

Adapting to Serve Our Community's Changing Needs



**The Catholic Foundation
of Central Florida**
Inspire Giving. Fund God's Work.



Spiritually Connected

2020
MPAC
REPORT

Faith Based Investment Management
Engaging Donor Experiences
Community Leadership and Impact

Faith-filled Passion - Collaboration - Stewardship - Transparency - Servant Leadership - Impact Lives

TABLE OF CONTENTS

Bishop and Chairman Letters	3-4
Our Board and Team	5
Faith-Based Investments	6-15
The Philanthropic Journey.....	16-17
St. Katharine Drexel Society	18
Planned Giving Advisory Council.....	19
Adapting to Meet Community Needs	20-21
Vivos Christi Society & Legacy Gifts.....	22
“Evening of Gratitude”	23
Financial Statements.....	24-25
Our Catholic Appeal and Shepherd’s Fund.....	26
Our Catholic Appeal Societies	27-28
Capital Campaign.....	29
Offertory Enhancement Initiative	30
Awards and Recognition	31



Comfort, give
comfort to my
people, says
your God.

Isaiah 40:1

My Sisters and Brothers in Christ:

In the first week of Advent, we receive the words of the prophet Isaiah, who tells us God provides us comfort. How beautiful are these words as we have travelled most of 2020 in quarantine. How we long for God's comfort—His touch of mercy, His anointing of hope, His breath of love!

Emmanuel – God with us – has, is and always will be. During this time particularly we rejoice mightily in our most precious gift of life; that of one another. Through our daily living as God's people, we have His comfort because we bring His comfort to each other. We are spiritually connected through the Eucharist and it is in the Eucharist that we are fed to be His Presence in our world.

The ministry of The Catholic Foundation of Central Florida is to steward our financial gifts in a way that spreads God's goodness within the Diocese of Orlando. Your donations to Our Catholic Appeal, the Shepherd's Fund, various Diocesan endowments, or your participation in a donor advised fund extend God's arms to hold each other in comfort. Whether it is a home refurbished after disaster or medical care for a wound or counseling for the forsaken or technological enhancements for parishes to bring the Word of God to parishioners or special training for principals, teachers, and catechists to create a virtual environment of Catholic education or podcasts about issues of the day, you gave comfort to God's people in His name.

This document reports on preparing the way of the Lord. You are, through your participation with The Catholic Foundation of Central Florida, building a highway for our God. As you open and read this annual report, praise God for entrusting us to lead His people with care; for making His comfort known throughout the nine counties of Central Florida.

Sincerely yours in Christ,

Most Reverend John Noonan
Bishop of Orlando



From The Chairman

It has been an honor in my first year as Chairman to serve generous donors like you, as well as our clergy, the Diocese of Orlando, and broader community as we face unprecedented times caused by the coronavirus pandemic. Everything that we have accomplished is because of The Lord's grace and our blessed partnership with benevolent donors like you.

In the past year, The Catholic Foundation's board and staff have adapted to our community's and partners' evolving needs to ensure that our faith community remained spiritually connected even when parish buildings were closed for several months early in the pandemic. Within days of the pandemic's arrival, our board approved an initial investment of \$10,000 to seed the Mercy Fund and an additional \$15,000 to match donations to this fund. Generous donors helped raise more than \$60,000 for The Mercy Fund, which supports Catholic Charities of Central Florida in their efforts to respond to our community's increased needs since the arrival of the pandemic for food, housing, utilities, and behavioral health assistance.

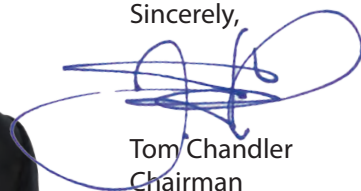
The Catholic Foundation team responded quickly when organizers of the philanthropy movement "Giving Tuesday" created a version called "GivingTuesdayNow" in May to respond to community urgencies caused by the coronavirus. In one week's time, The Catholic Foundation staff rebranded the "GivingTuesdayNow" philanthropic event as "GivingCatholicNow" and partnered with generous donors to raise more than \$40,000 to support 88 Catholic parishes, schools and ministries in Central Florida. As the pandemic continued, The Catholic Foundation staff served pastors by sharing evidence-based practices to help parishioners remain spiritually connected while parish buildings remained closed. Our team provided guidance and support with virtual events, live-stream messaging, email communication, and keeping parish websites updated with timely information and online donation options.

As Chairman, I have worked this year with The Catholic Foundation board and staff to ensure that we harmonize our efforts and strategy in ways that best support the vision of Bishop John Noonan and his Diocese of Orlando team to build a vibrant Catholic community in Central Florida. As the pandemic stretches on, it is critical that The Catholic Foundation understands and adapts to support our partner's changing needs so that we efficiently steward vital resources that improve community life. We have adapted as needed while maintaining focus on the vision of our 2019-2021 Strategic Plan. We have worked to ensure that our board understands what The Catholic Foundation staff needs to succeed with the strategic plan's implementation. We also created task forces to help our board engage more fully with their governance roles and improve how we lead The Catholic Foundation.

To better prepare for the future, I am looking for ways to diversify The Catholic Foundation's board structure so that our members are representative of our diocese, which will add valuable perspective. I am taking time to meet with potential candidates to discuss both the opportunity and expectation associated with serving on The Catholic Foundation board because our community depends deeply on the work that we do.

Thank you for your support and allowing me to serve as Chairman. The Catholic Foundation board, staff and I look forward to serving you even more effectively in the year ahead. God bless you.

Sincerely,



Tom Chandler
Chairman

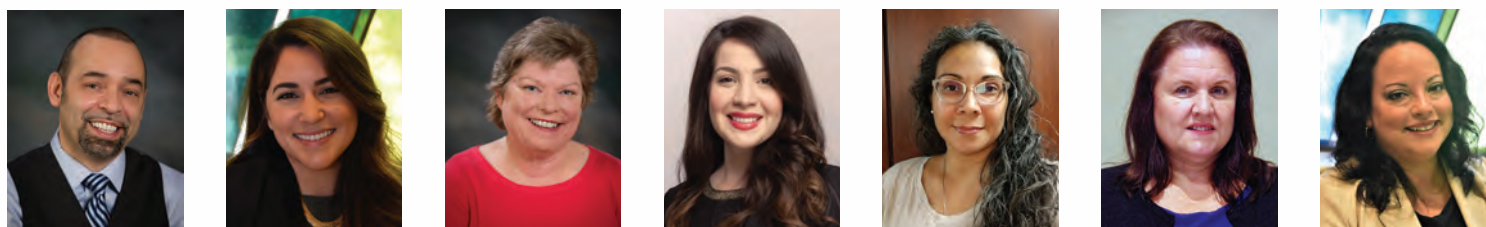


Our Board



Left to right top row: Thomas Chandler, John R. Kancilia, Sister Maria Teresa Acosta, Kevin F. Bowler, David Dennis, Orlando L. Evora, Very Rev. John C. Giel, Ron Henkelman, **Second row:** Allan E. Keen, Karen Monteleone, Very Rev. Ivan Olmo, David R. Ramos, Richard Strube, Lori Tolland, Very Rev. Richard Trout, Stephen Zepf, Victor Zollo **Not Pictured:** James A. Croson

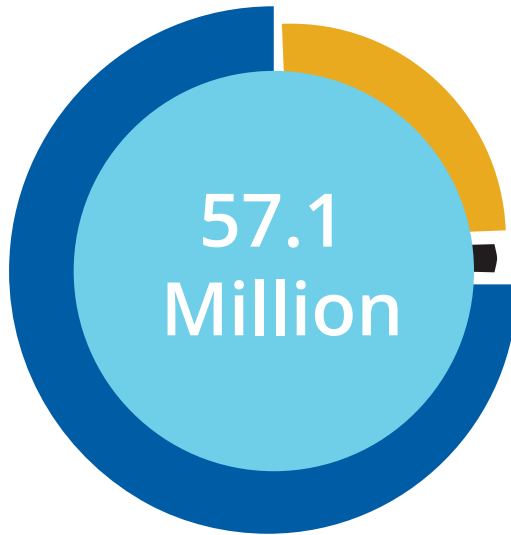
Our Team



Left to right top row: Kimberlee Riley, Rosie Camous, Janet Caramello, Shana Coulthurst, Susan Diaz, Carolyn Ell, George Garcia
Second row: Rafael Gerena, Teresa Herrán, Susan Hunt, Diana Loayza Garcia, Gessie Lopez, Stephanie Patel, Doris Quinones
Third row: Marco Robles, Crystal St. Julien, Dana Swanson, Marta Sweeney, Madelyn Weed

\$57.1 Million Total Assets Under Management

Figures as of June 30, 2020



Total Assets Under Management

Endowment Funds (116 Funds) \$51.0 Million

Reserve Funds (19 Funds) \$5.9 Million

Donor Advised Funds (2) \$164 Thousand

Areas of Interest Supported (Market Value)

Parish Life: 18.8 Million

Catholic Education: 18.0 Million

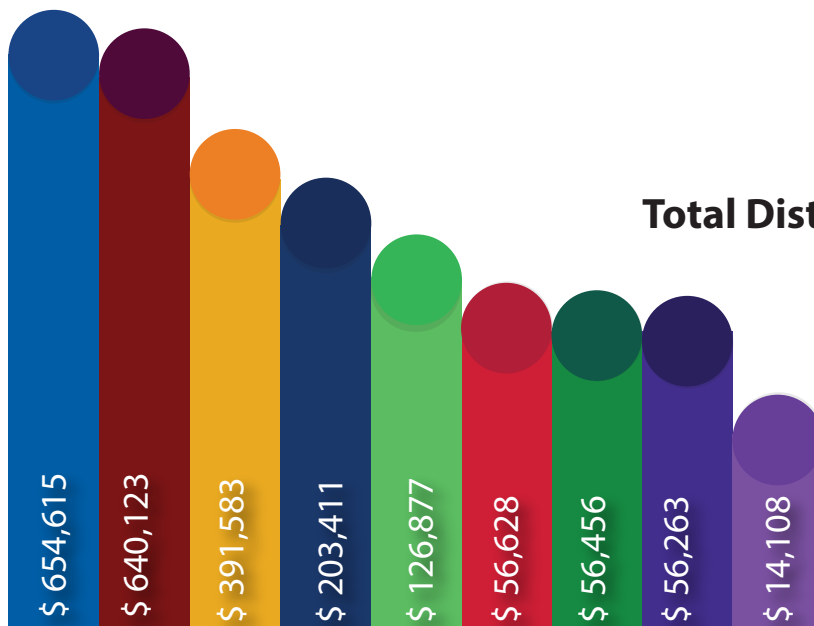
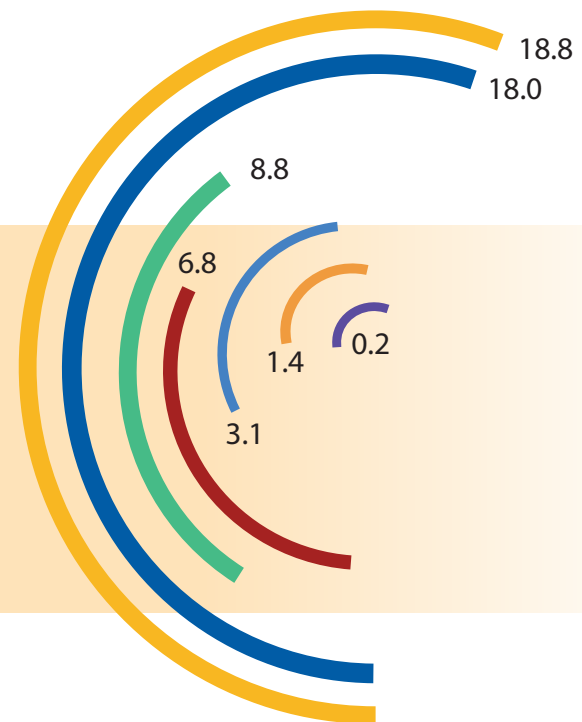
Church Leadership and Development: 8.8 Million

Outreach Ministries: 6.8 Million

Clerical Life: 3.1 Million

Catholic College and University: 1.4 Million

Donor Advised Fund: 0.2 Million



Total Distributions \$2.2 Million (All Funds)

Scholarship/Tuition Assistance: \$654,615

Parish Support: \$640,123

Ministry Support: \$391,583

Catholic Charities: \$203,411

Donor Services: \$126,877

Polk County Charity: \$56,628

Catholic Campus Ministry: \$56,456

Priest Retirement: \$56,263

Bishop Grady Villas: \$14,108

Permanently Endowed Fund Investment

\$51 Million in 116 Funds

Growth-oriented investment approach to generate returns in excess of spending and inflation.

Permanent investments provide meaningful exposure to risk over time.

Endowments provide funding for current as well as future needs.

Annual distributions — 3-5% of market value, corpus preserved.

Reserve Fund Investment

\$5.9 Million in 19 Funds

Funds are not permanently restricted.

Funds distributed as requested and in accordance with donor/parish intent.

Corpus can be preserved by parish intent.

Investments based on time horizon of parish, school or ministry funding needs.

3-5 Year Reserve: preservation of capital and income.

5+ Year Reserve: Growth of capital and current income generation.



Endowments

Catholic College and University: Total \$1.4 Million

Catholic Campus Ministry Endowment Fund
Catholic Campus Ministry Endowment Fund (AIC)

Catholic Education: Total \$18 Million

Adelaida Valdes Endowment Fund
AIC Tuition Assistance
Deforest W. and Margaret Y. Bullard Scholarship Fund
Fr. Frank Zammit Endowment Fund
Our Lady of Hope Catholic Education Endowment Fund
Our Lady of Lourdes (Melbourne) School Endowment Fund
Resurrection Catholic School Endowment Fund
*Richard L. & Rita C. Lienenbrink Scholarship Endowment
St. Timothy Catholic Church Educational Endowment Fund
The St. Teresa Catholic School Endowment Fund
Tuition Assistance Scholarship Endowment Fund
Xavier Leyva Quintana Scholarship Endowment Fund

Bishop Moore

Ann Hefferin Memorial Endowment Fund
Dave Powers Memorial Endowment Fund
Dawn Michelle Aberwald Memorial Endowment Fund
*Gary Burkey Student-Athlete Endowment Fund
Guardian Angel Endowment Fund
Joe Skinner Endowment Fund
Kelly Reen Memorial Fund
Robert J. Peterson Memorial Endowment Fund

Bishop Moore and Morning Star

The Michael Scheve Endowment Fund

* New Fund

Church of Our Saviour Catholic School

Church of Our Saviour Catholic School Endowment
Fr. Sean Heslin Scholarship Endowment Fund

Father Lopez

Bud Farmer Scholarship Fund
Leonard T. (Pat) Murphy Scholarship Endowment
The Dorothy and Walter Shelley Family Scholarship Endowment Fund
The Henry S. Sitkowski Memorial Scholarship Endowment
The Ian A. Gilmore Memorial Scholarship Endowment
The Jillian Elizabeth Blais Memorial Scholarship Endowment Fund
The Sylvia Hope Horrigan Memorial Scholarship Endowment

Morning Star

Joe Cadden Memorial Scholarship Endowment Fund

St. John Vianney Catholic School

St. John Vianney Catholic School Endowment Fund
The Sister Elizabeth Murphy Tuition Assistance Fund

Church Leadership and Development: Total \$ 8.8 Million

Recruiting and Forming Clergy and Lay Leaders Endowment Fund (AIC)
The Catholic Foundation of Central Florida Endowment Fund

Clerical Life: Total \$3 Million

Bishop Dorsey Endowment
*Degel Family Endowment Fund for Seminarians
Priests' Retirement Fund
Prince-Olson Family Vocation Scholarship Endowment Fund
Seminarians Fund



Outreach Ministries: Total \$5.8 Million

Bishop Grady Villas Sr. Elizabeth Marie Stoup Endowment Fund
Bishop Thomas G. Wenski Endowment Fund for Charity
Catholic Charities Endowment Fund (AIC)
Catholic Charities of Central Florida, Inc. Endowment Fund
The Hackl Family Endowment for Charity

Parish Life: Total \$14 Million

Albert J. and Christine M. Hackl Endowment Fund for the Benefit of Holy Spirit Church
All Souls Catholic Church Capital Improvement Fund
All Souls Catholic Church Endowment Fund
Annunciation Catholic Church Endowment Fund
Ascension Catholic Church Endowment Fund
Basilica of St. Paul Endowment Fund
Blessed Sacrament Catholic Church, Clermont Endowment Fund
Blessed Trinity Catholic Church, Ocala, Endowment Fund
Blessed Trinity Catholic Church, Orlando Endowment Fund
Church of our Saviour Endowment Fund
Church of the Epiphany Endowment Fund
Church of the Nativity Endowment Fund
Corpus Christi Catholic Church Endowment Fund
Divine Mercy Catholic Church Endowment Fund
Fred Enck Justice Ministry Endowment Fund
Holy Family Catholic Church Endowment Fund
Holy Name of Jesus Catholic Church Endowment Fund
Holy Redeemer Catholic School Endowment Fund
Holy Spirit Catholic Church, Lake Wales Endowment Fund
Holy Spirit Catholic Church, Mims Endowment Fund
Immaculate Conception Catholic Church Endowment Fund
Immaculate Heart of Mary Catholic Church Endowment Fund
*Monsignor Harte Memorial Care of the Basilica Endowment
Most Precious Blood Catholic Church Endowment Fund
Our Lady of Grace Catholic Church Endowment Fund
Our Lady of Hope Catholic Church Endowment Fund
Our Lady of Lourdes Catholic Church, Daytona Beach Endowment Fund
Our Lady of Lourdes Catholic Church, Melbourne Endowment Fund
Our Lady of the Springs Catholic Church Endowment Fund

Our Lady Star of the Sea Endowment Fund

*Prince of Peace Catholic Church Endowment Fund
Queen of Peace Catholic Church Endowment Fund
Resurrection Catholic Church, Winter Garden Endowment Fund
Sacred Heart Catholic Church Endowment Fund
St. Andrew Catholic Church Endowment Fund
St. Ann Catholic Church, Debary Endowment Fund
St. Ann Catholic Community, Haines City Endowment Fund
St. Anthony Catholic Church Endowment Fund
St. Augustine Catholic Church Endowment Fund
St. Brendan Catholic Church Endowment Fund
St. Catherine of Siena Catholic Church Endowment Fund
St. Charles Borromeo Catholic Church Endowment Fund
St. Faustina Catholic Church Endowment Fund
St. Francis of Assisi Catholic Church Endowment Fund
St. James Cathedral Endowment Fund
St. John Neumann Catholic Church Endowment Fund
St. John Vianney Catholic Church Endowment Fund
St. Joseph Catholic Church, Orlando Endowment Fund
St. Joseph Catholic Church, Palm Bay Endowment Fund
St. Joseph Catholic Church, Winter Haven Endowment Fund
St. Joseph, Lakeland, Catholic Church Endowment Fund
St. Margaret Mary Catholic Church Endowment Fund
St. Mark the Evangelist Catholic Church Endowment Fund
St. Mary Catholic Church Endowment Fund
St. Mary of the Lakes Catholic Church Endowment Fund
St. Matthew Catholic Church Endowment Fund
St. Matthew Catholic Church Endowment Fund (OCA)
St. Maximilian Kolbe Catholic Church Endowment Fund
St. Patrick Catholic Church Endowment Fund
St. Paul Catholic Church Endowment Fund
St. Peter Catholic Church Endowment Fund
St. Philip Phan Van Minh Endowment Fund
St. Stephen Catholic Church Endowment Fund
St. Teresa Catholic Church, Titusville Endowment Fund
St. Theresa Catholic Church, Belleview Endowment Fund
St. Timothy Catholic Church Endowment Fund
St. Vincent de Paul Catholic Church Endowment Fund
Sts. Peter and Paul Catholic Church Endowment Fund
The assets of the Endowment Fund of the Basilica of Mary Queen of the Universe Shrine



Reserve Funds

Catholic Education: Total \$50,300

Joint Investment Fund of John Kevin Doyle Memorial Fund, Coto Family Fund and Perrault Family Fund

Church Leadership and Development: Total \$45,000

The Catholic Foundation of Central Florida Distribution Holding Fund

*Deacons 5+ Year Reserve Fund

Clerical Life: Total \$61,000

Seminarians - Dorsey

Seminarians - Other Quasi Endowment



Outreach Ministries: Total \$1 Million

Bishop Grady Villas Temporarily Restricted Fund

*Central Florida Catholic Mercy Fund

*The Affordable Housing Fund

The Shepherd's Fund

Parish Life: Total \$4.8 Million

Blessed Trinity, Ocala 3-5 Year Reserve Fund

Charles "Chuck" Murray & Elizabeth "Betty" Murray Fund for Centro Guadalupe

Church of Our Saviour Quasi-Endowment Fund

Fr. Paul Kamide Fund for the Epiphany Help Center

Resurrection Catholic Church, Lakeland Quasi Endowment Fund

St. Mary of the Lakes Quasi-Endowment Fund

*St. Matthew Quasi-Endowment Fund

*St. Thomas Aquinas 3-5 Year Reserve Fund

*St. Thomas Aquinas Catholic Church 5+ Year Reserve Fund

* New Fund



The Catholic Foundation of Central Florida partners with donors to grow the Kingdom of God by providing opportunities to invest in the life of the Church – for today, and for all time. Through donations to an existing Endowment or Reserve Fund, you build the long-term financial well-being of our parishes, schools, and other ministries of the Diocese of Orlando. Donations can be made online at cfocf.org/funds. Donations can also be made through stock or other non-cash gift by contacting Susan Hunt at 407-246-4803 or shunt@cfocf.org.



New Reserve Fund

Central Florida Catholic Mercy Fund

*"As we monitor the turn of events throughout the world
we are reminded of our common humanity..."*

Donors gave
\$60,740

to support the increased needs in our community for food, housing assistance and behavioral healthcare since the arrival of the pandemic.

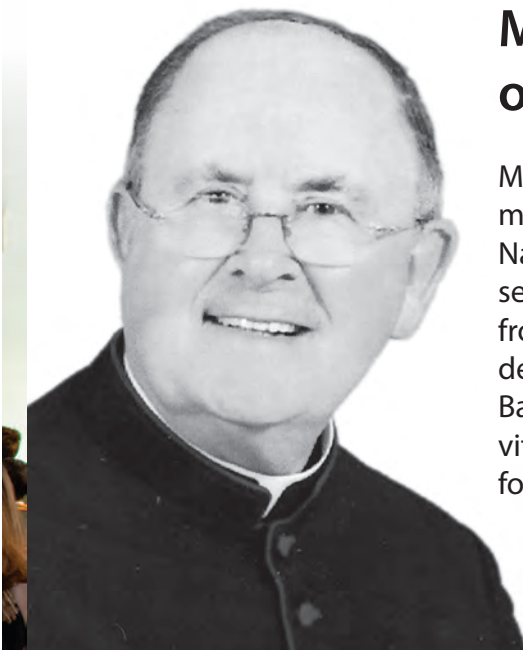
The Central Florida Catholic Mercy Fund was created in March 2020 as a response to the increased needs of individuals, families, children and seniors in the nine counties of the Diocese of Orlando as a result of the coronavirus pandemic. The Mercy Fund supports Catholic Charities of Central Florida in their efforts to respond to these needs including maintaining stock in the Agape Mission Markets and food pantries; counseling services and behavioral care coordination; and assistance with rent, utilities and daily needs such as prescriptions for those faced with unemployment and job instability.

The Catholic Foundation Board of Directors provided \$10,000 to seed the fund with a \$15,000 match and we are grateful for an anonymous donor who provided another \$2,500 match; Michael and Aimee Kakos who provided another \$4,000 match and others who have made donations exceeding these matches. We are also grateful for all the donors who partnered with us to leverage resources to address the increasing needs in our community.

New Endowment Fund

Monsignor Harte Memorial Care of the Basilica Endowment

Monsignor Fachtna Joseph Harte was instrumental in establishing the tourism ministry in the Diocese of Orlando which led to the building of the Basilica of the National Shrine of Mary, Queen of the Universe. This beautiful sacred treasure serves as a spiritual home away from home for countless travelers who come from near and far to renew their spirit with the grace of the Sacraments and their devotion to our Blessed Mother. The Monsignor Harte Memorial Care of the Basilica Endowment was established late in the year. It is quickly emerging as a vital resource to honor and ensure that the Basilica is stewarded and maintained for years to come, blessing thousands who visit annually for spiritual sanctuary.





Marian Contest

Share your favorite Marian title and how you express your devotion to Mary!

Engaging Young Catholics Enrolled in Faith Formation

Fr. Zammit Endowment Fund Sponsors Contest to grow devotion to Our Lady

The Marian Essay Contest was born out of Father Frank Zammit's passion for Catholic education and desire to grow our young Catholics' devotion to Mary. The annual contest was adapted this year to work with middle schoolers enrolled or engaged in Parish Faith Formation or Youth Ministry. The contest invited youth to express their devotion to Mary.

Winners shared \$1,150 in total prizes that included a scholarship or a gift to their favorite Catholic charity or religious order. The contest asked for either an essay, PowerPoint presentation or video sharing the middle schooler's favorite title for our Blessed Mary and why.

Father Frank Zammit, a retired priest in the Diocese of Orlando (now serving at St. Peter in Deland), is the contest's benefactor and innovator.



bit.ly/MarianVideo2020

Winners

First Place: Arman Sadri earned \$500 for faith education and \$500 for a Catholic entity

Second Place: Allie Burke earned \$100 for a Catholic entity

Third Place: Ricky Issac earned \$50 for a Catholic entity

Read the winning essays: bit.ly/MarianWinners2020



Investment and Asset Management



What is Catholic-Compliant Investing?

Catholic-compliant investing helps us to be good stewards of our financial gifts beyond simply increasing the value of those gifts. As Catholics, we are called to return our gifts to God with increase and to avoid benefiting personally from investments in companies engaged in work that opposes Gospel values.

The U.S. Council of Catholic Bishops (USCCB) has provided guidelines for Catholic investors sharing what socially responsible goals we should seek to promote and which practices must be avoided. These strategies are based on the moral demands posed by the virtues of prudence and justice.

Catholic Compliant Funds

99.5%
Compliance Rate

While some mutual funds may have exposure to investments which are not in compliance with USCCB guidelines, the potential exposure is only 0.5% of our total investment portfolio.

Catholic investment portfolios should:

- Protect Human Life
- Promote Human Dignity
- Reduce Arms Production
- Pursue Economic Justice
- Protect the Environment
- Encourage Corporate Responsibility



Home > [funds](#)

SHARE OUR SITE ON

Distinctive Faith Based Investing

Ensuring the long-term financial health and support of your favorite parish, school or diocesan ministry for years to come.



Endowment & Reserve Fundholders

This Investor Portal provides 24/7 access to your fund's growth and distribution information.

Donor Advised Fundholders

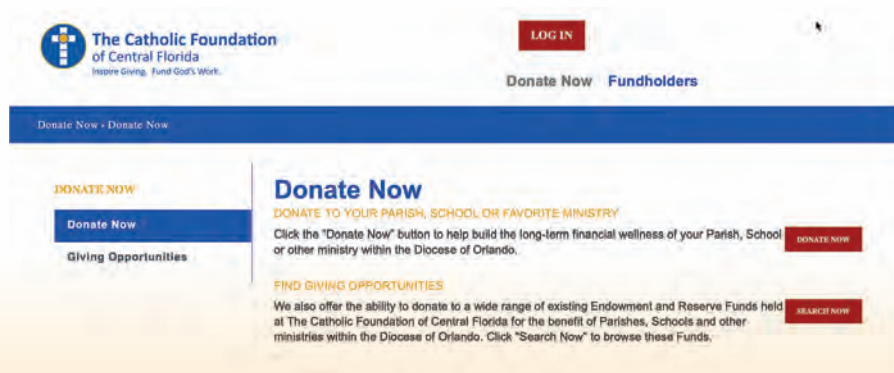
This Donor Portal provides 24/7 access to recommend grants, build your fund and review your DAF details.

Donate to Endowment Funds

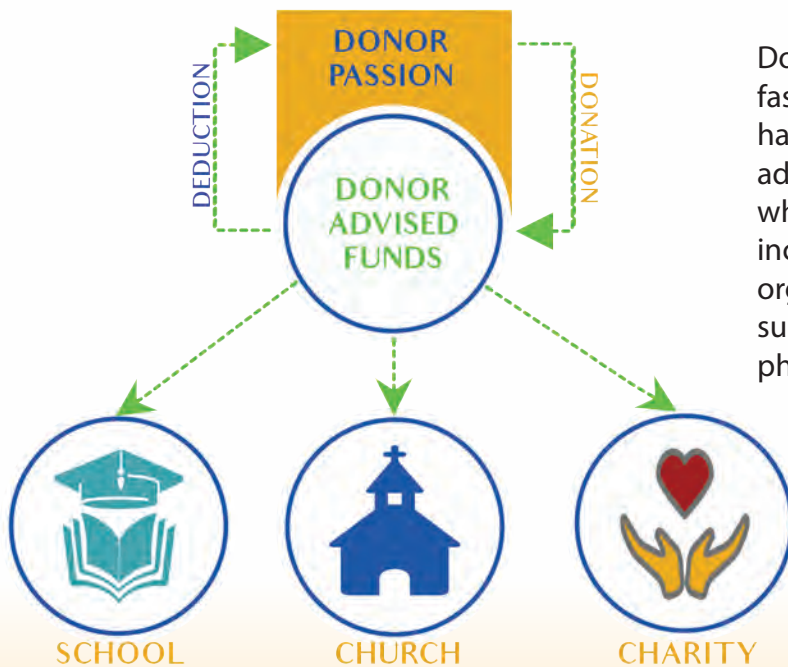
Your gift to an existing fund will build the long-term financial stability of your favorite parish, school or ministry.

New! Investor/Donor Advised Fundholder Portal

For more information, visit www.cfocf.org/funds



New! Donor Advised Funds



Donor Advised Funds (DAFs) are philanthropy's fastest growing vehicle for donations. A DAF is like having your own foundation (without the hassle and administrative fees!) The fund is invested for growth, which permits you, as the advisor, to make gifts of income and principal to multiple Catholic or public organizations while you are alive. You can also name successors so your family can continue your legacy of philanthropy for as long as the fund exists.

\$232,388 Invested
2: Funds Established

DAF Funds Established

The Father Walsh Donor Advised Fund
The Kevin Bowler Donor Advised Fund

*The Vogelpohl Family Endowed Donor Advised Fund will be established through a bequest.

DAF Grant Distributions

\$76,000

21 organizations supported

Hundreds of Nonprofits Supported by DAF Grants

www.cfocf.org/daf

2020: Nonprofits Supported





Left to right: Ann and Dave Vogelpohl. Kimberlee Riley and Janet Caramello of The Catholic Foundation.

Building Family Philanthropy

Planning the Vogelpohl Family Endowed Donor Advised Fund

Dave and Ann Vogelpohl, members of St. John Vianney Parish in Orlando, partnered with The Catholic Foundation of Central Florida to create a legacy plan that provided the opportunity for their children and grandchildren to perpetuate their love of Catholic values-based philanthropy.

Their estate plan includes inheritance for their children and grandchildren, including an educational trust and insurance policies. The bulk of their taxable assets will be left through the Endowed Donor Advised Fund which makes the most tax efficient option for distribution of their wealth. The fund will be established upon their passing and their children will serve as the fund advisors.

“A key part of our plan was to involve our children in managing the Endowment so that they develop their own sense of philanthropy that hopefully will include their choices for wealth management, which will include the inheritance we pass to them and their children directly.”

Read more about the Vogelpohl’s Philanthropic Journey by visiting: bit.ly/VogelpohlStory.

“Everything we have is from the Lord”

Dave and Ann Vogelpohl: Our Philosophy of Wealth

One of the basic lessons I learned from a young age is that God gives us everything we need. Growing up, both your mother and I, in our separate families, had everything we needed: love, caring, guidance, discipline, friends, relatives, and our physical needs met even though we were far from being financially wealthy. Our values regarding the important things in life were very much aligned and nearly the same as a result of our similar upbringing.

Read The Full Letter:
bit.ly/VogelpohlLetter

A Guide on your Philanthropic Journey

Together



Bringing our Church
throughout the World
to its *Fullness of Charity*.

We are blessed to partner with Catholics throughout Central Florida to fund God's work in serving the spiritual and corporal needs of our community and advancing the ministries of the Catholic Church in Central Florida.

We support individuals and families with achieving their philanthropic goals to impact lives through charitable giving in our diocesan and broader community. The professional staff provides educational services to both clergy and lay leadership as well as donors throughout the diocese on stewardship, charitable giving vehicles and legacy planning. We provide administrative services for processing of gifts and resources received via planned and legacy giving, donor advised fund giving, individual and family philanthropy.

**71 Stock Gift
Transactions**

\$891,597

177

**External Donor Advised
Fund Gifts Processed
\$317,542 Gift total**

INSPIRE
GIVING

STEWARDSHIP
GIFTS

DEEPEN
FAITH

SERVE
OTHERS

SUPPORT
COMMUNITY

IMPACT
LIVES



St. Katharine Drexel Society

The Catholic Foundation of Central Florida is excited to announce the establishment of the St. Katharine Drexel Society which recognizes the generosity of donors whose annual financial support for the ministry of The Catholic Foundation helped us to elevate philanthropy to flourish our Church ensuring its future and the fruits of generosity in Central Florida. Gifts directly to The Catholic Foundation generate a ripple effect across the community and will allow us to provide enhanced services to donors, parishes, schools and diocesan ministries throughout the Diocese of Orlando and impact lives in our broader community.

St. Katharine Drexel Society Members *(as of June 30, 2020)*

Anonymous (2)
William Balassone and Jean Ann Dunn
Gary and Marilyn Blanchette
Kevin and Jennie Bowler
Randy L. Means and Carol Brinati
Thinh Quang and Ngan-Chau Cao
Jim and Janet Caramello
Tom and Peggy Chandler
Ann Emmanuel
Orlando and Carolyn Evora
Barbara Fitzpatrick
Ron and Celeste Henkelman
John Kancilia
Allan and Linda Keen
Knights of Columbus - Council 7091
Gonzalo and Diana Loayza

Mark Manno
Wendy and Robert Mara
Donald and Susan Maravilla
Max W. Martins
Richard and Judy Newman
Very Reverend Ivan Olmo, V.F.
Timothy and Kimberlee Riley
Victoria Rodriguez
Sister Dorothy Sayers, M.P.F.
Ed and Carol Schwartz
John David Seal
James and †Adelyn Standridge
J. Timothy and Loretta Tolland
Reverend Richard W. Trout, V.F.
Saffie Wurie
Steve and Lori Zepf

† Members who have been called home to the Lord.

Born into a wealthy Philadelphia family, St. Katharine Drexel was impacted by the philanthropic legacy set by her parents who lived out their Catholic faith through charity, opening their home to the poor and distributing food and clothing.

She gave up her affluent lifestyle to enter religious life and used her inheritance to minister to the poor and oppressed. She founded the Sisters of the Blessed Sacrament, which provided for the physical and spiritual care for others through hospitals, shelters and educational institutions including more than 100 schools that served Native American reservations and Southern African American communities.

Saint John Paul II canonized Katharine Drexel in 2000. In his homily during the canonization Mass, he said: "Katharine Drexel is an excellent example of practical charity and generous solidarity with the less fortunate, which has long been the distinguishing mark of American Catholics."

As the Patron Saint of Philanthropy, the love of mankind, St. Katharine's philanthropy was a sacred call living out her faith in service to others and to the Church. Through St. Katharine's loving sacrifice of time, talent and treasure, she personified Christian stewardship and the commitment to give back to the Lord with increase.



"If we wish to serve
God and love our
neighbor well, We
must manifest our
joy in the service
we render to
Him and them."

- St. Katharine Drexel,
Patron Saint of Philanthropy



The Catholic Foundation
of Central Florida
PLANNED GIVING ADVISORY COUNCIL

Planned Giving Advisory Council

Our council comprises a group of active and talented charitable gift and estate planning professionals dedicated to the mission and vision of The Catholic Foundation of Central Florida. The goal is to support our community in realizing their philanthropic impact through a network of estate and financial planning professionals. The Catholic Foundation and the Advisory Council members provide educational and networking opportunities to support Central Florida professionals with incorporating distinct services that will help their clients realize the philanthropic impact they have already accomplished through their giving and connect them to resources to further their philanthropic journey.

Founding Members

Garrett M. Burke

Council Chair
Parishioner at St. Mary Magdalen
The Burke/Cox Group

Christopher Garcia, CFP®, MBA

Parishioner at St. Stephen
Vice President, Small Business Banker
Bank of America

Kathleen Hagerty

Parishioner at St. Margaret Mary
Assistant Vice President, Gift Planning
University of Central Florida

Ty McCormack, CFP®, AIF®

Parishioner at St. James Cathedral
401K Specialist/Wealth Advisor
Aksala Wealth Advisors

Ryan Plank, CFP®, CPFA

Parishioner at St. Margaret Mary
Assistant Vice President
Wealth Management Advisor
Merrill Lynch, Pierce, Fenner & Smith, Inc.

Steve Thagard MBA, CLU®, ChFC®, REBC®, CFP

Parishioner at St. Margaret Mary
Wealth Management Advisor
Northwest Mutual

Robert Thomson, CPA, PFS, AIF, MBA

Council Vice-Chair
Parishioner at St. James Cathedral
Chief Investment Officer
Trivergent Trust Company

Council Members (as of June 30, 2020)

Brendan Burke, CIMA, CRPC

Parishioner at Annunciation
Financial Advisor
The Burke/Cox Group

George Compton-Craig, JD

Parishioner at St. Margaret Mary
Attorney
Winship Law, PA

Darrell DeVaney, CFP

Parishioner at St. Margaret Mary
Founder & Chief Wealth Architect
F4 Wealth Advisors

James Faubert, AAMS

Parishioner at St. Joseph, Winter Haven
Financial Advisor
Edward Jones

Wendy Mara, JD

Council Chair
Eastern & Southern Deaneries
Parishioner at Prince of Peace
Principal Attorney
Mara Law, PA

Gregory Meier, JD

Parishioner at St. Margaret Mary
Attorney/Partner
Shuffield, Lowman & Wilson

Matthew O'Kane, JD

Parishioner at St. James Cathedral
Attorney/Shareholder
Lowndes, Drosdick, Droster,
Kantor & Reed, PA

Vanessa Skinner, JD

Parishioner at St. Stephen
Shareholder
Winderweedle, Haines,
Ward & Woodman, PA



Founding Members: Left to right: Kimberlee Riley (Staff), Garrett M. Burke, Robert Thomson, Christopher Garcia, Kathleen Hagerty, Ty McCormack, Steve Thagard, Janet Caramello (Staff)
Not Pictured: Ryan Plank



THANK YOU FOR SOCIAL DISTANCING

Keep a distance of around 6 feet from
people next to you in public

Adapting Services to Meet Community Needs

Supporting Parishes: Online Giving \$123,544

The Catholic Foundation adapted to offer a temporary online option for every parish during the pandemic. Generous donors responded to support their parishes through The Foundation's website.

Keeping Faith Communities Engaged

The Catholic Foundation shared evidence-based practices with parishes to help keep faith communities engaged, including the following digital tips when the pandemic arrived:

Virtual Events

Live Stream Mass Messaging

Website Updates

Parishioner Engagement Through Social Media

Engaging donors with their family
and connecting them to ministries
on their heart.

Find Ways To Make Community:

Making Community Spiritually While
Buildings Were Closed.

Supporting Fundholders

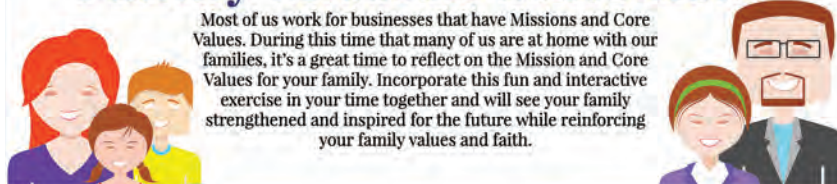
Providing timely meetings with
Foundation staff and investment
advisors for fundholders throughout
the pandemic via Zoom, sharing market
updates and strategies.

Supporting Our Faithful During Quarantine

bit.ly/CreateFamilyMissionStatement



Create a Family Mission Statement



Most of us work for businesses that have Missions and Core Values. During this time that many of us are at home with our families, it's a great time to reflect on the Mission and Core Values for your family. Incorporate this fun and interactive exercise in your time together and will see your family strengthened and inspired for the future while reinforcing your family values and faith.

Why create a Family Mission Statement?

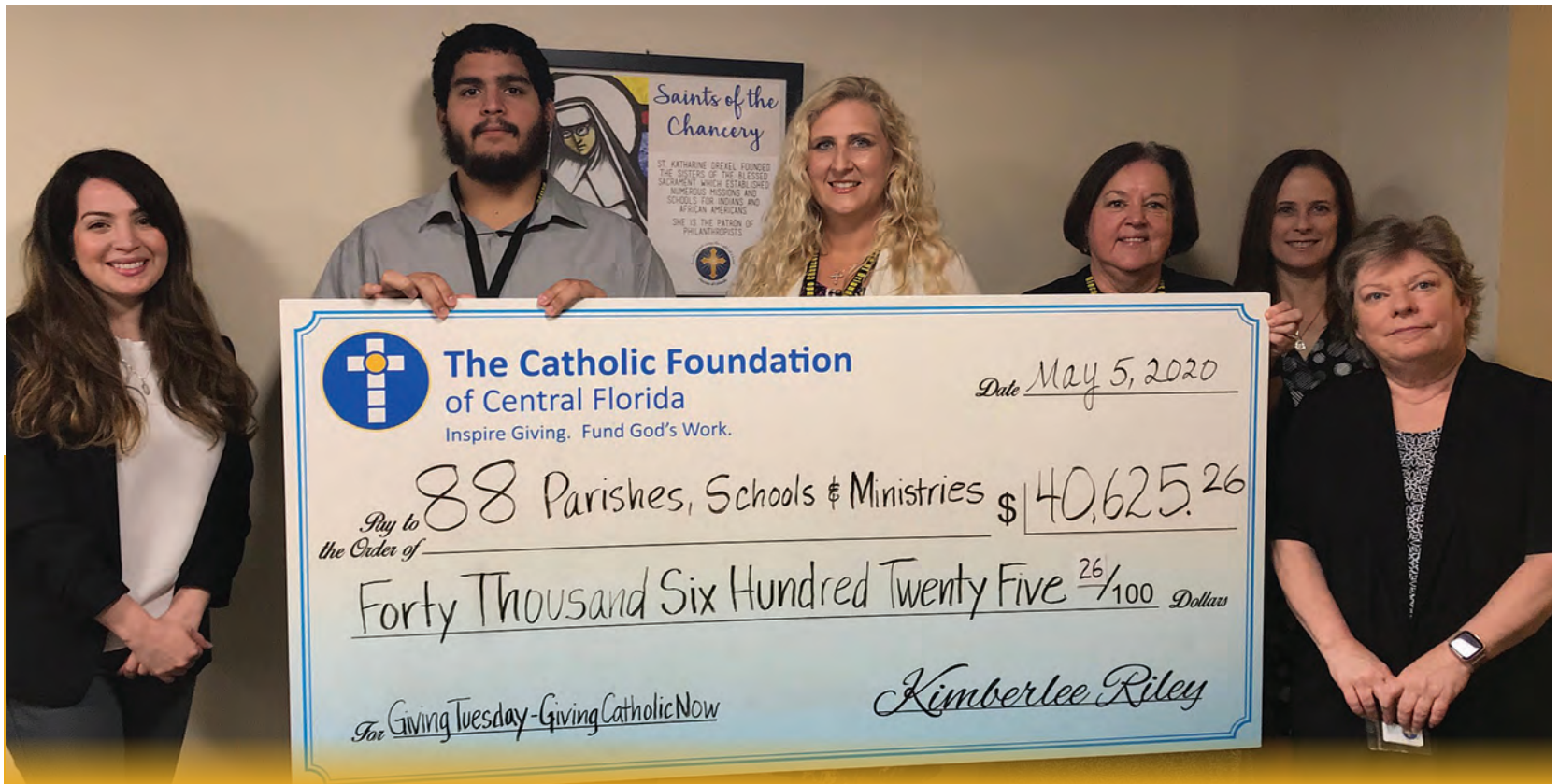
Having a shared sense of purpose and values help parents and children come together. It establishes ideals for each person in the family to strive for and assists them in choices, both individually and together. It also assists in guiding parents' decisions for the family.

Supporting Community



Central Florida Catholic Mercy Fund

"As we monitor the turn of events throughout the world
we are reminded of our common humanity..."



Additional Donor Impact:

Coming Together to Serve our Community in Times of Need

Giving Catholic Now:

Generous donors raised **\$40,625 in a 24-hour fundraising effort** to support 88 Catholic Parishes, Schools and Ministries amid the pandemic.



Disaster Relief:

Blessed donors raised **\$64,941** to assist victims of Hurricane Dorian and other storms.





Vivos Christi Society members are generous donors who have made a planned gift to their parish, school or ministry.

2020 New Members

Anonymous (11)

†Thomas A. Anzalone

Thomas J. Burns & Margaret E. Curran

Albert V. Colangelo & Elizabeth B. Colangelo

Dr. & Mrs. Dennis J. Dulniak

Mr. & Mrs. John Farrelly

†Marion F. Glowaski

†John Verner Hedberg & Mary Elsie Hedberg

Linda Eldredge Henderson, Class of 1965

Martin M. Kenneally

Elizabeth Mary Seaver

David and Ann Vogelpohl

† Members who have been called home to the Lord.



Left to right: Paul & Gaetana Bosley, Bishop John Noonan.

**"I learned the importance
of including our parish
in my will as part of my
tithe so our family is
now a proud contributor
to St. Patrick."**

Paul Bosley, Finance Council volunteer
at St. Patrick Catholic Church in Mt. Dora.

\$15.7 Million

Legacy Gift Commitments

\$2 Million

Planned Gifts Received

35 Gifts

Most Popular Giving Vehicles:

Bequests

Life Insurance Beneficiary

IRA Beneficiary

Charitable Remainder Trust

Real Estate

Recipients benefiting from planned gifts:

12 Catholic Parishes

AIC Tuition Endowment

Basilica of the National Shrine of Mary, Queen of the Universe

Catholic Charities of Central Florida

Diocese of Orlando

Diocese of Orlando for Seminarian Formation

San Pedro Spiritual Development Center

St. James Cathedral School

Legacy Planning Seminars

Providing Estate, Financial and Legacy Planning to Parishioners
throughout the Diocese:

Holy Family Catholic Church, Orlando

St. Catherine of Siena Catholic Church, Kissimmee (English & Spanish)

St. Matthew Catholic Church, Winter Haven

St. Patrick Catholic Church, Mt. Dora

Picture Your Legacy Cards

Picture Your Catholic Legacy was incorporated into our Legacy Planning seminars. It is an exercise with 50 cards of powerful images including babies, families, faith, and nature's majesty that help parishioners reflect on their legacy, envision it, and articulate it into words. The exercise helps participants envision a Catholic legacy that transitions their values and principles.



"Evening of Gratitude"

Thank You To Our
Generous Donors!

We were blessed to welcome 130 friends to the annual Evening of Gratitude with Bishop John Noonan on December 5, 2019 at the Orlando Country Club.

This recognition event celebrates the members of the Vivos Christi Legacy Society and Our Catholic Appeal Corpus Christi Society.



Statements of Financial Position

ASSETS		June 30,	
		2020	2019
Assets	Cash and cash equivalents	\$1,090,427	\$884,696
	Investments	5,889,679	6,183,085
	Investments restricted for long-term purposes	12,972,705	12,366,079
	Agency funds held	40,042,438	38,284,744
	Other assets	1,025,005	757,813
	TOTAL ASSETS	\$61,020,254	\$58,476,417
LIABILITIES AND NET ASSETS			
Liabilities	Accounts payable and accrued expenses	\$19,029	\$10,060
	Agency obligations	40,042,438	38,284,744
	Other liabilities	700,574	717,776
	Deferred revenue	84,993	150,293
	Total liabilities	\$40,847,034	\$39,162,873
Net Assets	Without donor restrictions		
	Undesignated	1,289,956	1,046,870
	Designated for donor-advised funds	178,492	—
	Total without donor restrictions	\$1,468,448	\$1,046,870
Net Assets	Without donor restrictions	18,704,772	18,266,674
	Total net assets	\$ 20,173,220	\$19,313,544
TOTAL LIABILITIES AND NET ASSETS		\$61,020,254	\$58,476,417

Audited by Batts Morrison Wales & Lee, P.A.
Audited Financial Statements are available upon request.

Statements of Activities

Public Support and Revenue and Net Assets Released from Time and Use Restrictions	For Year Ending June 30,	
	2020	2019
Development and stewardship service fees	\$2,084,239	\$2,005,094
Investment management service fees	\$240,902	\$250,257
Campaign service fees	\$191,456	\$217,090
Contributions with donor restrictions	\$1,121,316	\$841,966
Contributions without donor restrictions	\$269,383	\$23,752
Investment income, net - with donor restrictions	\$171,736	\$828,922
Investment income, net - without donor restrictions	\$6,742	\$315
Total public support and revenue and net assets	\$4,085,774	\$4,167,396
Expenses (Program Activities)		
Distributions to other diocesan and Catholic entities	834,309	554,913
Our Catholic Appeal	754,724	873,997
Major and planned giving	343,362	290,422
Parish campaigns	230,248	331,832
Offertory enhancement	167,764	100,246
Investment management	160,919	126,039
General advancement services	151,105	50,867
Education campaign	6,390	124,170
Total program activities	2,648,821	2,452,486
Supporting activities		
Management and general	577,277	597,147
Total supporting activities	577,277	597,147
Total expenses	3,226,098	3,049,633
Change in net assets without donor restrictions	\$421,578	\$102,911
Change in net assets with donor restrictions	438,098	1,014,852
CHANGE IN NET ASSETS	859,676	1,117,763
NET ASSETS - Beginning of year	19,313,544	18,195,781
NET ASSETS - END OF YEAR	\$20,173,220	\$19,313,544

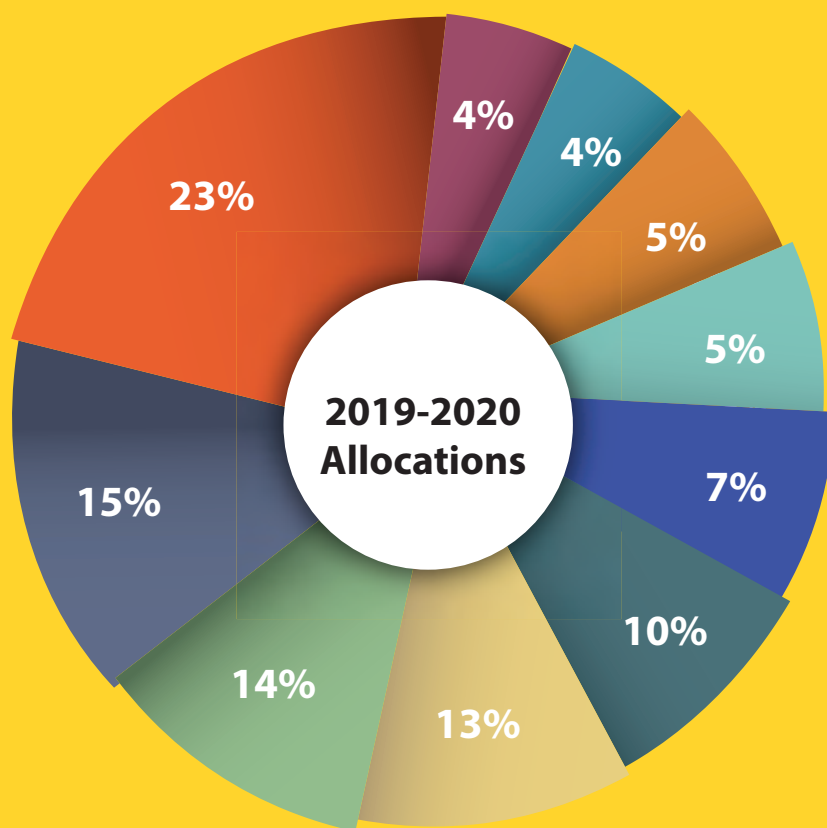
Audited by Batts Morrison Wales & Lee, P.A.
Audited Financial Statements are available upon request.



OUR CATHOLIC APPEAL

The Catholic Foundation of Central Florida

Gifts to Our Catholic Appeal (OCA) support every parish, ministry and school in the Diocese of Orlando.



2019-2020 Allocations

OCA 2019-2020 Goal: \$15 Million

\$16.1 Million Collected

39,899 Donors
\$404 Average Gift

Leadership & Parish Life – 23%

Vocations & Seminarian Education, Clergy Formation, Permanent Diaconate, Bishop's Office, Liturgy, Liturgical Music, Consecrated Life, Tribunal, Ministry to Senior Priests, Ministry to International Priests

Education – 15%

Catholic Schools, Mission Office/Sister Diocese of San Juan de la Maguana, San Pedro Spiritual Development Center

Discipleship & Stewardship – 14%

Parish, School & Diocesan Development Services

Human Dignity & Solidarity – 13%

Bishop Grady Villas, Catholic Charities of Central Florida, Farmworkers Ministry, Tourism Ministry

Laity, Family & Life – 10%

Children's Ministry, Family Ministry, Catholic Campus Ministry, Multicultural Ministry, Youth Ministry, Adult Ministry, Mission Integration

Ecclesiastical Property – 7%

Cemeteries, Design & Construction, Facilities Management

State & National Outreach – 5%

United States Conference of Catholic Bishops, Florida Conference of Catholic Bishops, Southeast Pastoral Institute

Financial Services – 5%

Finance, Information Technology, Parish Shared Accounting Services, Printing & Distribution

Communications – 4%

Archives, Communications, Florida Catholic Newspaper, Faith Fit

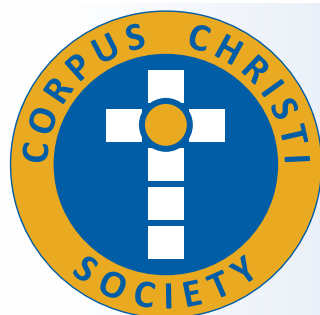
Human Resources – 4%

Parish, School & Diocesan Human Resource Services, Victim Assistance

Shepherd's Fund: 338 Donors - Over \$492,000 Given

The Shepherd's Fund is intended to provide Bishop John Noonan with a supplementary source of funds for addressing pressing needs, special projects, or extraordinary circumstances that are not covered by the diocesan budget and for which no other revenue source is available. As an unrestricted resource, The Shepherd's Fund gives the bishop the capacity to respond to emergency situations as they arise and the flexibility to embrace opportunities that might otherwise be lost.

Our Catholic Appeal Societies



Corpus Christi Society

"Body of Christ"

\$10,000+ annual gift

Anonymous (1)
 Selim and Huguette Ayoub
 Timothy and Anita Behler
 Frank and Diane Bergau
 Albert and Mary Bergeron
 Joe and Carol Bert
 Michael and Melissa Bianculli
 Kevin and Jennie Bowler
 Paul and Susan Boylan
 Eric and Cherie Brinkman
 Christopher and Maureen Brockman
 Michael and Jetnareth Broom
 Patrick and Beth Brown
 Dr. Barbara Bunster-Bornstein
 †John and Alice Burgess
 Kenneth and Mary Pat Burke
 Jim and Lisa Burrell
 Edmund and Susan Cain
 Mr. Andrew P. Caneza
 Larry and CeCe Carroll
 Tom and Peggy Chandler
 Ms. Roberta Cheever
 Patrick and O'Ann Christiansen
 Mrs. Jean A. Corr
 Peter and Deborah Costello
 Ronald and Paula Davoli
 James and Patricia Dawson
 Mr. Nicholas J. Degel
 Ms. Mary Demetree
 Dave and Lynda Dennis
 William Dingman and Debra Wert
 David and Anne Dore
 James and Deborah Doyle
 Ms. Cathy Engelman
 Michael and Fredrika Erdman
 Ernest and Tina Euler
 Orlando and Carolyn Evora
 Ms. Virginia M. Farget
 Ms. Amber Farrell
 Gavin and Annette Ford
 Edward and Karen Gallagher

†Mr. Clarence Geis
 Mrs. Shirley Geitner
 Mike and Pam Gilardi
 †David and Christeen Gray
 Leida Haddock and Robert Wright
 Andrew and Linda Hannigan
 Mrs. Helene A. Harmon
 Alfred and Mary Harms
 Mrs. Rose Haynick
 Ron and Celeste Henkelman
 Shaun and Georgette Hillary
 Miss Gretchen Hofmann
 Eric and Diane Holm
 Richard and Josephine Irumudomon
 Robert and Kathleen Jankowski
 Samuel and Constance Kaleel
 Joseph and Nan Kearn
 Allan and Linda Keen
 Mark and Cindy Keenan
 Chris and Lisa Killer
 Robert and Judy Kryger
 Chip and Ann Landon
 Ms. Cathy Lawrence
 Salvador and Jacqueline Leccese
 Douglas and Jennifer Lieb
 Brian and Janet Lower
 Mel and Kitty Martinez
 Harvey and Carol Massey
 Mr. Charles McNulty
 Carl and Maritza Mitchell
 John and Ultima Morgan
 Larry and Lisa Mullinax
 Mr. Thomas J. Myers
 James and Mary Nealy
 Dr. Michael A. Nocero, Jr.
 Francisco and Gloria Noda
 Kevin and Mary O'Donnell
 Mr. George O'Neill, Jr.
 Mark and Robin Ogier
 Gordon and Christina Olson
 Bill and Jody Orosz

Louis and Paulette Paradiso
 Mr. Richard Pesola
 Randall and Kathleen Poliner
 Tom and Selby Prince
 Terry and Jeanne Quigley
 Patrick and Louise Rainey
 Daniel and Jill Renuart
 Melvin and Terri Riecher
 Mr. Donald J. Rieth
 Steve and Susan Rosbury
 Phillip and Lina Ruhlman
 Mrs. Marilyn C. Russell
 Dwight and Isabel Saathoff
 Ms. Janice Salerno
 Joe and Penny Savona
 John and Helen Schaffer
 Lee and Mariann Schmutde
 Mrs. Marilyn Sciortino
 Richard and Dolores Shantz
 David and Mary Spacone
 Rick and Marlys Strube
 Stephen and Cindy Strube
 Steven and Jill Thagard
 Mrs. Theresa Wahl
 Robert and Mary Wells
 †Roderick and Mary Whelan
 George and Charlotte White
 Thomas Winters and Rebecca Moroosse
 Frank and Nita Witt
 Steve and Lori Zepf
 Robert and Renda Zielke
 Victor and Jaquelynn Zollo

† May God grant eternal rest to these faithful friends of the Church. They are greatly missed.

Our Catholic Appeal Societies

Spes Christi Society

"Hope of Christ"

\$5,000 to \$9,999 annual gift

144 Members

cfocf.org/Spes2020



Lumen Christi Society

"Light of Christ"

\$2,500 to \$4,999 annual gift

698 Members

cfocf.org/Lumen2020

Fidelis Society

"The Faithful"

Any size gift for
5 consecutive years

20,611 Members



Not everyone can make the same size gift, but everyone can make the same size sacrifice. All contributions from the smallest to the largest are gratefully appreciated.



The Catholic Foundation
of Central Florida
CAPITAL CAMPAIGN

Our Lady of the Lakes Catholic Church (Deltona)

\$867,138: Pledged (389 gifts)

\$800,000: Campaign Goal

"We were guided by The Catholic Foundation of Central Florida from feasibility study to capital campaign, providing us with much needed expertise in the presentation of our ideas to our parishioners. This is a professional and dedicated team that made sure we reached our goals." - Rev. Kenny Aquino, Divine Mercy Catholic Church, Merritt Island, FL (formerly of Our Lady of the Lakes Catholic Church, Deltona, FL)

Capital Campaigns at the parish and diocesan level address largescale projects that go beyond routine operating budgets. We help parishes, schools, and other Catholic entities identify critical factors for campaign success and engage the faithful in meeting essential facility and ministry needs. Though the coronavirus pandemic halted most campaign activity in our diocese this year, Our Lady of the Lakes Catholic Church in Deltona partnered with generous donors on a successful campaign that surpassed its \$800,000 goal for parish renovations, an effort led by pastor Father Kenny Aquino.





The Catholic Foundation
of Central Florida

OFFERTORY ENHANCEMENT INITIATIVE

Offertory Enhancement Initiative (OEI)

\$8.4 Million

Total increase since program
inception in 2012

\$536,991

Additional funds collected by
two parishes in total

105%

Average increase, Online Giving

2%

Average offertory increase

This year's figures affected by the pandemic.

Participating Parishes

Divine Mercy, Merritt Island

Our Lady of the Springs Catholic Church, Ocala

St. Andrew Catholic Church, Orlando

St. Charles Borromeo Catholic Church, Orlando

St. John Vianney Catholic Church, Orlando

St. Joseph of the Forest Catholic Mission,
Silver Springs

St. Mary of the Lakes Catholic Church, Eustis

St. Matthew Catholic Church, Winter Haven

St. Teresa of Avila Catholic Church, Titusville



St. Andrew
(Orlando)

International Awards

The Catholic Foundation of Central Florida earned three international awards for Catholic stewardship excellence in 2020:

Total Foundation Effort

Annual Appeal Video

Total Planned Giving (Honorable Mention)



The awards were granted by the International Catholic Stewardship Council (ICSC), an international organization committed to Christian stewardship as a way of life to strengthen local communities. This marked the third time in four years that The Catholic Foundation earned ICSC's top honor, Total Foundation Effort, and the second consecutive year winning the Annual Appeal Video award. The Catholic Foundation partners with the Diocese of Orlando's Communications team to produce the annual appeal videos.

Award Winning Videos:
bit.ly/2020AppealVideos



Donor Transparency Excellence

In 2020, The Catholic Foundation of Central Florida earned the GuideStar Platinum Seal of Transparency, which is the independent research organization's highest recognition for nonprofits. The Platinum Seal affirms that The Catholic Foundation is a proven trustworthy philanthropic organization to give to and give through.

bit.ly/PlatinumSeal

Top-Ranked Regional Philanthropy

The Orlando Business Journal newspaper ranked The Catholic Foundation of Central Florida as the 23rd largest nonprofit organization in Central Florida. The Catholic Foundation managed more than \$57 million in investments and distributed \$2 million in 2020 to support Central Florida's spiritual and corporal needs.





**The Catholic Foundation
of Central Florida**
Inspire Giving. Fund God's Work.

**May the God of endurance and encouragement
grant you to think in harmony with one another,
in keeping with Christ Jesus.**

Romans 15:5

Connect With Us!



facebook.com/catholicfoundationcf



instagram.com/catholicfoundationcentralfl



twitter.com/cf_ocf



linkedin.com/company/the-catholic-foundation-of-central-florida-inc



bit.ly/CatholicFoundationVideos



PO Box 4905
Orlando, FL 32802
407-246-4889
catholicfoundation@cfocf.org
cfocf.org