Worthington
James D. Bishop, St. Brigid of Kildare, Dublin
Daniel T. Burkhart, St. Mary, Marion
Mark A. Capuano, Holy Trinity, Zoar
Gregory M. Clements, Sacred Heart, New Philadelphia
David Collinsworth, St. Paul, Westerville
Mark Cooper, Ohio Dominican University
Robert L. Dawes, Church of the Resurrection, New Albany
Dominic L. Dematte, St. Paul's Outreach
Michelle Dougherty, St. Matthew, Gahanna
Ali Ernest, Blessed Sacrament, Newark
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Michael B. Haller, St. Mary, Chillicothe
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Michael Haughton, St. Vincent DePaul, Mount Vernon
Mark R. Hedge, St. Luke, Danville
Jeffrey S. Hedley, St. James the Less, Columbus
Gloria Horsley, St. Mary, Portsmouth
Thomas E. Kasberg, Our Lady of Peace, Columbus
Brian G. Kaufman, St. Ann, Dresden
Daniel P. Lacey, St. Peter, Columbus
Thomas A. Lynch, Sr., St. Andrew, Columbus
Anthony Mampieri, St. Pius, Reynoldsburg
Ralph J. Martinez, St. Joan of Arc, Powell
Julie A. Mattingly, St. Nicholas, Zanesville
Michael J. Melliore, St. Patrick, Columbus
William P. Messerly, St. Gabriel Catholic Radio
Cynthia Newberry, Community of Holy Rosary/St. John, Columbus
Kimberly T. Owens, Our Lady of Perpetual Help, Grove City
Matthew D. Palmer, St. Catharine, Columbus
Joseph J. Patrick Jr., St. Agatha, Columbus
Patricia Jackson, Our Lady of Victory, Columbus
Julie Moore, Pregnancy Decision Health Center
Stephen E. Proctor, St. John, Logan
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Christie Flood Weiner, Church of the Ascension, Johnstown
Jeff Willard, St. Ann, Dresden
Margaret Wright, St. Francis de Sales, Newark

KYRIE BEQUEST SOCIETY

375 MEMBERS

The Kyrie Bequest Society honors those who remember our catholic faith in their estate plans. The Catholic Foundation can help you build charitable giving into your estate plans to help you achieve tax advantages and leave an everlasting legacy to your parish, school or favorite Catholic ministry. Individuals often choose to designate a Catholic Foundation fund as the beneficiary of a will, life insurance plan, pension plan or retirement account (such as an IRA), or donor advised fund.

MEMBERS OF THE KYRIE BEQUEST SOCIETY GATHER ANNUALLY FOR MASS AND A LUNCHEON.

The mission of the Kyrie Bequest Society (KBS) is to recognize those individuals who have notified The Catholic Foundation of their plan to leave a future gift through a bequest, trust, life insurance policy, retirement plan, or charitable gift annuity through the Foundation. Specific parishes, schools, or organizations may be designated as beneficiaries.

Rachelle Martin is a new member to KBS but has been a friend to The Catholic Foundation for over ten years. When Rachelle served as Executive Director of Catholic Ministries, she worked closely with former Foundation President and CEO, Jennifer Damiano. Their friendship grew over the years and Rachelle helped Jennifer recruit Andrew Walker and Charles Rowan to the Foundation's Board of Trustees. It was Andrew Walker that first planted the seed of Rachelle opening an endowment fund at the Foundation and it has stuck with her ever since. To get an idea as to why Rachelle wanted to open an endowment fund, however, we will have to learn a little more about her journey.

Rachelle and her family converted to Catholicism when she was in the 4th grade. They became parishioners of St. Dominic parish in Columbus, Ohio and her mother was in the choir for over 25 years. Rachelle said that St. Dominic was one of the most welcoming and evangelistic churches she had ever experienced. Rachelle attributes much of her giving to her mother and how she was raised. Her mother instilled in her, and her sister, the path of love and charity, which helps her see the value of giving both her time and resources to her parish, St. Dominic. Rachelle has taken this to heart by establishing an endowment fund, which will be funded by her with a \$125,000 life insurance policy benefit.

In addition to St. Dominic, Rachelle named three other organizations that are very near and dear to her as annual

beneficiaries of the fund: Mother Angeline McCrory Manor, National Alliance on Mental Illness (NAMI), and the Dominican Sisters of Peace.

- Mother Angeline McCrory Manor is a not-for-profit facility that provides skilled nursing services and spiritual care in a safe and home-like environment. The focus is on each resident's medical needs and the enhancement of their quality of life. Rachelle's mother has Alzheimer's and is currently a Manor resident. "They are truly amazing and wonderful with my mother. They take excellent care of her and they love her like I love her," said Rachelle.
- NAMI is an advocacy group originally founded as a grassroots group by family members of people diagnosed with mental illness. NAMI identifies its mission as being "dedicated to building better lives for the millions of Americans affected by mental illness". Rachelle has been the Executive Director at NAMI for over ten years. She said, "It is an amazing organization. We help people who are living with a mental illness and their families. There are 13 staff members that work with me at NAMI and they are some of the most amazing and inspiring individuals. There isn't a day that goes by where we don't touch other people's lives...their souls."
- Dominican Sisters of Peace is a congregation of Catholic Dominicans with about 600 Sisters and 500 Associates living and serving in 37 states and in eight additional countries. Rachelle says she accidentally came upon them when a friend recommended her as a volunteer to lector for the nuns at Mohun health care, which she has done on a monthly basis for the past five years.

Rachelle worked with Scott Hartman, VP of Development, to create a plan that fit this stage of her journey and encompassed all of the causes she cared most about. Rachelle said, "I think one of the most important things for me during this process was the trust I had in The Catholic Foundation. I trust that the money I have to give will be invested and handled with respect and is in alignment with the faith that has guided me my whole life."

IF YOU ARE INTERESTED IN LEARNING MORE ABOUT BECOMING A MEMBER OF THE FOUNDATION'S KYRIE BEQUEST SOCIETY, PLEASE EMAIL SCOTT HARTMAN AT SHARTMAN@CATHOLIC-FOUNDATION.ORG OR VISIT WWW.CATHOLIC-FOUNDATION.ORG/KBS.

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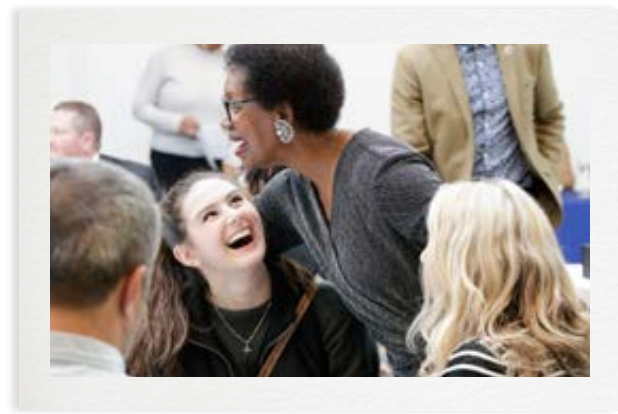
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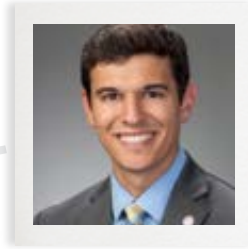
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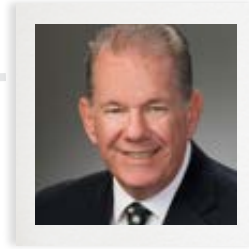
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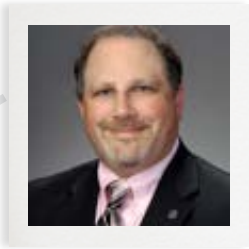
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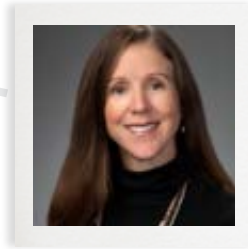
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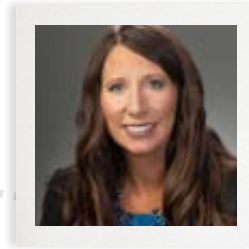
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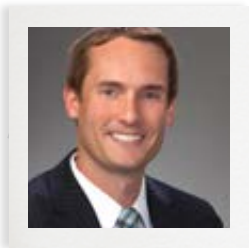
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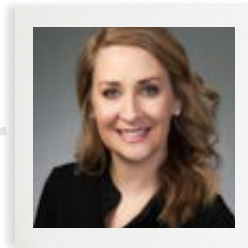
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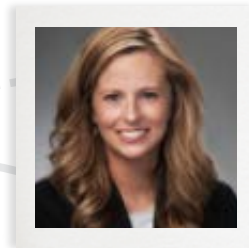
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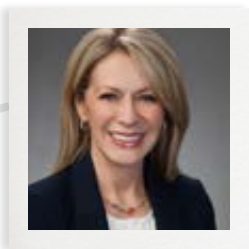
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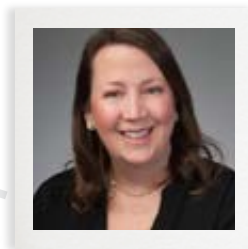
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GRANTS COORDINATOR
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**THE LONGEST JOURNEY
IN THE WORLD IS
FROM OUR HEART TO
OUR HEAD** — MOTHER TERESA

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**LIFE IS A JOURNEY.
WHEN WE STOP,
THINGS DON'T GO
RIGHT.** — POPE FRANCIS



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NEW FUNDS

The Catholic Foundation offers Catholics a way to leave a legacy uniquely aligned with our values and beliefs. The Foundation invests all funds in accordance with the USCCB guidelines for Catholic Socially Responsible Investments. We are honored to steward your gifts to the following new funds.

CHARITABLE GIFT ANNUITY

DALE LAHM GIFT ANNUITY (3)

JAMES J. THIMMES CHARITABLE GIFT ANNUITY

DONOR ADVISED FUND

THE BRUCE AND MARY ANN LUECKE DONOR ADVISED FUND
 THE FATHER ROGER PATRICK GORMAN DONOR ADVISED FUND
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 THE ST. VINCENT DE PAUL, POWELL, OHIO DONOR ADVISED FUND
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 THE ELIZABETH NEW LIFE FUND DONOR ADVISED FUND
 THE YOUNG CATHOLIC PROFESSIONALS (YCP) COLUMBUS DONOR ADVISED FUND
 ATHE BEECHER MARMION DONOR ADVISED FUND
 THE MOMMIES MATTER DONOR ADVISED FUND
 THE FITZPATRICK FAMILY DONOR ADVISED FUND
 THE PATRICK J. AND MARY ANNE D'ANDREA FAMILY DONOR ADVISED FUND
 THE SANCTOVAGUES VOCATIONS PROGRAM DONOR ADVISED FUND
 THE KING FAMILY DONOR ADVISED FUND
 THE SACRED HEART ENTHRONEMENT NETWORK DONOR ADVISED FUND
 THE HOOPINGARNER FAMILY DONOR ADVISED FUND
 THE CATHOLIC MEN'S MINISTRY DONOR ADVISED FUND
 THE KAUFMAN FAMILY DONOR ADVISED FUND
 THE KEN AND PENNY YUNKER DONOR ADVISED FUND
 THE SMELTZER FAMILY DONOR ADVISED FUND
 THE THOMAS AND CAROLINE KURTZ DONOR ADVISED FUND
 THE FELDMANN FAMILY DONOR ADVISED FUND
 THE THOMAS AND DEBORAH HARVEY DONOR ADVISED FUND
 THE JOEL AND SARAH CLARK DONOR ADVISED FUND
 THE INFANTE FAMILY DONOR ADVISED FUND
 THE KEVIN P. AND MARY C. MURPHY FAMILY DONOR ADVISED FUND
 THE ST. GABRIEL CATHOLIC RADIO NETWORK DONOR ADVISED FUND
 THE MICHAEL J. & KATHLEEN A. NEHF FAMILY DONOR ADVISED FUND
 THE LINC WORLDWIDE DONOR ADVISED FUND
 THE NEWARK CATHOLIC HIGH SCHOOL INSPIRE CAMPAIGN DONOR ADVISED FUND
 THE GREATER COLUMBUS RIGHT TO LIFE DONOR ADVISED FUND
 THE DOYLE FAMILY FUND

THE ST. GABRIEL RADIO, INC. DONOR ADVISED FUND

LINDY INFANTE FOUNDATION ATHLETIC SCHOLARSHIP DONOR ADVISED FUND

THE TEHAN-DUNN DONOR ADVISED FUND

THE KATHLEEN C. MCCLERNON MEMORIAL FUND

THE HOMEPOR DONOR ADVISED FUND

THE CLARK-MIXTACKI FAMILY DONOR ADVISED FUND

THE MERS FAMILY DONOR ADVISED FUND

THE KIRIAN FAMILY DONOR ADVISED FUND

THE MAGALSKI FAMILY FUND

ENDOWMENTS

THE BETTY J. MILLER ENDOWMENT FUND

This fund will provide support to St. Mary School, Marion, Ohio.

THE NINA SIERAKOWSKI MEMORIAL ENDOWMENT FUND FOR THE ST. ANDREW SCHOOL SCIENCE PROGRAM

This fund shall provide for purchase of scientific equipment for all the students at St. Andrew School that will be used to encourage and promote a greater understanding of science.

THE BISHOP WATTERSON HIGH SCHOOL DOMINICAN PROGRAM ENDOWMENT FUND

This fund shall provide for the needs of the Dominican Program at Bishop Watterson High School.

THE BISHOP WATTERSON HIGH SCHOOL TUITION EARNED FOR EXTRA EFFORT (TEFEE) ENDOWMENT FUND

The fund shall provide for tuition assistance to students at Bishop Watterson High School.

THE CHURCH OF THE HOLY TRINITY CEMETERIES ENDOWMENT FUND

This fund shall provide for the operating needs of the cemeteries which are maintained by the Church of the Holy Trinity, Zoar, Ohio.

OHIO DOMINICAN UNIVERSITY ENDOWMENT FUND

This fund shall provide for the general needs of Ohio Dominican University.

THE GORMAN FAMILY ENDOWMENT FUND FOR ST. THOMAS MORE NEWMAN CENTER

This fund provides for the general needs of the St. Thomas More Newman Center at The Ohio State University.

THE JOHN AND CHRISTINA LANDOLFI FAMILY ENDOWMENT FUND

This fund will provide for the greatest needs of Cristo Rey Columbus High School.

THE DIANA C. LAHM ENDOWMENT FUND

50% of the fund shall support the general needs of the MedVet Charitable Foundation and 50% shall support the Dale and Catherine Lahm Scholarship at the Holmes County Education Foundation.

THE CHURCH OF THE RESURRECTION NEW ALBANY CAPITAL INFRASTRUCTURE ENDOWMENT FUND

This fund will provide for the capital infrastructure needs of the Church of the Resurrection, New Albany, Ohio.

THE CHURCH OF THE RESURRECTION NEW ALBANY CATHOLIC EDUCATION STUDENT AID ENDOWMENT FUND

This fund will provide tuition assistance support to students who are active members of the Church of the Resurrection, New Albany, Ohio and attend primary or secondary Catholic schools within the Diocese of Columbus.

ST. AGATHA SCHOOL TUITION ASSISTANCE ENDOWMENT FUND

This fund shall provide tuition assistance support to students attending St. Agatha School.

ST. AGATHA PARISH CAPITAL ENDOWMENT FUND

This fund shall provide for the capital needs of St. Agatha Parish.

THE DAVID AND ROSE MARIE FARABAUGH ENDOWMENT FUND

This fund shall provide financial assistance to deserving students attending Our Lady of Perpetual Help School in Grove City, Ohio with priority given to a student with special or diverse educational needs.

CRAIG AND AUDREY STAMMEN MISSIONARY SUPPORT ENDOWMENT FUND

This fund shall provide financial support of missionaries serving Catholic Youth Summer Camp, Inc.

ST. FRANCIS DESALES HIGH SCHOOL BUILDING MAINTENANCE ENDOWMENT FUND

This fund shall provide for the building and facility maintenance and repair needs of St. Francis DeSales High School, Columbus, Ohio.

ST. FRANCIS DESALES HIGH SCHOOL TUITION ASSISTANCE ENDOWMENT FUND

This fund shall provide tuition assistance through the Merit Scholarship Program to students attending St. Francis DeSales High School, Columbus, Ohio.

THE HOMEPOR LEGACY ENDOWMENT FUND

This fund shall support the mission and financial sustainability of Homeport in perpetuity.

THE CLARK-MIXTACKI FAMILY ENDOWMENT FUND

This fund shall provide, in equal distributions, tuition assistance to families with demonstrated financial need at Cristo Rey Columbus High School in Columbus, OH, Holy Family Elementary School in Stow, OH, and Archbishop Hoban High School in Akron, OH.

THE ST. MICHAEL PRESCHOOL SCHOLARSHIP ENDOWMENT FUND

This fund shall provide tuition assistance for deserving students at St. Michael Preschool, Worthington, Ohio.

THE RIMELSPACH SEMINARIAN ASSISTANCE FUND

This fund shall assist only seminarians of the Diocese of Columbus with any special needs they may have, such as direct and personal expenses not related to tuition.

IMBER FAMILY ENDOWMENT FUND FOR ST. TIMOTHY SCHOOL, COLUMBUS, OHIO

This fund shall provide tuition assistance for students with financial need attending St. Timothy School, Columbus, Ohio or for the greatest needs of the school as determined from time to time by the Principal of St. Timothy.

MONSIGNOR ROMANO CIOTOLA MEMORIAL ENDOWMENT FUND

This fund shall support vocations to the priesthood and religious life in the missions through the Society of St. Peter the Apostle under the direction of the New York Archdiocese Mission Office, currently located at 1011 First Avenue, New York, NY 10022.

THE KATHRYN S. HIRSCH ENDOWMENT FUND

This fund shall support equally St. Mary Roman Catholic Church, Chillicothe, Ohio TIN #31-4414093; the Province of St. John the Baptist of the Order of Friars Minor, benefiting Friarworks, Cincinnati, Ohio TIN 31-6064103; Adena Health Foundation, Friends of Hospice Fund, Chillicothe, Ohio TIN 74-3008742; The Catholic Foundation, Bishop Flaget Elementary School Fund #320ACL, Columbus, Ohio TIN 31-1116640; and St. Margaret Cemetery, Chillicothe, Ohio TIN 31-4394166.

THE GORMAN FAMILY ENDOWMENT FUND FOR THE HAZELDEN BETTY FORD FOUNDATION

The fund provides for the general needs of the Hazelden Betty Ford Foundation.

THE LICKING COUNTY CATHOLIC SCHOOLS SPICE ENDOWMENT FUND

This fund shall support the SPICE program for students with special needs in Licking County, Ohio, Catholic schools, including for faith formation and regular education.

THE ROBERT L. AND MARIE M. DAWES CATHOLIC EDUCATION ENDOWMENT FUND

The purpose of this fund is to provide tuition assistance to registered parishioners of The Church of the Resurrection, New Albany, Ohio, for their primary and secondary education. Such parishioners shall be actively involved in the parish as determined by the Pastor or his designate.

SAINT STEPHEN THE MARTYR CATHOLIC CHURCH ENDOWMENT FUND

This fund shall provide for all of the general needs of Saint Stephen the Martyr Catholic Church.

THE JAMES R. HUNKLER ST. CHRISTOPHER PARISH ENDOWMENT FUND

The purpose of this fund is to provide for the general needs of St. Christopher Parish, Columbus, Ohio.

THE RACHELLE A. MARTIN ENDOWMENT FUND

This fund shall provide for the needs of St. Dominic Catholic Church, Mother Angeline McCrory Manor, the Dominican Sisters of Peace and the National Alliance on Mental Illness in Franklin County (NAMI).

THE DEBORAH A. COLEMAN ENDOWMENT FUND

This fund is for the following purpose: 50% for the general needs of St. Andrew Parish; 25% for the general needs of the St. Francis Evangelization Center; 25% for the general needs of St. Gabriel Radio Network.

THE ST. MARY PARISH SCHOOL ENDOWMENT FUND

The purpose of this fund is to provide for the general needs of St. Mary Parish School, Columbus, Ohio.

THE GINGER WEST ENDOWMENT FUND

The purpose of this fund is to benefit evenly the Brian Muha Run the Race Club, Columbus, Ohio, St. Gabriel Catholic Radio, Columbus, Ohio and Mary's Meals, Bloomfield, New Jersey.

**THE FACT THAT OUR
HEARTS YEARN FOR
SOMETHING EARTH
CAN'T SUPPLY IS PROOF
THAT HEAVEN MUST BE
OUR HOME.**

— C.S. LEWIS

TONTI FAMILY ENDOWMENT FOR HOLY FAMILY SOUP KITCHEN

This fund shall provide for the needs of the Holy Family Soup Kitchen, Columbus, Ohio.

TONTI FAMILY ENDOWMENT FOR ST. AGATHA'S ST. VINCENT DE PAUL SOCIETY

This fund shall provide for the needs of the St. Vincent de Paul Society based out of St. Agatha Church, Columbus, Ohio.

TONTI FAMILY ENDOWMENT FOR J.O.I.N.

This fund shall provide for the needs of the J.O.I.N. organization.

TONTI FAMILY ENDOWMENT FOR THE DIOCESE OF COLUMBUS

This fund shall provide for Social Service needs of organizations within the Diocese of Columbus.

THE CATHOLIC MEDICAL ASSOCIATION OF CENTRAL OHIO ENDOWMENT FUND

This fund is for the purposes that are approved by the Board of Catholic Medical Association of Central Ohio, and that are also consistent with its bylaws.

THE MARY A. KING FAMILY ENDOWMENT FUND

This fund shall provide for all of the general needs of Immaculate Conception Catholic Church located at 215 E. North Street, Kenton, Ohio 43326.

THE SAINT THOMAS AQUINAS CATHOLIC EDUCATION AND DEVELOPMENT ENDOWMENT FUND

The purpose of this fund is for the Catholic education and development needs of the Parish.

THE SAINT THOMAS AQUINAS PARISH ENDOWMENT FUND

The purpose of this fund is for the general needs of the Parish.

FATHER REIDY COUNCIL 1786 FOUNDERS FUND

The purpose of this fund shall provide for all the general needs of the Knights of Columbus Council 1786

THE FRANK AND FRAN FANTIN FAMILY TUITION ASSISTANCE ENDOWMENT FUND

This fund shall provide financial assistance to deserving students attending Tuscarawas Central Catholic High School.

THE FRANK J. AND MARY J. WESLEY MEMORIAL ENDOWMENT FUND

This fund shall provide tuition assistance for students with financial need at Blessed Sacrament School, Newark, OH.

THE PAUL AND PATRICIA SUVER ENDOWMENT FUND

This fund will provide for the general needs of St. Bernard Catholic Church, New Washington, Ohio.

SCHOLARSHIPS

THE CINDY, BEN, AND JIM SMITH "YOU CAN MAKE A DIFFERENCE" SCHOLARSHIP FUND

2nd Vote
 A Day Away Inc.
 Adore Ministries
 Adoremus
 Aid to the Church in Need
 All Saints Academy
 ALL Teddy Bear Fund Incorporated
 Alpha Sigma Nu
 American Battlefield Trust
 American Center for Law & Justice, District of Columbia, Inc.
 American Foundation for Suicide Prevention
 American Heart Association
 American Red Cross
 American Red Cross of Central Ohio
 Archbishop Alter High School
 Archbishop Alter High School Annual Fund
 Archbishop Moeller High School
 Archdiocese for the Military Services, USA
 Archdiocese of Cincinnati
 Archdiocese of Denver
 Archdiocese of Milwaukee
 Arthritis Foundation, Central Ohio Chapter
 Ascension Catholic Church, Kettering
 Ashland University
 Ave Maria Radio
 Back in His Arms Again
 Basilica of the National Shrine of the Immaculate Conception
 Bethesda Healing Ministry
 Big Brothers & Big Sisters Association of Greater Columbus
 Big Brothers/Big Sisters of Licking & Perry Counties
 Birthright of Columbus, Inc.
 Bishop Fenwick School
 Bishop Flaget School
 Bishop Griffin Resource Center
 Bishop Hartley High School
 Bishop Ready High School
 Bishop Watterson High School
 Bishops Annual Appeal
 Bishops' Golf Classic
 Bittersweet Farms
 Blessed Sacrament School, Newark
 Bottoms Up Diaper Drive
 Boxer Luv Rescue
 Boy Scouts of America
 BREAD
 Bucknell University
 Calvert Catholic Schools
 Camp O'Bannon of Licking County Inc.
 Cancer Support Community Central Ohio
 Capital Area Humane Society
 Capuchin Province of Mid-America
 Cardinal Kung Foundation
 Cardinal Newman Society
 Cardinal Stritch Catholic High School
 Care Net Family Resource Center
 Care Net Pregnancy Services of Northern Kentucky
 Carmelite Sisters of the Divine Heart of Jesus
 Carroll High School
 CASA of Franklin County
 Cathedral of the Assumption, Louisville
 Catholic Answers, Inc.
 Catholic Central High School
 Catholic Charismatic Renewal, Inc.
 Catholic Charities of the Archdiocese of Milwaukee, Inc.
 Catholic Charities Samaritan House
 Catholic Church Extension Society
 Catholic Community Foundation
 Catholic Inner-City Schools Education Fund (CISE)
 Catholic League
 Catholic Medical Association of Central Ohio
 Catholic Men's Ministry
 Catholic Near East Welfare Association
 Catholic Relief Services
 Catholic Social Services
 Catholic Youth Summer Camp, Inc.
 Center for Performing Arts at Ohio Northern University
 Center of Care Donor Advised Fund Interfund Grant
 Central American Medical Outreach
 Central Asia Institute
 Central Ohio Lions Eye Bank
 Central Ohio Youth for Christ
 Chamnade High School
 Children of Mary
 Children's Home of Northern Kentucky
 Christ Child Society of Columbus
 Christ the King Parish, Columbus
 Christina Ann Allwein Donor Advised Fund
 Christ's Table
 Church of St. Edward the Confessor, Granville
 Church of the Ascension, Johnstown
 Church of the Blessed Sacrament, Newark
 Church of the Resurrection, New Albany
 Civil Vision International
 Clintonville-Beechwood Community Resources Center
 College of Mount Saint Vincent
 Columbus and Franklin County Metro Parks
 Columbus Catholic Men's Ministry
 Columbus Catholic Women's Conference
 Columbus Landmarks
 Columbus Metropolitan Library Foundation

Columbus Right to Life Educational Foundation
 Comboni Missionaries
 Community Kitchen, Inc.
 Community of Franciscan Sisters of the Renewal
 Community of Holy Rosary & St John the Evangelist
 Community Shelter Board
 Compassion International
 Congregation of 3rd Order of St. Francis of Mary Immaculate
 Congregation of the Oratory
 Cornerstone of Hope
 Corpus Christi Parish, Columbus
 Corryville Catholic Elementary School
 Counry Club at Muirfield Village Foundation
 Couple to Couple League International Inc.
 Covenant House
 Created Equal
 Creighton University
 Cristo Rey Columbus High School
 Cross Catholic Outreach
 Cum Christo
 Damascus Catholic Mission Campus
 Dancers' Group
 Dare to Care Food Bank
 Days for Girls
 Denison University
 Detroit Public Television
 Diocese of Columbus
 Diocese of Columbus - Care for Aged Priests
 Diocese of Columbus - Catholic Ethnic Ministries
 Diocese of Columbus - Chancery Office
 Diocese of Columbus - Education for Seminarians
 Diocese of Columbus - Finance Office
 Diocese of Columbus - Office for Social Concerns
 Diocese of Columbus - Office of Catholic Schools
 Diocese of Columbus - Office of Communications
 Diocese of Columbus - Office of Marriage and Family Life
 Diocese of Columbus - Office of the Chancery
 Diocese of Columbus - Office of Vocations
 Diocese of Columbus - Tribunal Office
 Diocese of Columbus Parish Aid Fund
 Diocese of Covington Stewardship
 Diocese of Joliet
 Diocese of Steubenville
 Disabled American Veterans
 Discalced Carmelite Friars
 Disciples of the Lord Jesus Christ
 Divine Mercy Church
 Divine Word Missionaries
 Dominican Friars of the Province
 Dominican Learning Center
 Dominican Sisters Immaculate Conception Province
 Dominican Sisters of Hawthorne
 Dominican Sisters of Mary, Mother of the Eucharist
 Dominican Sisters of Peace
 Dominican Sisters of Saint Cecilia
 Dover Public Library
 Dublin Dance Foundation
 EAA Experimental Aircraft Association
 Easter Seals of Central and South
 Eastside Community Ministries
 Elder High School
 Elefence International
 Equestrian Order of the Holy Sepulchre of Jerusalem
 ETC Theatre Company Inc.
 Eternal Word Television Network
 Fairhope Hospice and Palliative Care, Incorporated
 Faith Mission
 Family Honor, Inc.
 Family Honor-Pio Project, Columbus
 Family Research Council
 Fassbender Endowment Fund
 Father Andrew White, S.J. School
 Fellowship of Catholic University Students
 Fisher House
 Flying Horse Farms
 Focus on the Family
 Food for the Poor
 Forever Dads
 Forgotten 4-Paws
 Foundation For Appalachian Ohio
 Franciscan Daughters of Mary
 Franciscan Foundation for the Holy Land
 Franciscan Friars of the Holy Spirit
 Franciscan Friars of the Renewal
 Fraternal Inc.
 Friends of Notre-Dame de Paris, Inc.
 Georgetown University
 GiGi's Playhouse
 Ginger West Donor Advised Fund
 Glenmary Home Missioners
 Grand Rapids Ballet
 Greater Columbus Right to Life
 Habitat for Humanity International
 Hands Together, Inc.
 Hardin County SOUP
 Harrison County Catholic School System
 Heart to Heart Inc. A Catholic Media Ministry
 Heartbeat International
 Heartbeats of Licking County
 Help In Healing Home

Hillsdale College
 Holy Cross Parish, Columbus
 Holy Family Catholic Church, Port St. Lucie
 Holy Family Hospital of Bethlehem
 Holy Family Parish, Columbus
 Holy Family Soup Kitchen & Pantry
 Holy Name Catholic Parish, Sheridan
 Holy Name Parish, Columbus
 Holy Redeemer Parish, Portsmouth
 Holy Spirit Parish, Columbus
 Holy Spirit School
 Holy Trinity Parish, Bolivar
 Holy Trinity Parish, Pond Creek
 Holy Trinity Parish, Wellston
 Homeport Ohio
 Honorable Order of Kentucky Colonels
 Hope Hollow
 IBC Network Foundation
 Immaculate Conception Parish, Columbus
 Immaculate Conception Parish, Dennison
 Immaculate Conception Parish, Kenton
 Immaculate Conception School, Columbus
 Immaculate Conception School, Dennison
 Immaculate Conception School, Kenton
 Immaculate Heart of Mary Parish, Cuyahoga Falls
 Institute for Justice
 International Theological Institute for Studies on Marriage
 and the Family, USA
 Into The Field
 J.O.I.N.
 Jesuit Spiritual Center at Milford
 Jesuit Volunteer Corps
 John Carroll University
 John F. Kennedy Catholic High School
 Jubilee Museum
 Kof C Christian Refugee Relief, Knights of Columbus Charities
 Kairos Prison Ministry of Ohio
 Kairos Prison Ministry of Southwest Ohio
 Kenosha Christmas Charities
 Kentucky Wesleyan College
 Knights of Columbus #4603
 Knights of Columbus Charities USA
 Knights of Columbus Council #1428
 Knights of Columbus Council #4471
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 La Salle High School
 League of Saint Anthony
 Lenity Project
 Lial Catholic School
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Mr. and Ms. Kenneth F. Scheve Jr.
Mr. and Mrs. Kurt J. Schilder

Mr. and Mrs. John C. Schimmel
Mr. Adham C. Sching
Mr. and Mrs. Robert J. Schmidt Jr.
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Ms. Elizabeth A. Schnitzler
Ms. Anita M. Schroeder
Mrs. Mary Margaret Schultheis
Mr. Gabe Sciarretti
Mr. and Mrs. Thomas E. Scono
Ms. Carol Scott
Mr. and Mrs. Richard Scurti
Mr. and Mrs. Ralph Searles
Mr. and Mrs. Thomas Seeley
Mr. and Mrs. Thomas L. Septer
Mr. Carl F. Serra
Ms. Karen Sessis
Mr. and Mrs. John G. Shaver
Mr. Gregory Sheumaker and Mrs. Beth Sheumaker
Mr. Robert® Mrs. Donna Shipka
Mr. and Mrs. William F. Shonebarger
Mr. Luis A. Siles
Mr. Fabio Silva
Mr. and Mrs. John Smith
Mrs. Judith D. Smith
Mr. and Mrs. Rod Smith
Ms. Cathy Snyder
Mr. Jeff Soiu and Linda M. Pod
Ms. Sandra Spangler
Mr. and Mrs. Lindo Spinosi
Ms. Marsha A. Spires
Mr. and Mrs. David Spurgeon
St. Cecilia Parish
Mr. Charles D. Stacy
Ms. Judith A. Stapelton
Mr. and Mrs. Richard R. Stedman
Mr. and Mrs. Paul R. Stein
Stitching Spectrum
Mr. and Mrs. David E. Stolarski
Mrs. Catherine Strickland
Mr. and Mrs. Steven J. Strobel
Mr. and Mrs. Bruce Stydnicki
Mr. and Mrs. Peter Sullivan
Mr. and Mrs. Gregory T. Sulzer
Mr. and Mrs. Vincent Susi
Mr. and Mrs. Brian Swigert
Mr. John R. Swisher
Mr. and Mrs. Michael R. Szolosi Jr.
Mr. and Mrs. William Tanner
Mr. Frederick W. Taylor and Ms. Marie Sweeney
Ms. Ladi Tchabounono
Mrs. Mary Ann Thimmes
Mr. and Mrs. John S. Thomas
Mr. Eric Thompson
Mr. and Mrs. Kerry R. Thompson
Thomson-MacConnell Cadillac
Mr. Mickie K. Timmons
Mr. and Ms. Robert J. Todd
Mr. and Mrs. Rod D. Trainer
Ms. Marilyn W. Trapp
Mrs. Doris Trzcinski
Mr. and Mrs. Jerry Turner
Mr. and Mrs. Nathan Tuttle
Ms. Donna M. Underwood
Ms. Beth Vanderkooi
Mr. Denis Veneziano
Mr. Michael Verne
Villas of Gahanna Condominium Association

Mr. and Mrs. Christopher O. Vincent
Mr. and Mrs. Larry W. Vitatoe
Mr. and Mrs. Charles R. Wallace III
Mr. Todd Walter
Mrs. Anna Marie Ward
Mr. Tom Weikart
Mr. and Mrs. Brian Weis
Mr. Jeffrey M. Weiss and Mrs. Nancy Lerner-Weiss
Mr. Michael A. Weiss
Mr. and Mrs. Terrence Welsh
Mr. and Mrs. Thomas Wester and Ms. Vicki Buswell
Mr. and Mrs. Michael Whaley
Mr. and Mrs. James P. White
Mrs. Marilyn White
Mr. Ivan Whiting
Mr. and Mrs. Brian S. Wilcox
Mr. and Mrs. Martin J. Williamson
Mr. and Mrs. Jesse B. Wilson Jr.
Mr. & Mrs. and Mrs. Mitch Wilson
Mrs. Diana Marie Winkler
Mr. Hugo G. Wittman and Ms. Patricia A. Wittmann
Mr. and Mrs. Arthur F. Wohlfrom Jr.
Ms. Carey Wrigley
Mr. and Mrs. Peter B. Yeldell
Ms. Kelsey Yoelzadeh
Ms. Kathleen E. Zelnik
Ms. Kristi A. Ziegler
Mr. and Mrs. Joseph T. Zupi

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 Mr. Colin E. Bayliss
 Mr. and Mrs. Joseph M. Berwanger
 Mr. and Mrs. Michael Bugosh
 Mr. and Mrs. Edward Burke Carey
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 Mr. Joseph Concheck
 Ms. Edna Crawford*
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 Dr. Francis* and Mrs. Marilyn P. Dono
 Mr. and Mrs. Ronald Fay*
 Mr. and Mrs. Patrick Fehring, Jr.
 Reverend Monsignor James A. Geiger*
 Mr. Jack* and Mrs. Kathleen Gibbons
 Most Reverend James A. Griffin JD, JCL
 Mr. and Mrs. Richard L. Gummer
 Mr. and Mrs. John M. Haemmerle
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 Mr. Arthur and Mrs. Lucy* Herrmann
 Mrs. Rebecca Morosky Hoffman
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 Mr. and Mrs. James D. McGill
 Mr. Thomas Patrick* Mrs. Mary M. McGuire
 Mr. and Mrs. Lawrence McLernon
 Dr. and Mrs. Patrick Moore
 Mr. and Mrs. Robert H. Morosky
 Mr. and Mrs. Michael R. Morosky
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 Mr. F.W.* and Mrs. Kathleen Power Sullivan
 Mr. and Mrs. Ronald A. Thomas, Sr.
 Mr. and Mrs. James J. Tornes
 Mr. Cornelius J. Tracy*
 Mr. and Mrs. Lou Welker*
 Mr. and Mrs. R. Patrick West*

* Deceased

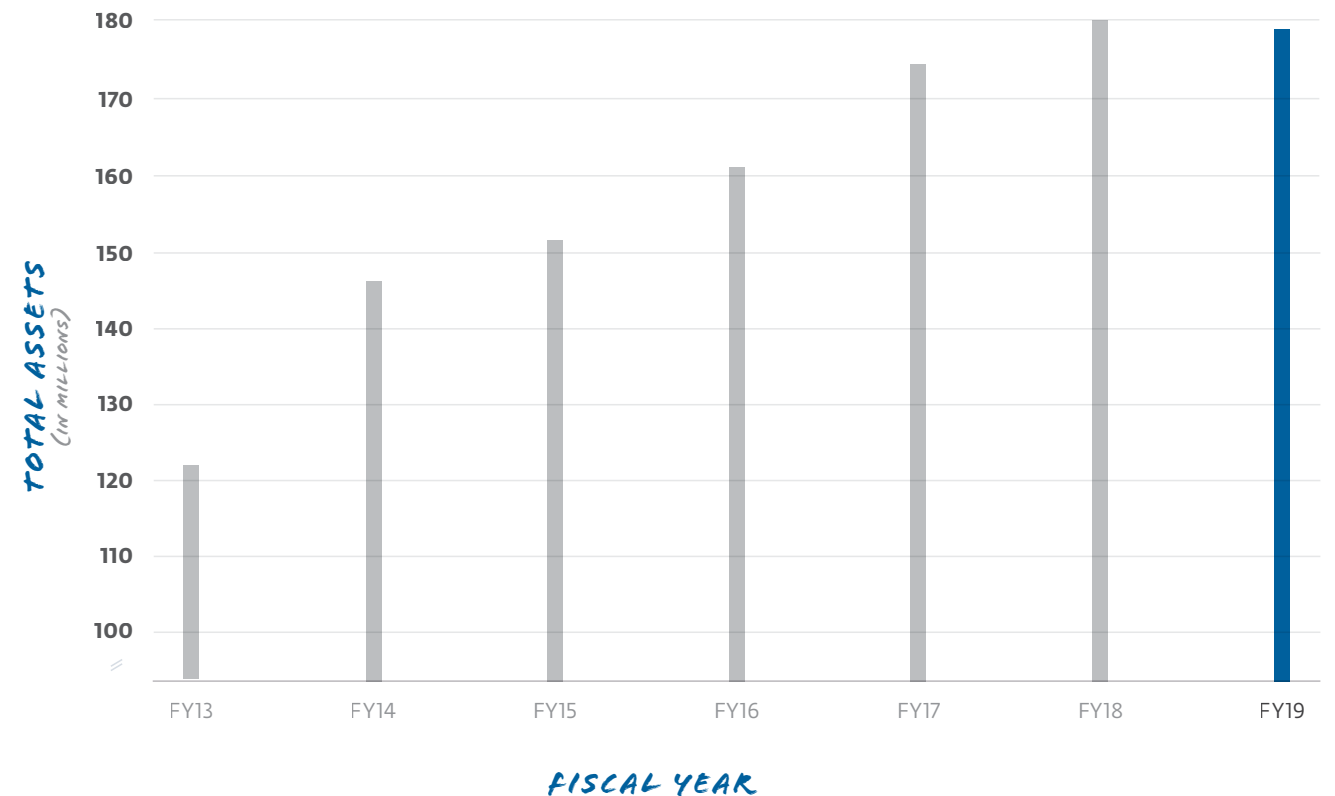
THE FOUNDATION PRAYER

Heavenly Father, giver of all good things, we praise and we thank you for your many gifts to us, especially the gift of new life that we have through your Son, Jesus Christ. We ask you, through the power of the Holy Spirit, to continue to stir up in us lively sentiments of gratitude, and enlighten our hearts and minds that we may share your many benefits to us with all those in any need. We pray this through the same Christ, our Lord. Amen.

- BISHOP FREDERICK F. CAMPBELL, D.D., PH.D.

2019 FINANCIAL STATEMENT

	2018	2019
Cash and Cash Equivalents	\$ 8,580,298	\$ 7,937,229
AR and Investment Income Receivable	609,626	769,721
Marketable Securities and Property	167,517,396	166,325,128
Land, Property and Equip Net	4,200,334	4,200,121
TOTAL ASSETS	\$180,907,654	\$179,232,199
Accounts and Grants Payable	\$ 639,680	\$ 470,838
Charitable Annuities and Trusts Payable	3,567,382	4,278,167
Long Term Debt	5,854,844	5,285,679
Agency Funds	117,117,034	117,598,693
TOTAL LIABILITIES	\$127,178,940	\$127,633,377
TOTAL NET ASSETS	\$ 53,728,714	\$ 51,598,822
TOTAL LIABILITIES AND NET ASSETS	\$180,907,654	\$179,232,199



FINANCIAL DISCLOSURES

The Foundation of the Catholic Diocese of Columbus (the Foundation) was incorporated in 1984 and organized as an Ohio non-profit corporation. The Foundation's purpose is to receive gifts and bequests and to dedicate their use primarily for religious, educational and charitable activities in connection with and for the benefit of the Roman Catholic Diocese of Columbus. All authority of the Foundation is vested in and exercised by its Board of Trustees.

ACCOUNTING POLICIES

The financial statements of the Foundation are prepared on the accrual basis of accounting and, accordingly, reflect all significant revenues, expenses, assets, liabilities and net assets of the Foundation. The Foundation is required to report information regarding its financial position and activities according to three classes of net assets: unrestricted net assets, temporarily restricted net assets, and permanently restricted net assets. Temporarily restricted net assets consist of funds restricted by time or purpose by the donors to support program activities. Permanently restricted net assets consist of restricted funds that are to be held in perpetuity with income available to support donor advised and general operating purposes.

AGENCY FUNDS

The Foundation is required to record contributions from donors for the benefit of a specified beneficiary as agency funds. The Foundation is the recipient organization that acts as an agent for a beneficiary if it agrees to solicit assets from potential donors specifically for the beneficiary's use and to distribute those assets or the return from investing those assets to the beneficiary

INVESTMENT POOLS

The Foundation utilizes common investment pools to manage most of its investments. The earnings from investments (interest and dividends) as well as investment gains and losses of the pools are allocated to the individual fund according to its percentage of ownership of the investment pool.

DISTRIBUTION POLICY

The Foundation's distribution policy is to distribute an amount up to 5% of the average market value over 12 rolling quarters.

ANNUITIES AND CHARITABLE REMAINDER TRUSTS

The Foundation administers various charitable annuity and remainder trust agreements with donors. The arrangements provide for agreed upon distributions over a designated period of time (usually the designated beneficiary's lifetime or a term of years). A liability has been recorded equal to the present value of the estimated future obligation. This obligation amount includes the present value of all anticipated payments to the donors based on their life expectancy or a term of years. The Foundation revalues this liability annually.

TAX STATUS

The Foundation is a publicly supported charitable organization that is exempt from federal and state taxes under section 501(c)(3) of the Internal Revenue Code.

AUDITED FINANCIAL STATEMENTS

Audited financial statements are available upon request.

