



August 2021

The Catholic Foundation of Central Florida Newsletter

Dear Friends in Christ,

Leaders come in all shapes, sizes, and backgrounds and are found in all levels of organizations and academic institutions. The saints are great examples for us as those of all ages and from different parts of the world made bold life changes and embarked on adventurous journeys in pursuit of something more. This month our Catholic school students and faculty return to school in pursuit of more knowledge and a deepening of faith. Students and faculty both are returning to a new normal even while remaining true to the Gospel and striving to follow Jesus. This month we share how community leaders are supporting the future of our Catholic Schools through endowments. We also remember those who had the vision for our Basilica of the National Shrine, Mary Queen of the Universe and we celebrate the episcopal ordination of our servant leader, Bishop John Noonan. We are excited to announce with our partner, F4 Wealth Advisors, Central Florida's first Chartered Advisor in Philanthropy Study Group. We feature another Getting to Know You team member and introduce two new Board of Directors for The Catholic Foundation. And finally, we offer prayers for our brothers and sisters in Afghanistan and tips for giving to disaster relief efforts and an opportunity to support areas impacted by disasters this year.

"Remember your leaders who spoke the word of God to you. Consider the outcome of their way of life and imitate their faith."

- <u>Hebrews 13:7</u>



### In This Month's Newsletter:

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- Getting to Know You: Carolyn Ell
- Welcome New Board Members
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# Fortifying the Future of our Catholic Schools Through Endowments



Catholic schools in Central Florida have provided a strong, Christ-centered education for tens of thousands of students. The Diocese of Orlando Office of Schools operates 40 schools in 8 counties which includes five high schools, twenty-nine elementary/middle schools, and six early childhood centers. School enrollment this year is over 13,500 students a 3.5% increase over last year. Parents and grandparents continue to choose Catholic schools and their mission to proclaim the Gospel message within an academic environment of excellence that challenges students to be creative and critical thinkers who integrate faith, moral leadership, and compassionate service in order to create a more just and humane world.

As we look to the future of education in the United States, it is imperative that Catholic schools continue to be a strong option for future generations. Supporting Catholic schools is an investment in our future and the future of our children and grandchildren. Establishing endowment funds for each school provides a steady stream of revenue and ensures long-term financial stability so each school has funding to continue providing a top-notch education in facilities that are conducive to 21st century learning for all students who want to attend, regardless of their family financial situation.

Currently, The Catholic Foundation of Central Florida manages 40 endowment funds benefiting our Catholic schools. Last year these endowments distributed \$630,000 to provide scholarships and tuition assistance, as well as dollars for programs and operations. Generous donations from donors who understand the importance of Catholic education help to strengthen existing endowments or establish a new endowment for their favorite Catholic school. Endowments can be unrestricted or restricted for scholarships, programs, facilities, etc. Many donors choose to leave a legacy by establishing a fund in honor of their family or in memory of a loved one. Donors can experience the joy of giving by setting up a fund now and building it over time and/or through an ultimate gift in their estate plans. Endowments can build through gifts of non-cash assets such as IRA rollovers, Donor Advised Fund grants, appreciated stock, real estate, or business interests.

See a list or make a gift to one of our current Endowment Funds						
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If you have a passion for Catholic education, consider a gift to strengthen a current endowment or establish an Endowment Fund for your favorite Catholic school. For more information please visit <u>www.cfocf.org/endowmentfunds</u> or contact Madelyn Weed, Vice President of Donor Services at <u>mweed@cfocf.org</u> or (407) 246-7188.

### *Now is a great time to give stock*

With current market valuations, donation stock and other non-cash assets is a *great way to increase your support for the causes which are on your heart.* By donating appreciated securities the capital gains taxes saved could allow you to provide additional support for the causes that are most important to you.

**GIFTS OF APPRECIATED SECURITIES** 

Contact your broker authorizing them to transfer X number of "XYZ Security" *in kind* to the Diocese of Orlando Fidelity Investments account: **The Diocese of Orlando DTC #0226** Acct. # X62-097373 Federal Employer Identification # 59-1215378

For any gifts made via stock or IRA, please contact Susan Hunt at (407) 246-4803 or **shunt@cfocf.org** so we can identify the incoming stock/check and ensure it is attributed to a specific parish, school or ministry or split according to your wishes.

### **Queenship of Mary**



Even though impacts from the global pandemic continue, August is a time for great rejoicing at the Basilica of the National Shrine of Mary, Queen of the Universe. We follow the example of Mary who despite her circumstances always recognized the goodness of the Lord. As we read in Luke 1:46-47,

"And Mary said: "My soul proclaims the greatness of the Lord; my spirit rejoices in God my savior."



On August 15 we celebrated with our global Church the Solemnity of the Assumption, the glorious mystery of Mary's bodily ascent to heaven at the end of her life. We also observed and celebrated the Queenship of Mary on the octave of the Assumption on August 22. Since Mary, Queen of the Universe is our patroness, this day brings our diocese much to remember and rejoice in. On this day in 1990 ground was broken on the site, in 1993 the church was dedicated, and in 2009 this church was dedicated as the Basilica of the National Shrine of Mary, Queen of the Universe. And this month marked the one-year anniversary since re-opening after being closed for months due to the global pandemic. With the dedication of the Basilica of the National Shrine of Mary, Queen of the Universe, the intention was also to honor Christ the King, to proclaim to the millions visiting this region that the Kingdom of Christ is present in Central Florida. These holy grounds have fulfilled the vision and mission through the years of being a house of pilgrimage and prayer to inspire a deeper devotion to the Mother of God and strengthen the faithful in service to the King. We rejoice too for those who have visited both physically and virtually seeking spiritual renewal through liturgy, prayer, and reconciliation. By virtue of our baptism, we share in the role of a king, serving others as Christ and our Blessed Mother serve us.



Mary is a beautiful example of what it means to truly abandon ourselves to the will of God. Despite the uncertainty of circumstances, she placed her trust faithfully in our Lord. May we daily trust in the Lord, lean on Him in times of uncertainty, and always find ways to rejoice, pray and give thanks. May God's blessings be upon you and Mary, Queen of the Universe always be your refuge and intercede for your needs.

## **Bishop's Episcopal Ordination**

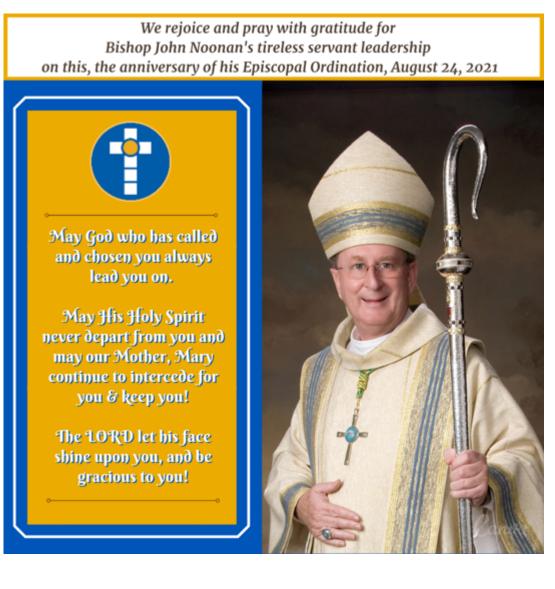
This month we celebrate the gift of apostolic succession and Bishop John Noonan to the Diocese of Orlando with the anniversary of his episcopal ordination. We are grateful he has served our diocese for 11 of his 16 years as a bishop. Bishop John Noonan sees his ministry as a priest and bishop as a mandate from God. His episcopal motto "God before me and God with me" originates in Exodus when Moses was leading the chosen people out of slavery and into the Promised Land. That same prayer was spoken by St. Patrick as he preached the Gospel in Ireland. Like Moses and St. Patrick, Bishop Noonan, fifth bishop of Orlando, is following God's call to serve His people.

Many are the responsibilities of a bishop as the chief shepherd of a geographic region. In <u>Matthew's Gospel 5:14</u>, Jesus concludes the Beatitudes by telling his disciples, "You are the light of the world. Your light must shine before others, that they may see your good deeds and glorify our heavenly Father." Bishop Noonan's diocesan priorities are a response to this call to teach and live the Light of Christ toward Goodness, Righteousness, and Truth.

- 1. Enkindling a deeper faith in the hearts and minds of our brothers and sisters
- 2. Forming leaders in Christ
- 3. Harmonizing ministries to the mission of the Catholic Church

A bishop's task is weighty and one that is impossible without the spiritual support of the flock. As a collaborative and humble leader, he has positioned our diocese well for continued growth while serving God's people. Thank you Bishop Noonan for your shining example of what it means to be a servant leader! We pray for you.

God, eternal shepherd, you tend your Church in many ways and rule us with love. You have chosen your servant, Bishop John Noonan, to be a shepherd of your flock in Central Florida. Give him a spirit of courage and right judgment, a spirit of knowledge and love. By governing with fidelity those entrusted to his care, may he build your Church as a sign of salvation for the world.



## Inspiring Collaborative Philanthropy for Central Florida

The Chartered Advisor in Philanthropy (CAP®) program at The American College of Financial Services was started by Bill and Sallie Wallace. Bill, a first-generation college student, attended Columbia University on a football

scholarship and became an All-American player. His altruism and courage led him to become a "Beach Jumper" during the Korean War. Beach Jumper missions were considered even more classified than those of Navy SEALS which were inspired by this U.S. Navy Special Forces group of officers who performed the most dangerous jobs in the Korean War.

After the war, Wallace became an insurance agent and eventually became the head of Home Life. He received almost every award the insurance industry offered. He was a pioneer in what we now call 'value-based planning'. He became one of the most admired and revered professionals in the industry. Wallace also became a leader in the philanthropic world. He recognized that financial advisors touch expanding circles of many lives, influencing people at inflection points which they make their most important decisions about life, loved ones, and legacy. He knew that if advisors were open to discussing philanthropy with their clients, they could do enormous good.

Wallace also recognized a systemic problem in the philanthropic world – nonprofits who solicited his help understood their hearts but knew nothing about their financial situation. The financial advisors who knew every detail of his financial situation were not discussing philanthropy with him. He determined the two silos, which at times could even be adversarial, should be brought together to maximize the good that can be done.

Wallace worked with The American College of Financial Services funding the CAP program in 2001 devising a sophisticated program that would teach financial advisors and nonprofit gift planners how to work together for a common purpose. The goal was to incorporate nonprofit professionals into the estate planning team and assist financial professionals with supporting their clients' philanthropic aspirations as much as they supported their accumulation of wealth. No such program had ever existed.

Over the course of eight years, 350 students earned the CAP® designation. A key factor in Wallace's plan was to find a head for the program who shared his vision of an expert in finance with a nonprofit sensibility and engage nonprofit professionals in the trusted advisors' team. In 2009 an insurance executive, Phil Cubeta, MSFS, CLU®, ChFC®, CAP® Assistant Professor of Philanthropy and Wallace Chair, joined The College with a profound commitment to uniting communities to alleviate human suffering. Today, annual enrollments in the program have tripled, and more than 2400 students have now earned their CAP® designation and are collaborating so their clients and donors can make more of an impact with their philanthropy.

Reaching this success has come to fruition through partnerships in metropolitan areas where professionals are coming together to do more for their community in CAP® Study Groups. A partnership between F4 Wealth Advisors and The Catholic Foundation of Central Florida in late 2020 has launched Central Florida's inaugural CAP® Study Group in July 2021.

Central Florida's CAP® Study Group structure mirrors the Omaha group which reports an incremental \$1.4 billion of philanthropic efforts traced to their professionals who participated in the study group. Central Florida's CAP® Study Group will provide professionals from a range of disciplines with a forum to discuss ideas, experiences and coursework focused on improving philanthropy in our Central Florida community for generations to come. Study sessions will enhance learning specifically about our region and our donors with an exchange of ideas and opportunities to meet donors and national regional speakers.

The Central Florida CAP® Study Group will include 6-8 members **growing our community network of CAP® professionals more than 20% each year.** The cohort will meet 10 times over a nine-month period with sessions lasting 90 minutes. The inaugural Central Florida CAP® Study Group has formed with coursework started and study group sessions beginning this month. Regional existing CAP®s have joined the cohort for **NightCAP®s** to develop a collaborative network of professionals supporting philanthropic aspirations of their clients and donors for greater purpose and outcome. The group's motto is "**Doing More Together For Our Community Through Philanthropy.**"

Kimberlee Riley, CAP®, President & CEO of The Catholic Foundation of Central Florida and Board of Advisor member of the Orlando Regional Chamber said,

"This is a capacity-building initiative for professional advisors and nonprofits to improve how we serve our clients and donors in Central Florida. There are many voices in different sectors in our local philanthropic ecosystem and we are investing in bringing these voices together to more effectively and collaboratively advise donors how to achieve their aspirations and increase their impact in our community through philanthropy."

#### THE INAUGURAL STUDY GROUP MEMBERS INCLUDE:

- ROB THOMSON CFP, PFS, AIF, CHIEF INVESTMENT OFFICER WITH TRIVERGENT TRUST COMPANY
- AARON BERT CFP, AIF, INVESTMENT ADVISORY REPRESENTATIVE WITH CERTIFIED FINANCIAL GROUP
- WENDY MARA, JD, FOUNDER WITH MARA LAW
- GREG MEIER, JD, PARTNER WITH SHUFFIELDLOWMAN
- JOSE SOLA, MSBI, DIRECTOR OF DIGITAL PHILANTHROPY WITH THE CATHOLIC FOUNDATION
- AMANDA LIVERMORE, VICE PRESIDENT WITH BISHOP MOORE CATHOLIC HIGH SCHOOL
- DARRELL DEVANEY CFP, FOUNDER AND PARTNER, F4 WEALTH ADVISORS

# Darrell DeVaney, CFP who launched the initiative in partnership with Riley said,

"I'm proud to help further elevate philanthropy in Central Florida. This will have a broad-reaching impact for generations. The professionals participating will finish with an elite designation with the CAP®, and therefore the donors they advise will become more educated and engaged, and the ultimate beneficiary of course will be all of the great nonprofits in Central Florida."

DeVaney has been interested in the CAP® designation which requires students to pass exams for three graduate-level courses and understands the benefits of being in a study group where related work experiences to the curriculum content can be discussed. The American College of Financial Services has established a specific cohort for the Central Florida study group coordinating logistics with the course schedules and exam windows. Riley and DeVaney have contacted 75 multi-sector professionals to invite them to future study groups. Each study group requires a mix of clientfacing advisors and nonprofit professionals. The inaugural group is a perfect mix and Riley and DeVaney have more than 50 professionals who have asked to be invited to participate in the study group in future years.

# David Odahowski, President & CEO of Edyth Bush Charitable Foundation said,

### "When professionals strive for excellence, their clients achieve better outcomes for family and community. Our community is better together with clients, donors, and professionals who are part of this group."

He has offered for Edyth Bush Charitable Foundation to sponsor the Central Florida CAP® Study Group Graduation Breakfast at their new facility 'the Edyth' in 2022.



**Top row:** Darrell DeVaney, Kimberlee Riley, Rob Thomson **Second row:** 



**From the left:** Wendy Mara, Darrell DeVaney, Kimberlee Riley, Madelyn

Wendy Mara, Aaron Bert, Greg Meier **Third row:** Amanda Livermore, Phil Cubeta, Madelyn Weed **Fourth row:** Jose Sola Weed, Jose Sola, Rob Thomson, Greg Meier, Amanda Livermore, Beth Fontes (Rollins)

### August is National Make-A-Will Month

It does not matter if you are rich or poor, if you own or rent your home or if you live to be 60 or 120 - Everyone needs a will. A will ensures your wishes (not a court decision) are followed and determines the caretaker for your pets, who should receive your property (car, furniture, family photos and mementos, etc.) and can even include instructions for funeral arrangements. A will can also save your loved ones time, money and the additional stress that comes with probate court proceedings. Your will helps you to establish your legacy and pass on your values.

If you already have a will, National Make-A-Will Month is a reminder to review your documents and make sure they are up to date. Check your beneficiary designations, include your favorite charities (including your Catholic parish and ministries) and if your will was drawn up in a state other than Florida consider having it checked by a Florida estate attorney as probate law can differ by state! Several members of our Planned Giving Advisory Council are Catholic estate attorneys and are able to assist you. A list of these professionals can be found on our website at: www.cfocf.org/advisorycouncil. If your will includes any of our diocesan parishes, schools or entities please advise us so that we can recognize you as a member of our Vivos Christi Society. This society honors you and the Catholic Legacy you are leaving to the Church. You can choose to be a named or anonymous member (your gift amount always remains confidential). Being a named member helps inspire others to also think about and create their own Catholic Legacy.

As our gift to you for National Make-A-Will Month, The Catholic Foundation of Central Florida is providing *a free copy* of our <u>Planning</u> <u>Your Catholic Legacy - A Wills Guide</u>. If you would like a printed copy or if you would like to speak with us about your Catholic Legacy, please contact Madelyn Weed, CFRE, CAP, Vice President of Donor Services, at <u>mweed@cfocf.org</u> or (407) 246-7188.

As each one has received a gift, use it to serve one another as good stewards of God's varied grace.

1 Peter 4:10

## Central Florida Catholic-compliant Community Philanthropic Events Calendar

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*For your convenience,* we have added a <u>community philanthropic events</u> <u>calendar</u> to our events webpage. This calendar shares events with philanthropists interested in supporting charities that provide services within the nine counties of the Diocese of Orlando and are in compliance with Catholic social teaching.

Central Florida Community E	vent Form	
This calendar shares events with philanthropists intere Diocese of Driands and are in compliance with Cathol		ide services within the nine counties of the
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*We invite you* to review the calendar for upcoming events and please also share our <u>Community</u> <u>Event Form</u> with your favorite parish, school, or Catholiccompliant organization so that we can add them to the online calendar.

# GETTING TO KNOW YOU



CAROLYN ELL, ChFC Senior Accountant

Hire Date: June 2019

"My favorite project has been the implementation of the new investment portal website. This new program allows our fund holders to access their fund information at any time."

# Why did you want to work at The Catholic Foundation of Central Florida?

I first learned about the Foundation while working in the Chancery for Shared Services. As a liaison for the parishes during the launch of the 2018 Our Catholic Appeal campaign, I attended several luncheons and met members of the Foundation team. I was impressed by their fellowship and focus serving the parishes of the Diocese as servant leaders.

When a position came available as a Senior Accountant, I was excited at the opportunity to be a part of this incredible team as well as being able to share my experience in accounting and finance. Part of the reason I wanted to work at the Foundation is that I loved the variety of work, including invested fund management and capital campaigns, and that I was able to continue to support the parishes. I wanted to learn different ways of supporting parishes with their longterm goals as well as meeting current needs, which would complement the work I was doing in the Shared Services area.

# How would you describe the work that you do? (What does a typical day or week look like?)

What I enjoy most about my job is how each day brings new opportunities. From processing invoices to reconciling general ledger accounts, my day is filled with tasks which support the overall mission of the Foundation. It is rewarding that the work I do benefits the parishes and ministries of the Diocese. Day to day my work supports the parishes and ministries which allows them to continue serving our community.

### What do you like most about the role that you have?

Through my job, I get to wear many hats and provide support in various ways. Every day is new and exciting and I am able to interact with great people throughout the diocese. In addition to working with the finance team, I work with members of all departments in the Foundation to serve donors. I enjoy working with the Donor Services team to help create a user-friendly and enjoyable experience for our donors and investment partners in managing their funds. Most importantly, I am most grateful to work in an office where Christ is always at the center of who we are and in everything we do.

#### What has been your favorite project so far and why?

My favorite project has been the implementation of the new investment portal website. This new program allows our fund holders to access their fund information at any time. The implementation was starting when I began at the Foundation and allowed me to quickly learn about the different funds we manage and how they support our investment partners. Through the implementation, I was able to design a guide to help donors learn more about the system and its features. This also allows me to continue to support the business managers I met when I first started at the Diocese in Shared Services.

# What do you enjoy most about The Catholic Foundation's culture?

There are many departments, but we always work together to support the other team's efforts. We have a culture of trust and respect which brings a sense of professionalism and confidence allowing us to accomplish many amazing things. We are a part of something very special and the work we do everyday has profound impacts on the lives of those in Central Florida. We all know it is a team effort and by helping each other out, we are able to accomplish a very important mission for the Diocese.





Teamwork: The collaborative effort to achieve a common goal. The ideal team includes members who are unique but complementary to each other while rallying around the team's shared purpose.

# What advice do you have for people considering working at The Catholic Foundation?

The Catholic Foundation has a wonderful environment. We have a great team where everyone is available to help in any way they can and we live our faith every day so we can bring our best efforts in support of the parishes, schools, and ministries we serve. The heart of our mission is to serve the community, and that ideal is present in all we do.

# Which of The Catholic Foundation's organizational values connect best with you?

Servant Leadership

What three words best describe The Catholic Foundation? Family, passion, commitment

# How do you hope your charitable giving impacts lives in our community?

I hope my charitable giving impacts the marginalized and needy of the community. Charity is an outpouring of love which helps those seeking our assistance. The Diocese affects many lives every day. From hundreds of families being fed, to providing the sacraments, we impact our community. It is through our charity that we are able to

reach out to those we encounter by showing them God's mercy no matter who they are or what background they come from.

What's a fun fact most people don't know about you? I learned to ski on the Alps in Italy.

### Please join us in welcoming new members of our Board of Directors!



### **Dr. Erika Wikstrom**

*St. Margaret Mary Catholic Church, Winter Park* 

Dr. Erika Wikstrom is an innovative Education Leader bringing 15 years of experience providing quality, creative instruction to elementary, middle school, high school, and college students as well as faculty to our board and organization. She is an expert at understanding pedagogy and student development which she uses to her advantage in creating curriculum and instructional designs tailored to the broad range of students' abilities, including gifted and special needs children.

#### Jessica Bracero

*St. Catherine of Sienna Catholic Church, Kissimmee* 

Jessica brings Finance and Business experience to our board and organization in addition to oversight of both residential and commercial construction projects. Her family is in its 10th year of homeschooling their daughters and preparing them for college. She shares that their main objective is to raise their daughters firmly in the faith.



### **Prayers for Afghanistan**

We are grateful for those who have sacrificed for the future of Afghanistan. We grieve for our brothers and sisters in the country and those exiled. We pray they will find strength, comfort, and hope in the Lord. We also pray for peace, dignity, and freedom.

All the ends of the earth will remember and turn to the LORD; All the families of nations will bow low before him. For kingship belongs to the LORD, the ruler over the nations.

Psalms 22:28-29

### Natural Disaster Giving Tips

#### **Give Immediately**

Disaster giving provides quick resources for those in need as soon as possible. If you have a Donor Advised Fund with an available balance, these are wonderful charitable tools to utilize for disaster giving.

#### **Give Later**

Long after the media coverage of a disaster dies down the need for support continues. After immediate needs are met, it takes time and continued funding to recovery. Recovery efforts are often slow or delayed due to the lack of resources.

#### **Give Securely**

Be sure to give to organizations you know and have a track record of being able to get funds into areas impacted by a disaster. Catholic Charities and Catholic Relief Services are secure organizations with expertise in disaster relief.

#### **Give Intentionally**

While you may not be prepared for the current disaster consider establishing a goal each year for disaster relief giving. Many types of natural disasters are cyclical and allow you to plan to give during a particular season such as hurricane season.

### 2021 Disasters Relief Collection



The funds collected in this special appeal will become part of the Bishop's Emergency Disaster Fund and will be used to support the response efforts of Catholic Charities USA and/or Catholic Relief Services to immediate emergency needs for such necessities as water, food, shelter, medical care, and aid in long-term rebuilding and recovery efforts.

Please prayerfully consider making a contribution on our secure site www.cfocf.org/disasterrelief2021



Your generous donation to the <u>2021 Disasters Relief Collection</u> will provide relief for the immediate and long-term needs of our brothers and sisters in Christ affected by natural and other disasters such as those in Haiti devastated by the earthquake and those in Louisiana devastated by Hurricane Ida.

I Want to Give to the 2021 Disasters Relief Collection

**About The Catholic Foundation of Central Florida** 

**Our Mission:** 

To inspire and increase giving, to prudently invest the resources entrusted to us, and to capably steward those charitable gifts to support the spiritual and corporal needs of the community of the Diocese of Orlando.



### Stay Connected With Us Everyday!



The Catholic Foundation is an independent 501(c)(3) nonprofit foundation committed to fostering and stewarding philanthropy to address community issues and meet the spiritual and corporal needs of our community yearround. As a proven trustworthy philanthropic organization to give to and give through, we have received the Guidestar Platinum Seal of Transparency. Fully endorsed by the Diocese of Orlando and its Bishop, we work extensively with Catholic parishes, schools and nonprofit organizations aligned with Catholic social values to help inspire giving and secure resources needed to further their long-term goals.



<u>Unsubscribe</u> <u>The Catholic Foundation of Central Florida</u> www.cfocf.org