



Catholic Foundation
 DIOCESE OF ST. AUGUSTINE 

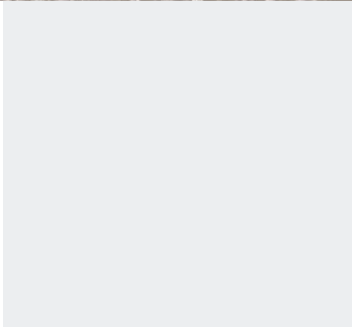
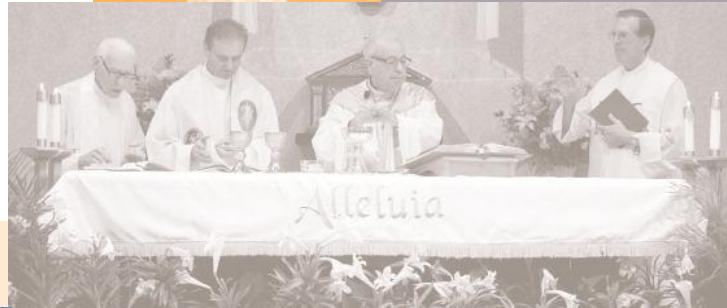
MEANINGFUL

IMPACT

THROUGH
 INSPIRED
 GIVING



ANNUAL
 REPORT
 2018-2019



CONNECTING CATHOLICS

TABLE OF CONTENTS



OVERVIEW

Welcome From Bishop Estévez	Page 2
Mission & Vision Statements	Page 3
Letter From Board Chair & Executive Director	Page 4

FINANCIALS

Financial Activity	Page 5 & 6
Catholic Responsible Investing	Page 6

ENDOWMENT

Endowment Fund Accounts	Page 7
Inspired To Give, Leaving a Lasting Impact	Page 8
Distributions & Grants	Page 9
Grant Recipient – St. Cecilia Music Ministry	Page 10

ORDER OF AUGUSTIN VEROT	Page 11 & 12
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ABOUT THE FOUNDATION

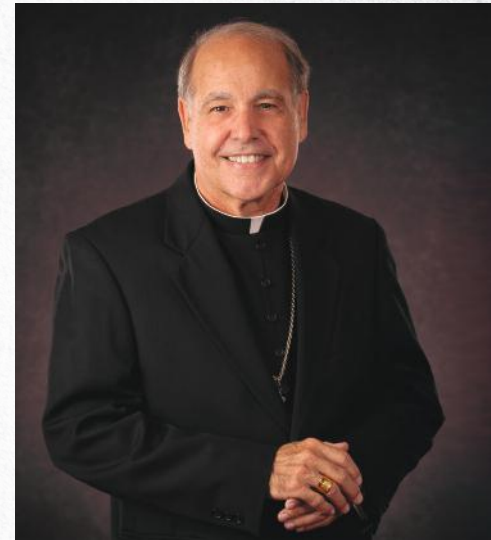
Values Statement	Page 13
Foundation Leadership & Staff	Page 14

WELCOME FROM BISHOP ESTÉVEZ



Dear Brothers and Sisters in Christ,

I am pleased to share with you the 2018-2019 Annual Report of the Catholic Foundation, Diocese of St. Augustine. Since its inception in 1987, the Foundation has continued to connect Catholics in a meaningful and lasting way with parishes, schools, and ministries throughout the 17 counties that form our diocese in North Florida. In fact, since disbursements began in 2002, almost \$11.2 million has been distributed through income earned from these investments!



I am so very grateful for the leadership of our Foundation Board of Directors, who commit so much of their time in service to our Church and community. I am particularly grateful to Father Michael Houle, who has served this year as Interim Executive Director. His careful direction has served as a sound foundation for the work of our new Executive Director, Patricia DiSandro.

I also thank the donors who have responded most generously to the blessings of our Lord. Your gifts strengthen the mission of our Church and make an eternal difference in the lives of so many. Your generous response to our call to be stewards of His many blessings is an investment into the future of our faith family.

May Christ be with you as you continue to build communion within the Church and out into the world for generations to come. I am,

Sincerely yours,

A handwritten signature in blue ink that reads "F. J. Estévez".

Most Rev. Felipe J. Estévez, S.T.D.
Bishop of St. Augustine

MISSION & VISION

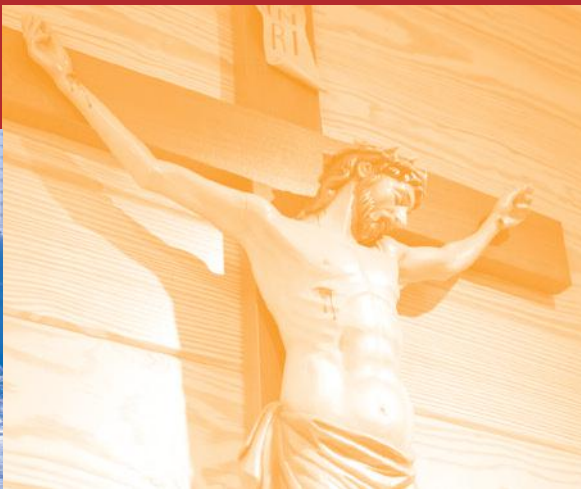


The Mission

The Catholic Foundation builds a Christ-centered future for the good works of the Church in North Florida through inspired charitable giving.

The Vision

The vision of the Catholic Foundation is a Church generously endowed to fully support the development and charity of our faith community.



LETTER FROM BOARD CHAIR & EXECUTIVE DIRECTOR



Dear Friends,

The 2018-2019 fiscal year found the Catholic Foundation continuing to reach more and more of the faithful, sharing our mission to serve as a trusted partner to our entire faith community. We live our Catholic faith through our enduring relationships and careful management of resources.

Our foundation has grown to include endowment accounts for more than 130 parishes, schools, and ministries in our diocese. This endowment has increased more than \$36 million and represents thousands of individual stories – stories of people throughout our diocese who are passionate about their faith and who want to make a meaningful and lasting difference in the work of the Church.

As you will see throughout this report, we made great strides in accomplishing the Foundation’s mission last year. We cannot stop and rest on these successes. If the Foundation is to fulfill its vision, then we need your help, your support, and your inspiration. YOU are why we are here and together we can insure the future of our Church and its important ministry.

Gratefully yours,



John J. McLaughlin
Board Chair



Patricia K. DiSandro
Executive Director



HIGHLIGHTS 2018-2019

- \$2,121,056 net increase in total assets
- \$1,464,481 distributed to account holders throughout the diocese
- \$111,200 in grants awarded to diocesan entities for 26 projects
- 182 individual gift plan consultations
- 5 new endowment accounts
- 10 estate planning presentations with Catholic Foundation partners
- 17 new Order of Augustin Verot faith legacy gift registrations
- 5 new board members

STATEMENT OF ACTIVITIES AND CHANGES IN NET ASSETS | AS OF JUNE 30, 2019

REVENUE, GAINS AND OTHER SUPPORT

Contributions	\$377,979
Investment income	\$1,381,886
Market gains (unrealized)	\$2,153,473
Other revenue	\$234,873
Total revenue, gains and other support	\$4,148,211

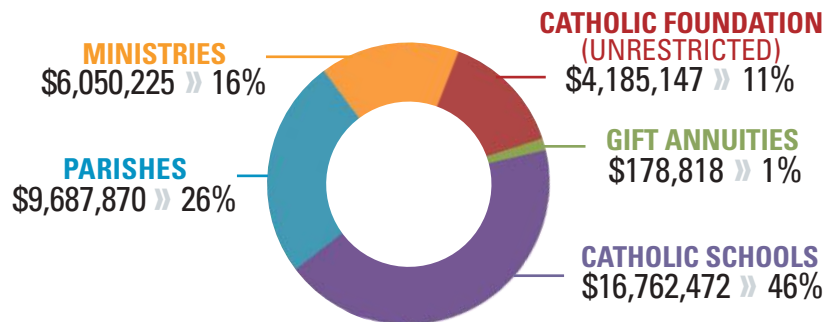
EXPENSES

Grants and account disbursements	\$1,464,481
Annuitant payments	\$102,254
Operating expenses	\$460,420
Total disbursements and expenses	\$2,027,155
Changes in net assets	\$2,121,056

NET ASSETS

Beginning of year	\$34,743,476
End of year	\$36,864,532

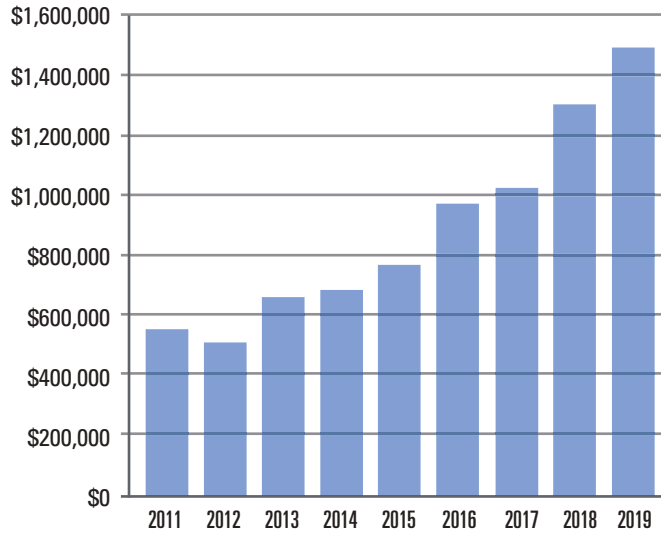
DONOR ASSET
ALLOCATIONS
AS OF
JUNE 30, 2019



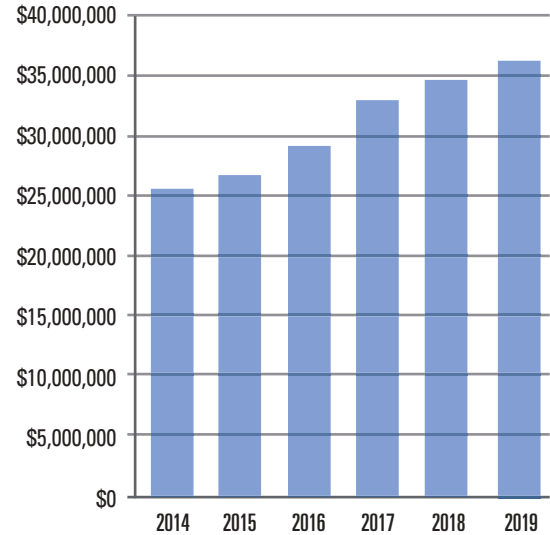
CATHOLIC FOUNDATION

For a copy of the independent auditor's report for the Catholic Foundation's fiscal year ending June 30, 2019 please write to:
 Diocese of St. Augustine | Attn: Fiscal Office | 11625 Old St. Augustine Road | Jacksonville, FL 32258
 904-262-3200 | www.dosaf1.com/catholic-foundation/ | IRS Form 990 is available at www.guidestar.org.

ENDOWMENT FUND DISTRIBUTIONS



NET ASSET GROWTH



“Besides physical improvements, the funds from our endowment account have helped us with the spiritual mission of St. Paul’s. We are so blessed and grateful for all the support our endowment has afforded us for the last several years.”



All of these enhancements have been possible because of our parishioners who have generously committed their blessings to invest in their beloved St. Paul’s.”

Fr. George Vaniyapurackal | Pastor
St. Paul Catholic Church,
Jacksonville

CATHOLIC RESPONSIBLE INVESTING

The Catholic Foundation partners with Christian Brothers Investment Services, Inc. (CBIS) and Wells Fargo to align our investments with our mission – not only to produce returns to fund the good works of the Church in North Florida, but to reflect in the investments themselves the ethical and social beliefs of our Catholic faith.

Christian Brothers and Wells Fargo employ socially responsible investing, an investment strategy designed specifically to allow our mission to work in harmony with the management of our investment portfolios. This strategy includes:

- Catholic Investment Screening
- Active Ownership
- Diversified Asset Management

The Catholic Foundation adheres to the investment guidelines of the United States Conference of Catholic Bishops and screens out companies that disregard Church teachings. As an investment strategy, this method seeks to actively improve companies by encouraging worker, environmental, and social reforms.

To find out more about our partnership with CBIS and Wells Fargo or to learn more about Catholic Responsible Investing go to <https://www.dosafi.com/catholic-foundation/>.

ENDOWMENT FUND ACCOUNTS

PARISHES

Assumption Catholic Church
Basilica of the Immaculate Conception
Blessed Trinity Catholic Church
 Blessed Trinity - General
 Blessed Trinity - Joyce A. Aycocke
Cathedral Basilica of St. Augustine
 Cathedral Basilica - General
 Cathedral Basilica Liturgical
Christ the King Catholic Church
 Christ the King - General
 Christ the King - Joyce A. Aycocke
 Christ the King SVDP
 Christ the King Youth
Corpus Christi Catholic Church
Crucifixion Catholic Church
Epiphany Catholic Church
Holy Cross Mission
Holy Faith Catholic Church
Holy Family Catholic Church - Jacksonville
 Holy Family - General
 Holy Family - Joyce A. Aycocke
Holy Family Catholic Church - Williston
Holy Rosary Catholic Church
Holy Spirit Catholic Church
Mary, Queen of Heaven Catholic Church
Most Holy Redeemer Catholic Church
Our Lady of Consolation Catholic Church
Our Lady of Good Counsel Mission

Our Lady Star of the Sea Catholic Church
Prince of Peace Catholic Church
Queen of Peace Catholic Church
Resurrection Catholic Church
Sacred Heart Catholic Church -
 Flemming Island
Sacred Heart Catholic Church - Jacksonville
San Jose Catholic Church
 San Jose - General
 San Jose - Joyce A. Aycocke
San Juan del Rio Catholic Church
 San Juan del Rio Bell Tower
 San Juan del Rio - General
 San Juan del Rio Perpetual Care
San Juan Mission
San Sebastian Catholic Church
Santa Maria del Mar Catholic Church
St. Ambrose Catholic Church
 St. Ambrose Cemetery
 St. Ambrose - General
St. Anastasia Catholic Church
St. Anthony the Abbot Mission
St. Augustine Catholic Church & Student
 Center - Gainesville
St. Catherine of Siena Catholic Church
St. Edward Catholic Church
St. Elizabeth Ann Seton Catholic Church
St. Francis of Assisi Mission, Yulee

St. Francis Xavier Catholic Church
St. John the Evangelist Catholic Church -
 Chiefland
St. John the Evangelist Catholic Church -
 Interlachen
St. Joseph Catholic Church
St. Luke Catholic Church
St. Madeleine Sophie Catholic Church
 St. Madeleine - General
 St. Madeleine Memorial Gardens
 Perpetual Care
St. Mary, Mother of God Catholic Church -
 Bunnell
St. Mary, Mother of Mercy Catholic
 Church - Macclenny
St. Matthew Catholic Church
St. Michael Catholic Church
 St. Michael - General
 St. Michael Cemetery
St. Monica Catholic Church
St. Patrick Catholic Church - Gainesville
St. Patrick Catholic Church - Jacksonville
St. Paul Catholic Church - Jacksonville
St. Paul Catholic Church - Jacksonville Beach
St. Peter Mission
St. Philip Neri Mission
St. Pius V Catholic Church
St. William Catholic Church

CATHOLIC SCHOOLS

All-Schools Scholarship
Annunciation Interparish School
Assumption Catholic School
Bishop John J. Snyder High School
 Bishop John J. Snyder High School - General
 BJSN Nu-Trend Scholarship
 BJSN Vallencourt Scholarship
 Louis E. & Genevieve C. Joos Trust -
 Bishop John J. Snyder High School
Bishop Kenny High School
 Bishop Kenny High School - General
 Louis E. & Genevieve C. Joos Trust -
 Bishop Kenny High School
Blessed Trinity Catholic School

Cathedral Parish School
Christ the King Catholic School
Diocesan Education
Epiphany Catholic School
Guardian Catholic School
Holy Family Catholic School
Holy Spirit Catholic School
James & Elizabeth Mullen Nassau County
 Catholic Education
Morning Star Catholic School
Palmer Catholic Academy
Queen of Peace Catholic Academy
Resurrection Catholic School
Sacred Heart Catholic School

San Jose Catholic School
St. Elizabeth Ann Seton Catholic School
St. Francis Catholic Academy
St. Joseph Academy - St. Augustine
St. Joseph Catholic School - Jacksonville
St. Matthew Catholic School
St. Michael Academy
 St. Michael Academy - General
 St. Michael Academy Don Fuller Scholarship
St. Patrick Catholic School - Jacksonville
St. Patrick Interparish School - Gainesville
St. Paul Catholic School - Jacksonville
 St. Paul - General
 Brizard Scholarship
St. Paul Catholic School - Jacksonville Beach

MINISTRIES

Camp St. John Chapel
Campus Ministry
 Caroline Sandow Alpha Retreat Scholarship
 St. Augustine Catholic Church -
 University of Florida *
 Steven O'Connell Catholic Gators Scholarship
Catholic Charities
 Bishop John J. Snyder Catholic Charities
 Camp I Am Special Maintenance
 Catholic Charities - General
 Catholic Charities Bureau, Gainesville
 Catholic Charities Jacksonville Regional Office
 Catholic Charities Lake City Regional Office
 Catholic Charities St. Augustine Branch

Disabilities Ministry
Edward I. Devlin Orphan Care & Adoption
Family Housing Management Co., Inc. *
Diocesan Christian Formation Ministry
 Christian Formation Ministry
 Women's Formation Scholarship
DSA Fund - Stewardship
Family Life Office
Office of Human Resources
Office of Youth & Young Adult Ministries*
Respect Life
San Lorenzo Cemetery
 San Lorenzo - Rosa McNally
 San Lorenzo Cemetery - General

National Shrine of Our Lady of La Leche
St. Vincent de Paul Society
 St. Augustine Diocesan Council,
 Society of St. Vincent de Paul, Inc
 St. Vincent de Paul Society, Inc.
Vocations
 Vocations - General
 Louis E. & Genevieve C. Joos Trust - Vocations
 Office For Education of Seminarians
 Pacita Tubianoza, MD & Amado
 Tubianoza Vocations*
 Priests' Long Term Care
 Sisters' Retirement
 Social Justice Education For Priests*

*New endowment funds which were created during the 2018-2019 fiscal year

INSPIRED TO GIVE, LEAVING A LASTING IMPACT

Pam and George Dewey care deeply about our Church in North Florida. Active parishioners in the Diocese of St. Augustine, they have built relationships and formed lasting ties throughout our faith community by volunteering and donating to parishes and ministries over the years.

Contributed by: Lilla Ross

To ensure the future of their beloved Church, they have also recently become “investors” in the Diocese of St. Augustine. Their investment will provide valuable support for several vital programs when they are no longer able to do so in person. The plans that they have made today are the foundation for future support for the people and ministries that are closest to their hearts.



They are especially proud of their parish community and grateful for the opportunity to help create its permanent endowment account at the Catholic Foundation. St. John Paul II Mission, one of the newest Missions in the diocese, was founded in 2012 in the community of Nocatee in St. Johns County. It began as a mission of Our Lady Star of the Sea Parish in Ponte Vedra Beach with 136 families and quickly doubled in size. A parish center was built in 2015 on 35 acres of land donated to the diocese by the Davis family.

“We’ve started an endowment for our parish, St. John Paul II Mission. This enables us and others to contribute now to grow future funding. The parish can also invest in the fund, ensuring its future growth. We’ve also made a plan to contribute to the endowment account for the Office of Human Life and Dignity. The actual money is coming from our IRA (individual retirement account).”

There are many ways to contribute to an endowment fund, either during life or through your estate plan, after you’re deceased.

The Deweys were updating their wills, making provisions for their two children and their favorite charities, when Pam read about a couple who had used their IRA to make a contribution to the Catholic Foundation as part of their estate planning.

“If someone with a Traditional IRA turned 70½ by the end of 2019, you are required to start making withdrawals,” George said. “For people who haven’t hit 70 ½ by the end of 2019, recent new legislation signed into law pushes out the RMD start date for most situations until age 72.” Income from an IRA can be taxable, but part or all of the income can be transferred as a qualified charitable distribution (QCD). By giving to the Foundation, the proceeds are not taxable,” he shared.***

If George sounds like he knows what he’s talking about, he does. He was an attorney in the estate and gift tax division for the Internal Revenue Service. Pam worked there also, in IT (Information Technology). They are both now retired. “I was reviewing wills and trusts and more aware of these issues than many folks,” George said.

“It’s such a young parish,” Pam said. “We were surprised by how many parishes and ministries have foundation accounts. It’s a long list, and it’s growing. And now, St. John Paul II does, too, and anyone can make contributions to it.”

The Deweys decided to contribute to the new endowment fund for their mission and the diocesan offices of Vocations and Human Life and Dignity as part of their estate plan. “We have so many seminarians, and this will help them as well as the future of our Church,” Pam said.

They also are contributing to the Office of Human Life and Dignity, where Pam is a longtime volunteer. She is the South Jacksonville Deanery Respect Life Chair, serving as an intermediary between parishes and the diocesan office. The diocese recently hosted the 2019 Florida Respect Life Conference at St. Anastasia Catholic Church in St. Augustine.

“One thing we like about utilizing the Foundation as a charitable partner is that we can choose what ministries and what percentages we give,” Pam said. “And – it’s very easily revised if needed in the future.”

George encourages people of any age to consider a gift to the Catholic Foundation. “Anyone making a gift — now or later — have several roads to take, but they should be aware of the tax law regarding gifts from IRAs,” George said. “It’s an investment in the diocese. This is a way of paying back.”

*** Due to frequent legal updates in this area, it is recommended you consult a tax professional or your financial advisor before making any charitable distribution. For further information, visit the Catholic Foundation webpage - <https://dosafll.giftplans.org/> “Ways to Give” regarding gifts from a retirement plan.

2018-2019 DISTRIBUTIONS AND GRANTS

The fiscal year 2018-2019 saw \$912,367 in distributions received by 56 of 128 eligible endowment accounts. These financial resources are the annual disbursement that account holders utilize to greatly increase the abilities of our parishes, schools, and ministries in achieving their missions.*

Total Distribution: \$1,464,481



Included in the total annual distributions of \$1,464,481, was \$111,200 in grants awarded to various Catholic entities in our diocese, who have submitted funding requests under Bishop Estévez's grant priorities of: Connectedness, Formation, or Outreach. These grants are made possible by formative contributions from the Diocese of St. Augustine, as well as generous individual donors who have given to the permanent unrestricted endowment account of the Catholic Foundation.

2019 FOUNDATION GRANT RECIPIENTS

Bishop John J. Snyder High School

Baker County Initiative (Outreach) - \$1,000

Catholic Charities

Camp I Am Special (Outreach) - \$5,000

Epiphany Catholic School

Rural Education Initiative (Formation) - \$6,500

Holy Rosary Catholic Church

Bathroom Renovation (Outreach) - \$8,000

Mary, Queen of Heaven Catholic Church

Learning Center (Formation) - \$5,000

Office of Christian Formation

Fanning the Flame (Formation) - \$3,000

Office of Human Life and Dignity

Florida Respect Life Conference (Outreach) - \$9,000

Office of Youth & Young Adult Ministries

Mpact Day of Service (Outreach) - \$1,000

Servant's Heart Camp (Outreach) - \$1,500

Urban Plunge (Outreach) - \$5,000

Sacred Heart Catholic School

Lives of Saints books (Formation) - \$1,000

San Juan Catholic Mission

Manitas de Jesus (Outreach) - \$3,000

Outreach to Rural Families (Outreach) - \$3,200

Sisters of St. Joseph

Revitalization & Expansion (Outreach) - \$3,500

St. Augustine Catholic Church

Parish Evangelization Team (Connectedness) - \$2,000

St. Francis Catholic Academy

Rural Education Initiative Technology Support (Formation) - \$5,500

St. Francis of Assisi Catholic Mission

Music Ministry (Formation) - \$3,000

St. Francis Xavier Catholic Church

Rural Parish Initiative (Formation) - \$6,500

St. John the Baptist Catholic Church

Religious Education (Formation) - \$5,000

St. John the Evangelist Catholic Church – Chiefland

St. Cecilia Music Ministry (Connectedness) - \$6,000

St. Mary, Mother of God Catholic Church

Youth Faith Formation (Formation) - \$1,000

St. Monica Catholic Church

Riding on Angels Wings (Formation) - \$6,500

St. Patrick Catholic Church – Jacksonville

Fidelis (Formation) - \$3,000

St. Patrick Catholic Church – Gainesville

Growth on Faith Family (Connectedness) - \$2,000

St. Patrick Interparish School

Transportation Program (Formation) - \$10,000

Young Catholic Professionals

Witness for Christ (Outreach) - \$5,000

*Endowment account holders of the balance of the 128 funds eligible for distributions chose, instead, to reinvest them into their accounts' corpus.

MEANINGFUL IMPACT 2019 GRANT HIGHLIGHT

ST. CECILIA MUSIC MINISTRY: ST. JOHN THE EVANGELIST CATHOLIC CHURCH - CHIEFLAND

Contributed by Toni Davis and Julie Snow

The St. Cecilia Music Ministry, an outreach ministry of St. John the Evangelist Catholic Church in Chiefland, was inspired by St. Cecilia, patron saint of musicians, who is said to have heard heavenly music in her heart. Volunteer and singer, Ashlee Seoane travels 146 miles each weekend, from St. John the Evangelist Parish in Chiefland to St. Andrew Chapel in Cedar Key and Holy Cross Mission in Cross City, to provide liturgical music for the people who attend Mass in these rural areas. Without her ministry, music, a form of prayer to raise our hearts to God, would be absent. "Pope John Paul II stated "as a manifestation of the human spirit, music performs a function which is noble, unique and irreplaceable. When it is truly beautiful and inspired it speaks to us more than all the other arts of goodness, virtue, peace, and matters holy and divine. For good reason, it has always been, and it will always be, an essential part of the liturgy."

Ashlee and Fr. Cesar Torres-Pinzon, pastor, invites parishioners to join her in this ministry, and although they are enthusiastic about having music available, the remoteness of the area makes it difficult to find parishioners able to make a commitment. She is often the only source of music at services, but continues to offer the congregation this spiritual connection to the liturgy and to each other.

In 2019, the Catholic Foundation awarded a grant to St. John the Evangelist Catholic Church to launch the St. Cecilia Music Ministry. These essential funds help with travel expenses to ensure that this beautiful and fruitful ministry would be able to continue to provide the gift of liturgical music in a remote area of our diocese.

The Catholic Foundation provides financial assistance for religious, educational, and charitable works throughout the diocese through annual grant opportunities. The funds awarded are distributed from the earnings of the general fund of the foundation endowment and are made possible by the generous contributions of the Diocese of St. Augustine and individual donors.



Fr. Cesar Torres-Pinzon, Pastor

When there is music at Mass, it heightens the liturgical context so that it speaks more fully and effectively to those gathered. It also adds joy and enthusiasm within the parish community.



Ashlee Seoane, Volunteer Music Minister

"The music during Mass plays a very important role; from the moment the priest enters, through communion, and even into the prayerful time after receiving Christ. For many years we've struggled with our parish's music. The music grant from Catholic Foundation has made all of us who attend Mass regularly, look forward to a pleasant musical service leading to a deeper prayerful feeling in our hearts."

Parishioner of St. John the Evangelist – Chiefland

To learn more about how Foundation grants are making and impact in our diocese visit www.dosafl.com/catholic-foundation/.

A large, detailed portrait of Augustin Verot, the first Bishop of the Diocese of St. Augustine, serves as the background for the top half of the page. He is depicted from the chest up, wearing a dark, high-collared clerical garment with a white ruffled shirt underneath. His expression is serious and contemplative.

MEANINGFUL IMPACT, THROUGH INSPIRED GIVING.



Augustin Verot, first Bishop of the Diocese of St. Augustine, had an abiding commitment to the growth and impact of the Church through education, Catholic teaching, and vocations. The Order of Augustin Verot recognizes the importance of planned gifts – bequests and other legacy gifts, supporting the work of our Church in North Florida for generations to come.

Membership in the Order of Augustine Verot is reserved for those generous individuals who notify the Catholic Foundation that they have made estate or other gift plans to benefit their parish, school, or a beloved ministry.

If you have made a faith legacy gift plan including our Church in North Florida and you are not listed among our valued OAV members, please let us know. Cliff Evans, planned giving officer, is happy to help you register your gift intentions and add you to our legacy society membership.

ORDER OF AUGUSTIN VEROT FAITH LEGACY GIVING

Dr. Maria Acosta-Rua
 Ms. Judith Adkins
 Mark & Rita Allen
 Mr. & Mrs. John Anderson
 Elmer Aponte
 Dennis M. & Mary H. Axman
 Mr. & Mrs. Charles Baer
 Ms. Kathleen Bagg
 Maximo & Sylvia Balbarez
 Donald Ballish
 Mr. & Mrs. Edward Barbarito
 Martha Barrett
 Mr. Raymond Basso
 Mrs. Doris Baumgartner
 Marilyn & Anthony Belo
 Mr. Frank Benischek
 Mrs. Lisa Benton
 MG Paul & Janet Bergson
 Mr. Leo Blatz
 Rev. James Boddie
 Mr. & Mrs. Ernest Bono
 Mr. & Mrs. Kevin Brown
 Mr. & Mrs. Joseph Brozovich
 Mr. & Mrs. Brian Cabrey
 Stanton L. Cadow, CFRE, ECRF
 Mrs. Gertrude Cameron †
 Juanita R. Campbell
 Mr. & Mrs. Michael Cascone, Jr.
 Mr. Victor Chew
 Mr. & Mrs. Thomas Claridge
 Rev. Peter Colasurdo
 Mr. Wayne Colvin
 Mrs. Jacqueline Comstock
 Mr. & Mrs. Tommy Crowder
 Mrs. Marlise Cusick
 Mr. & Mrs. Eugene Dagg
 Concetta DeLisi
 Mrs. Betty Demetree
 Mr. & Mrs. Louis DePetris
 George & Pam Dewey
 Mr. Cosmo DiPerna
 Mrs. Patricia K. DiSandro
 Dr. & Mrs. Walter Eaton
 Mr. & Mrs. James Eckert
 Allison Le Elias
 Mr. & Mrs. Jerry Ellis
 Mr. & Mrs. Rodolfo Engmann
 Dick & Diane Erickson
 Most Rev. Felipe J. Estévez
 Cliff & Debbie Evans
 Lee M. & Nancy S. Evans
 Mrs. Doris Faustini
 Ms. Alice Ferrari
 Mrs. Shirley Fewox

Beverly & Michael Flanagan
 Edward James Fleming, Jr. & Debora Ann Fleming
 Mrs. Judith Franklin
 Mrs. Gail Gaines
 Ms. Mary Gallagher
 Ron & M.J. Ginder
 Mrs. Carole Ginzl
 Mrs. Joan Giordano
 Mr. & Mrs. John Gribbin
 Deacon & Mrs. Larry Hart
 Msgr. Vincent Haut
 Mr. & Mrs. John Hay
 Mr. & Mrs. Kurt Hearth
 Mrs. Margaret Helow
 Msgr. James Heslin
 Mr. & Mrs. Donald Hollingsworth
 Rev. Michael Houle, EV
 Dr. Mary Hughes
 Ms. Barbara Jackson
 Mr. & Mrs. William Joos
 Hobart Joost, Jr.
 Robert W. & Cynthia Kastner
 Paul & Kathy Kerins
 Ms. Karen King
 Mr. & Mrs. James Knutzen
 Msgr. Eugene C. Kohls, J.C.D.
 Mr. & Mrs. Henry Kuhnert
 Janet LaFrance
 Ms. Dorothy Legere †
 Ms. Mary L'esperance
 Mrs. Rose-Marie Lewis
 Ms. Audrey Loos
 John & Katherine T. Lowe Charitable Remainder Trust
 Michael A. Marconi
 Alfred J. Martin
 Mrs. Patty Martinez
 James & Joanne Marx
 Mrs. John H. McCormack, Jr.
 Sister Louise Thayer McEachern
 Dr. Terence & Mrs. Erin McGee
 John & Ana McLaughlin
 Mr. & Mrs. William B. McMenemy
 Michael J. & Carol A. McNamara
 Mrs. Gloria Mendez
 Ms. Gail Middleton
 Mrs. Teresa Milam †
 Mr. & Mrs. Richard Miller
 Mr. & Mrs. Ricardo Morales
 Mr. & Mrs. John Morrissey
 Mr. & Mrs. Philip J. Moses, Jr.
 Michael & Faith Murray
 Mr. & Mrs. Ronald Natale
 CH (Maj.) James O'Neal
 Ms. Mollie O'Neill

Mr. & Mrs. Ramzi Ossi
 Mr. V.E. Palmer
 Father Fred Parke
 Rev. Lawrence Peck
 Mrs. Saralee Peters †
 Elizabeth H. Phelps
 Mr. & Mrs. John Pinson
 Mr. & Mrs. Thomas Place
 Ms. Denis Plumb
 Mr. & Mrs. Warren Powers
 Ms. Nancy Powers
 Ms. Lucina Presbitero †
 Mrs. Irene Puleo
 Michael P. & Teresa A. Radzinski
 Mrs. Victoria Reigel
 Mr. & Mrs. Ramon Reyes
 Mrs. Dianne Rice
 Ms. Patricia Robinson
 Mr. & Mrs. Tancredi Rucci
 Mr. & Mrs. Patrick Russell
 Ms. Mary Ryan
 Gerald R. Schmidt
 Mrs. Barbara Scholtz
 Mr. & Mrs. Kenneth Shafer
 Mr.(t) & Mrs. Robert T. Shircliff
 Mrs. Alicia Sierra-Reyes
 Ms. Marjorie Simpson
 Ms. Gayle Smith
 Most Rev. John J. Snyder †
 Mr. & Mrs. Philip Sotomayor
 Mr. & Mrs. Jerome Swietnicki
 Mr. & Mrs. Glynn Thomas
 Ms. Patricia Thomas
 Ken & Cindy Thompson
 William & Patricia Tierney
 Jerry Veierstahler
 Mr. & Mrs. Carlos Vides
 Mr. & Mrs. &y Wade
 Mr. John Walsh
 Mr. & Mrs. Louis Walsh
 Mr. & Mrs. Gerald Weedon
 Mr. & Mrs. Harold Westover
 Mrs. Mari White
 Mrs. Rose White
 Jerome & Christie Wilamowski
 Deacon David & Karen Williams Family Fund
 Mrs. Rosita Williams
 Very Rev. Thomas S. Willis
 M. Elaine Zurek & Timothy T. Wojciechowski
 Judy A. Wolford
 Mr. & Mrs. Alton Yates
 Katharine K. Zambetti
 † deceased

ABOUT THE CATHOLIC FOUNDATION

What does the Catholic Foundation do?

The Foundation establishes and manages permanent endowment fund accounts created to provide lasting support for the development and charity of our faith community. It offers practical partnerships to encourage giving generously now and through future, legacy gifts.

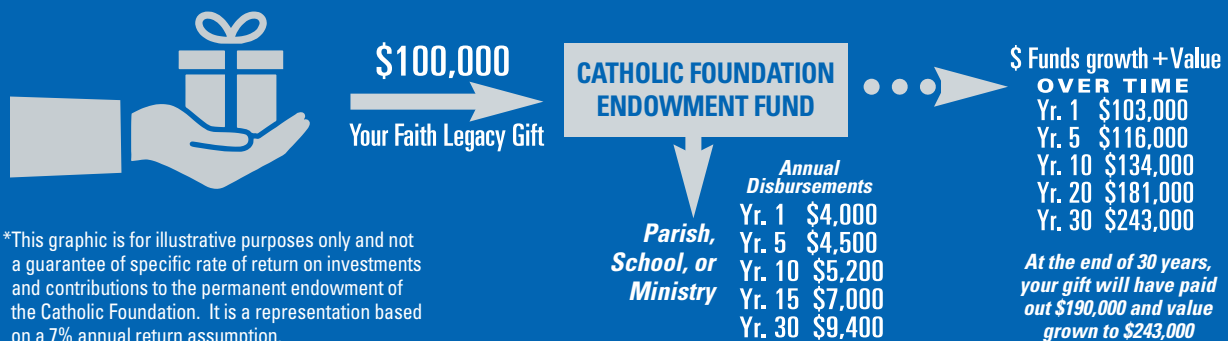
How are Foundation operations funded?

Each endowment fund entity can receive an annual disbursement of 4% of the market value of its permanent account. Funds not restricted to any specific parish, school, or ministry are used at 4% annually, to fund operational expenses as well as fund annual grant awards that are presented to selected applicants. A ¾% organizational fee is charged to each entity to help with operations.

What are the advantages of endowment fund giving?

Funds gifted to an endowment account are held in perpetuity – the principal cannot be spent and will be invested prudently. These investments are made in accordance with Catholic values and social teaching and are supervised by our Board of Directors in addition to the offices of the Bishop and Fiscal.

Even after annual disbursements of 4% are taken, the endowments have continued to grow over time – due to sound investment practices and consistent oversight. The chart below illustrates the lasting value and impact of gifts to our permanent endowment.



To live our Catholic faith and create sustainable growth and partnerships with parishes, schools, ministries, and donors, in order to build a strong future where the faithful can fully and generously live out their baptismal call.

» FAITH

Faithfully serving others in the name of the Lord

» INTEGRITY

Adhering to the highest ethical and professional standards

» PARTNERSHIP

Building relationships among parishes

» SUSTAINABILITY

Ensuring the growth of the Church for future generations through responsible stewardship of generous gifts and resources

OUR VALUES

2018-2019 BOARD OF DIRECTORS

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Bishop of St. Augustine

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Development & Planned Giving Committee
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Mr. Michael Maguire
Finance Committee
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Mr. William McCamy
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Finance Committee
Epiphany

Mr. Sidney Simmons
Grants Review Committee
St. Paul - Jacksonville

Mr. Kenneth Thompson
Development & Planned Giving Committee
Holy Family - Jacksonville

Dcn. David Williams
Chancellor

2019 ANNUAL MEETING



Rev. Michael Houle with Immediate Past Chair, Michael McNamara.



Bishop John J. Snyder Legacy Leadership Award recipient Msgr. Vincent Haut selected Basilica of the Immaculate Conception's endowment account as recipient of the \$1,000 award. Pastor, Fr. Blair Gaynes, gratefully received the funds.

Mrs. Patricia DiSandro
Executive Director

Mr. Steve Bell
Chief Financial Officer

Mr. Tim Cebulko, CFA, CFP
Financial Advisor

2018-2019 PLANNED GIVING ADVISORY COMMITTEE

John Anderson Jr.
Anderson Financial Partners

David Baker
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Jud Durel
Morgan Stanley Wealth Management

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Augustine Asset Management

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James Knutzen & Associates (Retired)

Patrick Macabasco
Ameris Bank

William McMenemy
Donahoo & McMenemy, PA

Christopher Thompson
Wells Fargo Advisors

Ken Thompson
Wells Fargo Private Bank



Meet Cliff Evans

Catholic Foundation Planned Giving Officer

Thank you for your generous stewardship for the work of our Church in North Florida. I'm ready to help you and your family discover how to create a lasting faith legacy by supporting our Church in North Florida and its vital work in our parishes, schools, and ministries.

Call me at 904-208-6931, cevans@dosafll.com, or visit our website dosafll.giftplans.org for more information.

Staff

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Kim Howard, Planned Giving Assistant
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“WHAT IS THE KINGDOM OF GOD LIKE? *To what can I compare it?* It is like a mustard seed that a person took and planted in the garden. When it was fully grown, it became a large bush and ‘the birds of the sky dwelt in its branches.’”

LK 13; 18-19 (USCCB)
The Parable of the Mustard Seed

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904-262-3200 | www.dosafl.com/catholic-foundation/

Catholic Foundation
DIOCESE OF ST. AUGUSTINE 