



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

Walking Together on Our **Philanthropic Journey**

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



**20
21**

2021
MPAC
REPORT

Faith Based Investment Management
Engaging Donor Experiences
Community Leadership and Impact

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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



The Year of our Lord, 2022

One does not
live on bread
alone,
but on every
word that
comes forth
from the mouth
of God.

(Matthew 4:4)

My Sisters and Brothers in Christ:

Grace and Peace of our Lord Jesus Christ be with you. St. Matthew reminds us of the essence of our faith as we hear Jesus proclaim that the physicality of nutrition is not the same as the spirituality we receive from the Eucharist. Both are necessary to our well-being, and one cannot be substituted for the other.

The ministry of The Catholic Foundation of Central Florida is Eucharistic by its good deeds through, with and in God. You, as participants within the ministry of this life-giving organization, offer your self-sacrifice to our triune God as you are nourished by His body. As one family, the Word of God flourishes as you uplift God's holy people from the core of your being -- with all your heart, mind, and strength. The Kingdom of God binds us on earth by your goodness.

The pages of this Impact Report are filled with testimony born out of the Eucharistic feast and I encourage you to prayerfully reflect upon the many ways in which we praise God. Know how much I cherish your faithfulness and my gratitude for each one of you as you serve each other.

May our every word proclaim God.

Sincerely yours in Christ,

Most Reverend John Noonan
Bishop of Orlando





The Catholic Foundation

of Central Florida

Inspire Giving. Fund God's Work.

From The President & Chairman

Do all to the
glory of God.

(1 Corinthians 10:31)

We are grateful for our board, team, partners, and donors and look forward to another year of serving our diocese and addressing the spiritual and corporal needs of our community. We celebrate our collective generosity – from the small acts of kindness we extend to one another to the larger acts of philanthropy that make a difference in the lives of our neighbors. Together we are building the Kingdom of God in Central Florida.

As the pandemic continues, we keep all those affected in our prayers. We have learned to trust God more and turn our focus to Christ who continues to bring us hope even during our challenging times. We were reminded during the Christmas season how our Blessed Mother serves as a model in staying focused on what is important. In Luke 2:19 we read, **"All who heard it were amazed by what had been told them by the shepherds. And Mary kept all these things, reflecting on them in her heart."**

In the past year The Catholic Foundation team has been amazed too with all that has happened but also honored to respond in service to our donors, pastors, parish, school staff, chancery partners through our investment management services, community services and donor services. Through your generosity and our pastors' efforts we have been able to achieve Our Catholic Appeal goal ensuring diocesan ministries and services that support those in need as well as every parish, school and ministry throughout the diocese. We were also able to distribute \$2 million from our endowments once again supporting Catholic education, priest care, seminarian formation, social services throughout nine counties and those parishes, ministries and schools with their own endowments. We established a new fund to support Catholic Campus Ministries to honor Bishop Stephen Parkes who served several parishes, our organization as well God's people in our diocese for years. We also provided professional development grants for parishes and schools enhancing their engagement with their donors.

Most notably we have worked on developing our board of directors. For the first time since our inception, we welcomed board members representing every deanery in the Diocese of Orlando. We have engaged our board members in a new orientation program which provides a holistic overview of the needs of our community and how our services address these needs. We will continue to develop and diversify the board as this has helped us to improve our services throughout the diocese.

A new year presents us with the opportunity to revisit our enthusiasm for pursuing our ambitions and dreams. Recalling Mary's faith and the hope that her Son brings, our board and team are looking beyond the current times and focusing on the eternal perspective of our vision, to be your philanthropic organization which funds God's work, promotes the Gospel and builds the Kingdom of God here in Central Florida. We look forward to walking with you on your philanthropic journey this year.

Sincerely,

Kimberlee Riley, CAP®
President and CEO

Tom Chandler
Chairman



Board

Our board of directors, comprised of faithful Catholics including laity, religious and clergy who are leaders in our diocese. Our volunteer board works collaboratively consistent with the Holy Father's call for us "to carry out a mission invaluable for the transmission and growth of our faith".



Front Row: Dr. Erika Wikstrom, Sr Maria Teresa Acosta, Elisha González, Lori Tolland, John R. Kancilia, Randall Scott
Second Row: Bishop John Noonan, Kevin F. Bowler, Richard Strube, J. Thomas Chandler, Very Reverend Ivan Olmo, Monsignor Richard Walsh (Member)
Third Row: Karen Monteleone, Orlando L. Evora, Robert Kryger
Not Pictured: Very Rev. John C. Giel, Very Rev. Richard Trout, David R. Ramos, Jessica Bracero

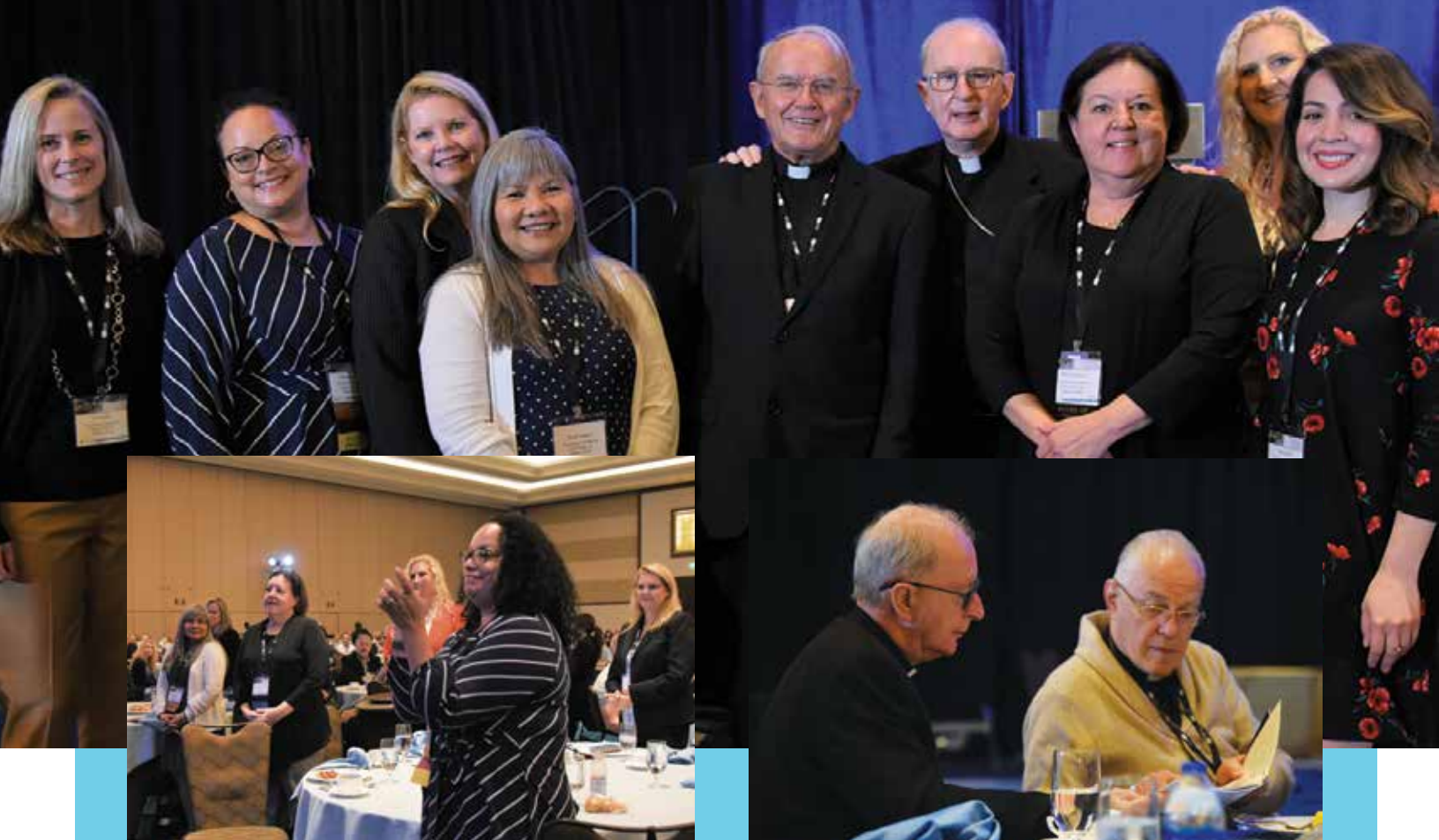


Team

Our dedicated staff are servant leaders in our initiatives to meet our community needs. Also consistent with the Holy Father's direction for who to look for in service to our Church, our staff are "active participants in the life of the Christian community".

Bottom front row: Madelyn Weed, Susan Diaz, Kimberlee Riley, Marcos Robles, Diana Loayza Garcia **Second row:** Dana Swanson, Carolyn Ell, Doris Quiñones
Third row: Alexa Pansegrau, Marta Sweeney, Stephanie Patel **Fourth row:** Karina Garcia Vazquez, Jose R. Sola **Fifth row:** Susan Hunt, Rosie Camous
Not Pictured: Shana Coulthurst, Crystal St. Julien, Ralph Gerena, Teresa Herrán, Janet Caramello, Ingrid Gualteros.

Recognized for Excellence



The Catholic Foundation Receives International Award

The Catholic Foundation was recognized with three awards this year at the International Catholic Stewardship Council (ICSC) conference. The ICSC recognize dioceses and foundations making the most impact annually engaging the faithful in inspired charity with giving vehicles and strategies that help them achieve their philanthropic aspirations, return their gifts to God and support the future of our Church.



The Catholic Foundation of Central Florida was selected to receive the following category awards:

Excellence Award
Total Foundation Effort
Excellence Award
Total Planned Giving
Honorable Mention
Total Annual Appeal

Father Patrick Sheedy was also recognized as the 2021 recipient of the **Christian Stewardship Award**. Fr. Sheedy has served as pastor of Blessed Trinity Parish in Ocala since 1988. Ministry to the poor, the elderly, the imprisoned and refugees has been a hallmark of Fr. Sheedy's priestly life. He established the La Guadalupana Mission medical and dental clinic and played an instrumental role in the founding and building of Trinity Catholic High School. He also travels to Uganda every year, where he has helped build more than 30 Catholic churches and 17 schools.

Catholic Philanthropy Awarded at National Philanthropy Day Celebration

The Association of Fundraising Professionals (AFP) Central Florida Chapter hosts National Philanthropy Day to honor individuals, corporations, foundations, and nonprofit organizations in Central Florida whose efforts change the face of our community. More than 400 community leaders gathered on November 19, 2021, to celebrate the impact positive philanthropy has on our Central Florida region. The Catholic Foundation nominated honorees included Bishop Grady Villas, Catholic Charities of Central Florida, former team member's daughter, Raquel Caramello, and was blessed to also be selected as an honoree this year. The broad community gained awareness about the many ways our Catholic Church supports our community – we educate, we house, we clothe, we feed, we provide medical, behavioral healthcare, and more. We don't only serve Catholics – we serve all because we are Catholic.



First Row: Raquel Caramello, Marta Sweeney, Susan Hunt, Maureen Kane
Second Row: Bishop John Noonan, Janet Caramello, Madelyn Weed, Kimberlee Riley, Tom Chandler, Kevin Johnson

National Philanthropy Day Celebration Awardee & Honorees

David R. Roberts Youth in Philanthropy Award

Raquel Caramello

Student Creating Change Honoree

Bishop Grady Villas

Corporate & Foundation Engagement Honoree

The Catholic Foundation of Central Florida

Community Impact Honoree

Catholic Charities of Central Florida

CAP® Designation



Madelyn Weed, Vice President and Chief Donor Services Officer, has earned the Chartered Advisor in Philanthropy® (CAP®) professional designation from the Richard D. Irwin Graduate School of The American College of Financial Services. Candidates for the CAP® designation must complete a minimum of three courses in philanthropic studies and six hours of rigorous, supervised

written examinations. The curriculum addresses the advanced design, implementation and management of charitable gift techniques and strategies, as well as philanthropic tools that include charitable trusts, private foundations, supporting organizations, donor advised funds, pooled income funds and charitable gift annuities. An elite 2,500 individuals have been awarded the CAP® designation since its inception in 2003.

Fundraising & Development Certificate

Diana Loayza, Legacy Gifts & Grants Manager and Doris Quiñones, Stewardship Director, each earned their Certificate in Fundraising & Development after completing 60+ hours of coursework at the Edyth Bush Institute for Philanthropy & Nonprofit Leadership at Rollins College. The Certificate in Fundraising and Development helps professionals advance in the field, achieve career goals, and prepare for leadership roles in nonprofit fundraising/development departments. The program offers training in fundraising fundamentals, special gifts, capital campaigns and planned giving.



Distinctive Faith Based Investing

\$87.7 Million Assets Under Management

as of June 30, 2021



Total Assets Under Management

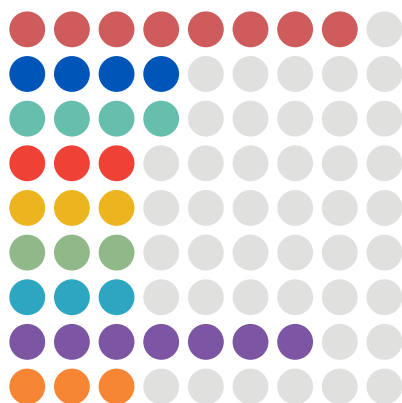
130	Endowment Funds	\$67,413,004
27	Reserve Funds	\$19,194,265
6	Donor Advised Funds	\$307,206
17	Charitable Gift Annuity Funds	\$775,295

Areas of Interest Supported (Market Value)

Interest	Funds	Value
Catholic College & University	3	1,955,410
Catholic Education	46	32,620,048
Church Leadership & Development	7	4,432,155
Clerical Life	5	11,658,007
Outreach Ministries	9	8,900,049
Parish Life	83	27,015,330
Donor Advised Fund	6	307,206



Total Distributions \$1.9 Million (All Funds)



Scholarship/Tuition Assistance	\$702,118
Ministry Support	163,432
Charities	169,975
CCM	69,060
Polk County Charity	45,794
Bishop Grady Villas	12,000
Priest Retirement	77,470
Parish Support	585,596
Foundation Support	85,464

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.

Permanently Endowed Fund Investment

\$67.4 Million in 130 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 in accordance with donor intent range — 3-5% of market value, corpus preserved.

Reserve Fund Investment

\$19.1 Million in 27 Funds

- Funds are not permanently restricted.
- Funds distributed as requested and in accordance with donor/parish intent.
- Corpus can be preserved by parish or donor 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.



Distinctive 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

99.3%

Compliance Rate

While some mutual funds may have exposure to investments which are not in compliance with USCCB guidelines, the potential exposure is only 0.6% 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

Endowment Funds

as of June 30, 2021

Catholic College and University: Total \$2.0 Million

Bishop Stephen D. Parkes Endowment for Catholic
Campus Ministry*
Catholic Campus Ministry Endowment Fund
Catholic Campus Ministry Endowment Fund (AIC)

Catholic Education: Total \$25.3 Million

Adelaide Valdes Endowment Fund
AIC Tuition Assistance
Joe Cadden Memorial Scholarship Endowment Fund
Deforest W. and Margaret Y. Bullard Scholarship Fund
Fr. Frank Zammit Endowment Fund
Fr. Joseph Nolan Education Endowment Fund
Holy Redeemer Catholic School Endowment Fund
Our Lady of Hope Catholic Education Endowment Fund
Our Lady of Lourdes (Melbourne) School Endowment Fund
Raymond H. Giel Endowment Fund for St. Paul School*
Resurrection Catholic School Endowment Fund
Richard L. & Rita C. Lienenbrink Scholarship Endowment
St. Timothy Catholic Church Educational Endowment Fund
The Annunciation Catholic Academy Endowment and
Charitable Trust*
The St. Teresa Catholic School Endowment Fund
Tuition Assistance Scholarship Endowment Fund

Bishop Moore

Andrew P. Caneza Foundation Endowment Fund
Ann Hefferin Memorial Endowment Fund
Dave Powers Memorial Endowment Fund
Dawn Michelle Aberwald Memorial Endowment Fund
Robert J. Peterson Memorial Endowment Fund
Gary Burkey Student-Athlete Endowment Fund
Guardian Angel Endowment Fund
Joanne C. Brown Endowment Fund*
Joe Skinner Endowment Fund
Kelly Reen Memorial Fund

* New funds in fiscal 2021

Bishop Moore and Morning Star

The Michael Scheve Endowment 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

Santa Fe Catholic High School

Santa Fe Catholic High School Endowment Fund*
Xavier Leyva Quintana 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 \$ 4.4 Million

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

Clerical Life: Total \$11.1 Million

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



Outreach Ministries: Total \$7.2 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 \$17.4 Million

Albert J. and Christine M. Hackl Endowment Fund for the benefit of Holy Spirit Church (Lake Wales)
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 Sacrament Catholic Church, Cocoa 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
Endowment Fund of the Basilica of Mary Queen of the Universe Shrine
Fred Enck Justice Ministry Endowment Fund
Holy Family Catholic Church Endowment Fund
Holy Name of Jesus Catholic Church 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
Kathryn M. Goggin Endowment for Marian Devotion*
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 Lakeland 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, Debarry 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. Isaac Jogues Catholic Church Endowment Fund*
St. James Cathedral Endowment Fund
St. John Neumann Catholic Church Endowment Fund
St. John the Evangelist 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. Jude, Catholic Community 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 Catholic Foundation Announces Three New Endowment Funding Options

Equity Building Endowment

The donor establishes a fund over a number of years, not to exceed 10 years.*

Example for
5 Years:



Virtual Endowment

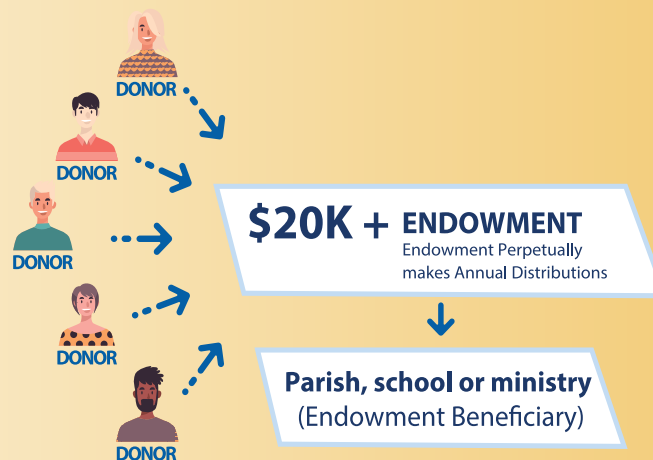
The donor establishes a fund with an initial gift now and the remainder coming through a bequest.*



Pooled Endowment

Two or more donors join together to establish a fund with a singular charitable purpose.

Perfect for family members, group of friends, colleagues or classmates!



SCAN HERE
to learn more



*The donor agrees to make annual donations for the charity, equal to the amount of the eventual endowment distributions, until the endowment is fully funded.

New Endowment Funds



Bishop Stephen D. Parkes Endowment for Catholic Campus Ministry

In celebration of the appointment of Bishop Stephen D. Parkes as the fifteenth Bishop of Savannah and in thanksgiving for his years of dedicated service to God's people in the Diocese of Orlando, both the founding and the current board of directors of The Catholic Foundation of Central Florida invited donors to join together for the establishment of the **Bishop Stephen D. Parkes Endowment for Catholic Campus Ministry Fund**.

Bishop Stephen Parkes served as a founding board member and the first Spiritual Director of The Catholic Foundation of Central Florida from 2009-2019. Bishop Parkes selected Catholic Campus Ministries. We continue to be deeply grateful for his years of dedicated service.

Emmaus Endowment Fund

Through the generosity of many, our retired priests will be blessed with the sanctuary of a peaceful home at Emmaus, an independent living community on the holy grounds of the San Pedro Spiritual Development Center in Winter Park.

To properly care for this new residential community, the Emmaus Endowment Fund was created to provide for ongoing maintenance of the facilities, a source to support priests who are unable to afford the full monthly rental costs and a comprehensive care management program for its residents.

A sub-fund, the St. Anthony of Padua Fund, was created by David and Lynda Dennis to benefit retired priests of the Diocese of Orlando who otherwise lack the resources to pay for the use of the Emmaus independent living community and can be used to provide supplemental residential support to other retired priests of the Diocese of Orlando as recommended by the Bishop.



Reserve Funds as of June 30, 2021

Catholic Education: Total \$7.3 Million

Bishop Moore Catholic High School 3-5 Year Reserve Fund
Joint Investment Fund of John Kevin Doyle and Coto Family Fund (Bishop Moore)
Father Joseph Nolan Education Reserve Fund*
Fr. Paul Kamide Fund for the Epiphany Help Center
Perrault Family Fund
Trinity Catholic High School 3-5 Year Reserve Fund*

Parish Life: Total \$9.6 Million

Blessed Trinity, Ocala 3-5 Year Reserve Fund
Charles "Chuck" Murray & Elizabeth "Betty" Murray Fund
for Centro Guadalupano
Church of Our Saviour Quasi-Endowment Fund
Resurrection Catholic Church, Lakeland Quasi Endowment Fund
St. Margaret Mary Catholic Church 5+ Year Capital Reserve 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
The St. Stephen Catholic Community 3-5 Year Reserve Fund*
The St. Stephen Catholic Community 5+ Year Reserve Fund*

Church Leadership and Development: Total \$553,000

CFOCF 3-5 Year Cash Reserve Fund*
CFOCF 5+ Year Cash Reserve Fund*
Deacons 5+ Year Reserve Fund

Clerical Life: Total \$69,000

Seminarians - Dorsey (INT POOL)
Seminarians - Other Quasi-Endowment

Outreach Ministries: Total \$1.7 Million

Bishop Grady Villas Temporarily Restricted Fund
Blessed Trinity Ocala Reserve Fund for Brother's
Keeper Ministry*
The Affordable Housing Fund
The Shepherd's Fund (INT POOL)



*New funds in fiscal 2021

Deacons 5+ Year Reserve Fund

The Office of the Permanent Diaconate is committed to serving the diverse needs of the Diocese of Orlando in the local parishes and surrounding communities. In recognition of the growing need for the formation, ministry and life of the permanent deacons within the Diocese of Orlando, the Office of the Permanent Diaconate has established the Diaconate Reserve Fund. The fund's purpose is to provide partial scholarships for deacon aspirants or candidates who cannot meet the financial obligations of their initial formation; providing partial scholarships for deacons or the wife of a deacon enrolling in certifying courses as Spiritual Directors, Chaplains, Tribunal Advocates, or other specialized certifications; and supporting other formative programs initiated by the Office of the Permanent Diaconate that benefit the corporal and spiritual needs of the Diocese.

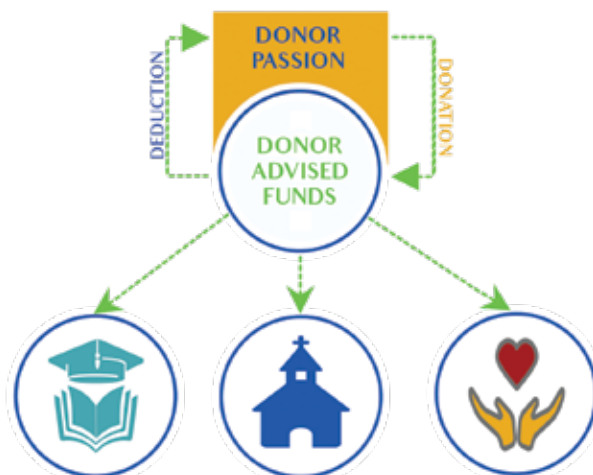


Donor Advised Funds as of June 30, 2021

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.

\$196,603 Invested

DAF Grant Distributions	\$74,150
Total # of Grants	47
Organizations supported	23
Donor Advised Fund	\$307,206
DAF Payout Rate	41.5%



Active Donor Advised Funds

NEW Mel and Kitty Martinez Family Donor Advised Fund

The Father Walsh Donor Advised Fund

NEW The St. Philip Phan Van Minh, Orlando Donor Advised Fund

The Kevin Bowler Donor Advised Fund

Planned Giving Donor Advised Funds *These will be funded through a bequest.

NEW The Fasano Family Donor Advised Fund*

The Vogelpohl Family Endowed Donor Advised Fund*

Nonprofits Supported by DAF Grants

www.cfocf.org/daf



Grants Lift Philanthropic Efforts throughout the Diocese

Marian Contest

The 2021 Marian Contest: “Mary & Joseph – The Model Parents & Disciples” was a beautiful expression of devotion to the Holy Family and the powerful example they set for us today. Middle-school students who entered the Marian Contest had the opportunity to earn scholarship awards from \$50 to \$1,000 for continued faith formation by expressing their love for Mary, Our Blessed Mother, and her most chaste spouse, St. Joseph.

The annual contest, administered through an Endowment Fund at The Catholic Foundation of Central Florida in partnership with The Diocese of Orlando’s Office of Schools, and Office of Laity, Family and Life, was open to 5th-8th grade students enrolled in a diocesan Catholic School, Parish Faith Formation or Youth Ministry Program.

This year’s contest was overwhelmingly faith-filled. Thanks to the support of teachers and catechists, we received 137 entries from 16 schools and parish faith-formation programs. Middle school students tapped into their Catholic faith to express their reverence for Mary and Joseph through written essays, PowerPoint presentations, and videos. Student contest entries combined Catholic scripture, history, reflection and personal testimony. This year’s submissions were outstanding and after review, the following 1st, 2nd and 3rd place entries were selected along with five Honorable Mentions:

Grant Awardees

1st Place: Samantha Lorey, St. Mary Magdalen Catholic School – Essay (\$1,000 scholarship)

2nd Place: Kaelyn Johnson, St. Charles Borromeo Catholic School – Essay (\$100 scholarship)

3rd Place: Aileen de la Rosa: St. John Vianney Parish – Video (\$50 scholarship award)

Honorable Mentions:

- Lila Allender, St. Mary Magdalen Catholic School - PowerPoint
- Lucky Boren, St. Brendan Catholic School - Essay
- Santino Cevallos, St. Brendan Catholic School - Essay
- Andres Gomez, Ascension Catholic School - Essay
- Alexa Johnson, St. Charles Borromeo Catholic School - Essay



Growing Your Stewardship Parish Goals

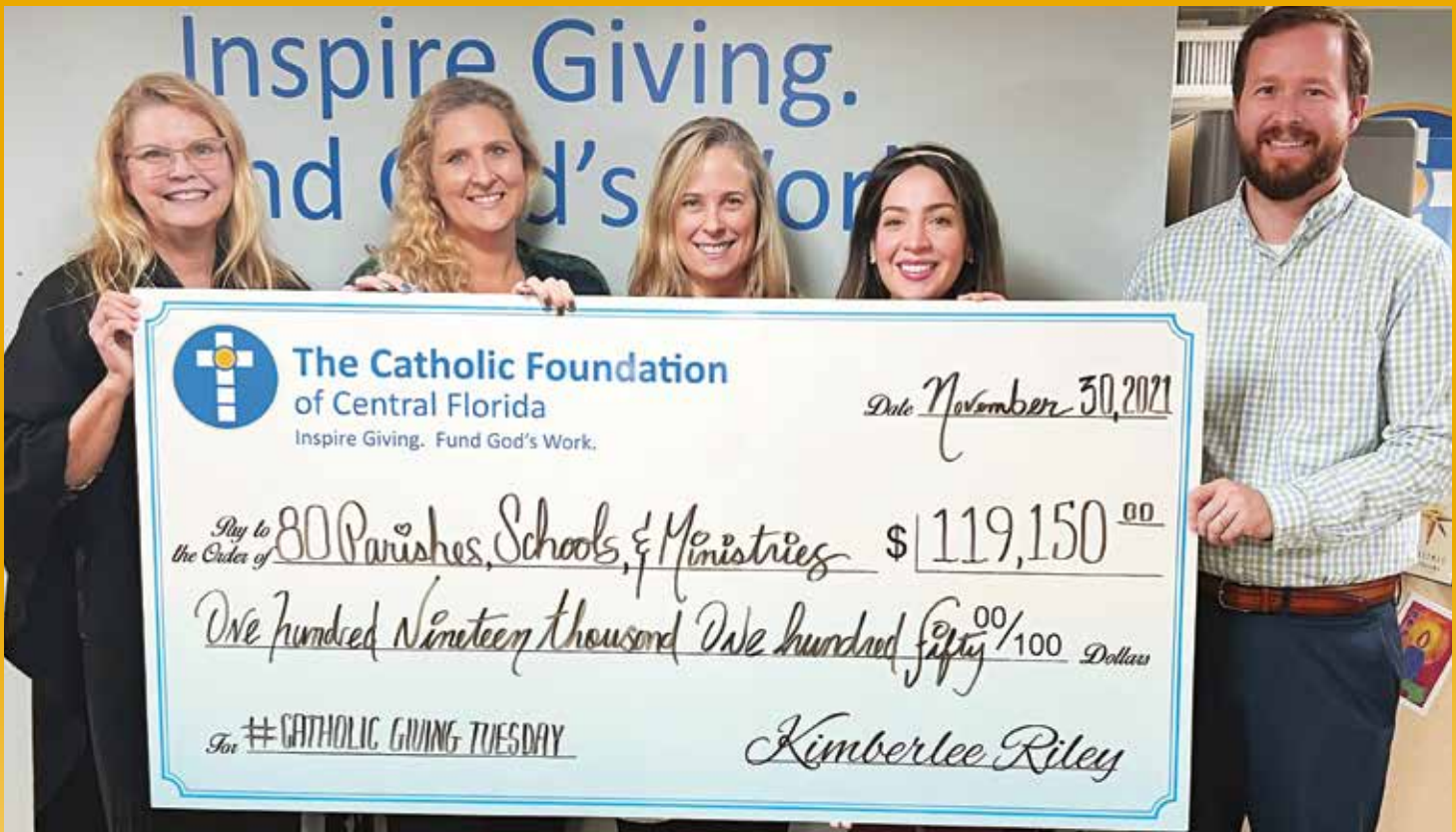
The Catholic Foundation of Central Florida awarded 10 scholarship grants to pastors and parish staff/leaders to attend the International Catholic Stewardship Council (ICSC) Conference in Orlando. The goal of this grant was to support the professional development of all those involved with advancing the stewardship of their parish in the Diocese of Orlando.

Grant Awardees: Andrew LaFaro, Easter Byrne, Richard Peterson, Deacon Stephen Floyd, Rev. Derek Saldanha, Rev. Thomas Connery, Gregory Stevens, Rev. Stephen Ogonwa, Susan Lanier, Tracy Conroy, David Vogelpohl

The 59th annual ICSC conference held in September 2021 — themed “**Restore Our Joy**” — offered attendees networking opportunities and more than 100 stewardship-related sessions focusing on new ideas, innovations, strategies on coming back from the pandemic as together we bring our church throughout the world to its fullness of charity.

Catholic Giving Tuesday Grants

The Catholic Foundation sponsored #CatholicGivingTuesday Grants totaling \$3,250 were available to diocesan entities who partnered with The Catholic Foundation to bring awareness to the joy of philanthropy and the collective impact of charitable giving on our community. On #CatholicGivingTuesday, donors were encouraged to follow their Catholic hearts and share their gifts with the ministries in our diocese for which they are grateful. This annual day of giving, held on November 30th, was a great success with 400 donors throughout the diocese supporting 80 parishes, schools and ministries with a record-breaking \$119,000!



Grant Awardees Included: Bishop Grady Villas/Magnify, Catholic Charities of Central Florida, Holy Redeemer Catholic School, Lourdes Academy with St. Mary Magdalen Church receiving an Honorable Mention.



St. Katharine Drexel

The Catholic Foundation of Central Florida established the St. Katharine Drexel Society which recognizes the generosity of donors whose annual financial support for the ministry of The Catholic Foundation helps 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 *(July 1, 2020 – June 30, 2021)*

Anonymous (6)
Sister Maria Teresa Acosta, SCTJM
Ralph and Mayta Ascencio
Felix and Magali Ayala
Kevin and Jennifer Bowler
Philip Brady
James and Janet Caramello
Martin and Elaine Cardwell
Tom and Peggy Chandler
Paul Corbley
Paul Crumley
Stephen and Tina Davis
Elba Deleon
David and Carolyn Ell
Orlando and Carolyn Evora
Michael Findley
Nadine Garcia
George Garcia
Rafael and Betsy Gerena
Very Reverend John Giel

Anthony Guarino
Jeff and Nancy Harris
Susan Hunt
John Kancilia
Allan and Linda Keen
Robert and Judy Kryger
Jose and Mary Lebron
Jorge and Luz Londono
Randy Means and Carol Brinati
Sue Medley
Shirley Merritt
Victoria and Michael Milford
Anthony and Karen Monteleone
Mark Nothnagle
Rita O'Donnell
Very Reverend Ivan Olmo
Stephanie Patel
Jose and Doris Quiñones
Robert Rainey
Timothy and Kimberlee Riley

Marco and Michelle Robles
Hector and Gloria Sanchez
Noel and Yara Sandoval
Larry and Tricia Scheve
Randall and Christine Scott
Thomas and Kristin Simmers
Crystal St. Julien
Dana Swanson
Timothy and Lori Tolland
Very Reverend Richard Trout
Rafael and Myrta Villalobos
Glenn and Esie Ward
Andrew and Madelyn Weed
Steve and Lori Zepf
Strube Family Foundation
Knights of Columbus Council #6125

Together



Prayer to Bring the World
to its Fullness of Charity

Heavenly Father,
You are the giver of life and
Everything we have is a gift from you.
You have shown us your infinite
Generosity by giving us Your Son,
Jesus Christ.

You inspired St. Katharine Drexel
To dedicate her life and selflessly share
Her treasures with those in need.

May her example help us to be faithful
Stewards of your abundant gifts.
Teach us to be cheerful and grateful
Givers, so we can bring our Church
Spread throughout the world
To its fullness of charity.

We ask this through Jesus Christ our Lord.
Amen.

www.cfocf.org



“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

St. Katharine Drexel: American Foundress, Religious, Heiress, and Philanthropist

Excerpt from an article by: Sister Maria Teresa Acosta, SCTJM

The second American-born saint to be canonized in the Catholic Church was also born into one of the most elite, yet charitable and philanthropic, families in the United States in the mid-1800's. Born in Philadelphia on November 26, 1858, St. Katharine was the second child of investment banker Francis Anthony Drexel and Hannah Langstroth. When Hannah died five weeks after her birth, she and her sister were cared for by her aunt and uncle, Ellen and Anthony Drexel, founder of Drexel University. When Francis re-married Emma Bouvier in 1860, he brought his two daughter's home. A third daughter, Louisa, was born in 1863.

Katharine and her sisters grew up in a truly Christ-centered home. They witnessed the example of the spiritual and corporal works of mercy lived directly by their devout Catholic parents, who three times a week, opened their home to distribute food, clothing, and medication to those in need. They understood well that the gifts given by God on this earth are not ours but are for the glory of God and the common good of all. Both parents were devoted to the Eucharist and the Blessed Mother; daily prayer was an indispensable part of their lives.

On a special trip to Europe in January 1887, Katharine and her sister were received in a private audience by Pope Leo XIII. They asked him for missionaries to staff some Indian missions that they had been financing. The Pope suggested that Katharine become a missionary herself. After consulting her spiritual director, she decided to give herself to God, along with her inheritance, through service to Native and African Americans, founding the Sisters of the Blessed Sacrament to carry out this mission.

Mother Katharine exemplified the life and virtues of a Sister of the Blessed Sacrament. Even while controlling and dispersing her personal wealth, she remained so personally detached from it that she wrote with pencils until they were 2-inch stubs (a pile of which are on display at her Shrine), and personally mended and patched her own shoes until there was little left of the originals. The mission students who observed her visits could not believe that Mother Katharine was the legendary “rich nun,” because she would share in “all the dirtiest jobs.”

Jesus in the Blessed Sacrament was everything to her. She frequently reminded her sisters that their love for the Native and African American children they served must emanate from their love of the “Divine Prisoner of the Tabernacle.”

Mother Katharine died at the age of 96. St. John Paul II raised her to the altars on October 1, 2000.

“ALL IS VANITY EXCEPT KNOWING,
LOVING AND SERVING GOD. THIS ALONE
CAN BRING PEACE TO MY SOUL.”

ST. KATHARINE DREXEL, PRAY FOR US!



Sister Maria Teresa Acosta

The Philanthropic Journey



"For where two or three are gathered together in my name, there am I in the midst of them."
Matthew 18:20

Doing God's Work Together

Albert 'Jim' and Christine Hackl's lives of generosity exemplify what Matthew shared in his gospel. Their strong Catholic faith played a role in establishing endowments supporting Holy Spirit Catholic Church and charity for the poor of Polk County. "After observing the food pantry at Holy Spirit and attending Mass, I see how godly and devoted the parishioners of Holy Spirit are and I know I am doing God's work when I help them," shared Christine.

The Hackl children, Jim Jr. and Dorothy (Carl) Reiser, continue to build on their parent's legacy of philanthropy. They, along with their families, visit the Holy Spirit community when they can. On one visit in 2018, they met with Father Vargas, pastor of Holy Spirit; Gary Tester, president of Catholic Charities of Central Florida; and Kimberlee Riley, President and CEO of The Catholic Foundation of Central Florida, to review how the funds earned through the Hackl Endowments were being distributed

to benefit those highest in need in Polk County and how to maximize efficiency of the process to ensuring more were served.

During the pandemic, the Hackl Children met via Zoom along with The Catholic Foundation team and investment advisors, Concord Advisory Group, to strategize how to provide the maximum distributions from the Hackl Endowments during the market instability, within the spending policy, to address increased needs from the pandemic while preserving the fund corpus for the future. Out of compassion for those suffering in the community, the Hackl family offered donations in addition to the endowment distribution to serve the increased need.

The Hackl family legacy exemplifies how we return our gifts to God, pass on our faith, strengthen family values, and do God's work together.



Giving With A Catholic Heart

Born and raised in a small Montana town as the second oldest, Nick Degel's Catholic faith has always been an essential part of his life, and he credits his parents who sacrificed in order to send their children to Catholic schools. While a planned gift and endowment was something Nick wanted to do, he had not decided on a designated purpose until The Catholic Foundation invited him to visit the St. Vincent de Paul Regional Seminary with Bishop Noonan and a group of fellow Corpus Christi Society members.

"During the visit with the seminarians, I was touched by their dedication to Christ and His church, their sincere friendliness, and generosity with their visitors," he recalls. "These seminarians and new priests are vital to Christ's Church on earth and, as Catholics, we are blessed with their

commitment to His priesthood." Shortly after his visit, Nick decided to dedicate his endowment to providing support for the Diocese of Orlando seminarians.

Nick's original plan was to fund the endowment through his estate plan. However, he realized that there were some tax advantages to pre-funding the endowment through annual gifts from an IRA. "It is comforting to know that when I am no longer here, I will have left an inheritance that will continue to benefit a ministry that is close to my heart," Nick highlights. "I encourage others to consider this pre-funding strategy after consulting with their tax advisor and The Foundation. I can attest to the joy of seeing donations fulfill their intended purpose during one's lifetime."



Family Legacy Gift Honors The National Shrine

When Brent and Lisa Centlivre began their estate planning, they knew that they would want to leave a legacy gift in their will to the Basilica of the National Shrine of Mary, Queen of the Universe, to honor this sacred space that has meant so much to their family. For Brent, the journey to that decision started more than a quarter-century ago. As he was embarking on his career with Disney, where he recently celebrated his 25th anniversary, he began to attend Mass at the Shrine. He describes it as a yardstick measuring time in his journey of life.

“The Basilica is a special place for me. Plus, as someone in the travel industry, I am grateful there is such a magnificent place for tourists to celebrate Mass on their vacation.” Brent reflected further as he considered its significance. “And the Shrine has been such an important part of my life’s journey. I first attended Mass there when I was a young, single man and continued to attend with my wife, and now enjoy Mass there with my two daughters.”

Brent and Lisa decided to commemorate their marriage with a contribution to the Basilica. A bronze plate on the door to the Basilica recognizes their commitment to the Shrine and each other. “Growing up, my family attended Cathedral of Immaculate Conception in Fort

Wayne, IN. My great-grandfather donated a stained-glass window with his name on it. I remember seeing it and thinking, ‘Wow, C. L. Centlivre has his name on a window!’ I always wondered if it would be possible to see my name on a window or somewhere at a church that I attend. Now, when we walk into the Basilica and see our plate on the door, it holds such significance for us.”

Once Brent and Lisa made their decision to leave a charitable gift in their will for Mary, Queen of the Universe, they felt it was important to notify The Catholic Foundation to let them know the special place the Basilica holds in their heart. This qualified them as members of the Vivos Christi Legacy Gift Society and ensured the intentions for their future gift would be fulfilled. They hope their story inspires others who have been touched by the sacred beauty of the Basilica to consider leaving a legacy of their own so this ministry in Orlando can continue to touch the lives of visitors for years to come.



SCAN HERE

to learn more about these & other philanthropic journeys



**The Catholic Foundation
of Central Florida**
PLANNED GIVING ADVISORY COUNCIL

Planned Giving Advisory Council (PGAC)

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
The Burke/Cox Group

Christopher Garcia, CFP®, MBA
Charles Schwab

Kathleen Hagerty
University of Central Florida

Ty McCormack, CFP®, AIF®
Aksala Wealth Advisors

Ryan Plank, CFP®, CPFA
Merrill Lynch, Pierce, Fenner & Smith, Inc.

**Steve Thagard MBA,
CLU®, ChFC®, REBC®, CFP**
Northwest Mutual

Chair Robert Thomson
CPA, PFS, AIF, MBA
Trivergent Trust Company

Council Members (as of June 30, 2021)

Aaron J. Bert, CFP®, AIF®
Certified Financial Group, Inc.

Brendan Burke, CIMA, CRPC
The Burke/Cox Group

Vice Chair Darrell DeVaney, CFP
F4 Wealth Advisors

James Faubert, AAMS
Edward Jones

Amber Jade Johnson, JD
Law offices of Amber Jade Johnson, PA

**Eastern & Southern Deaneries
Chair, Wendy Mara, J.D. M.B.A.**
Mara Law, PA

Gregory Meier, JD
Shuffield, Lowman & Wilson

Matthew O'Kane, JD
Lowndes, Drosdick, Droster, Kantor & Reed, PA

Vanessa Skinner, JD
Winderweede, Haines, Ward & Woodman, PA

Johnny Svajko, CPA
Olivari & Associates CPAs & Consultants

Nationally Renowned Speakers Join PGAC Webinar



Central Florida financial advisors, estate attorneys and charitable gift professionals were treated to presentations from two nationally renowned speakers at the May 2021 Planned Giving Advisory Council (PGAC) webinar – Creating a Legacy of Discovery! The 29 attendees enjoyed hearing from Mark Weber, author of The Legacy Spectrum, provided great direction on how to enhance conversations with clients and donors to help them achieve their philanthropic goals and further generosity in our community; while Robert Cabana, Director of NASA's Kennedy Space Center, former astronaut and Divine Mercy parishioner, shared incredible insight into this exciting time for NASA, the Kennedy Space Center, our Central Florida community and the continued exploration of God's amazing creation!

Thank you

PGAC Founding Chair, Garrett Burke

Garrett Burke was instrumental in the establishment of the Planned Giving Advisory Council in September 2019. He completed his term in June 2021 and passed the reins to his Vice Chair, Rob Thomson. The Catholic Foundation is grateful to Garrett for his time and dedication to the establishment and growth of the PGAC.





Central Florida CAP® Study Group

Launching the Central Florida CAP® Study Group

The Catholic Foundation and F4 Wealth Advisors partnered to establish the first CAP® Study Group in Florida. This annual study group is designed to bring together client-facing advisors and nonprofit executives to earn the Chartered Advisor in Philanthropy (CAP®) designation provided by The American College of Financial Services. This designation signifies that the student has successfully passed exams for the three graduate-level courses. CAP® – they are only three little letters, but they stand for a big commitment to our clients and donors, our professional network, and our Central Florida community.

Each year the Central Florida CAP® Study Group will engage multi-sector, client-facing advisors including local wealth managers, estate attorneys, private bankers, insurance advisors, certified public accountants, and nonprofit executives to create a holistic network that can help clients and donors achieve their philanthropic aspirations and establish their charitable legacies. The 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 and regional speakers.

CENTRAL FLORIDA CAP® STUDY GROUP

Doing More Together For Our Community Through Philanthropy



The Catholic Foundation
of Central Florida



WEALTH ADVISORS



THE AMERICAN
COLLEGE
OF FINANCIAL SERVICES

Members of the Inaugural Central Florida CAP® Study Group:



Aaron J. Bert, CFP®, AIF®
Financial Advisor
Certified Financial Group, Inc.



Wendy Mara, J.D., M.B.A.
Principal Attorney
Mara Law, PA



Darrell DeVaney, CFP
Founder & Chief Wealth Architect
F4 Wealth Advisors



Gregory Meier, JD
Attorney/Partner
Shuffield, Lowman & Wilson



*** Amanda Livermore**
Vice President
Bishop Moore Catholic
High School



Robert Thomson, CPA, PFS, AIF, MBA
President & Chief Investment Officer
Trivergent Trust Company

** Received a partial scholarship from The Foundation to participate in the CAP Study Group*



SCAN HERE
to learn more about CAP®



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

Most Popular Giving Vehicles:

-  Life Insurance Beneficiary
-  Bequests
-  IRA Beneficiary
-  Charitable Remainder UniTrust
-  Charitable Gift Annuity
-  Real Estate

\$ 2,131,508 New Legacy Gift Commitments
68 Total Matured Gifts
\$4,828,584 Legacy Gifts Received

New Members (July 1, 2020)

Anonymous (8)	† Orlyn J. Marcus
† Thomas A. Anzalone	† Kathryn Maryan
† Genevieve R. Balgo	† Margaret Maxey
† Fr. Felix Banos	Ty and Kylan McCormack
† Fr. Luiz Bastos	† Catherine L. McGovern
Richard and Carol Beebe	† Elizabeth Metz
† Robert B. Bomberger	† Patricia A. Meuse
† Margaret E. England	Dominic Rego
† Albert M. Falcone	† Judith Ellen Rund
Michael and Jean Fasano	† Sister Janet Holzer, SFCC
† Patricia A. Fix	† Father Eamon J. Tobin
† In Memory of Mary T. Hamill and Walter Vilsmeier	† Patricia Arlene Tomkins
† Henry E. Kelly Jr & Patricia C. Kelly Trust	† Estelle M. Travis
Blanca Kokot	† James W. & Evelyn Trindle
† Robert P. Macho	† Dorothy G. Wilcavage
	† Richard J. Wiley

† May God grant eternal rest to the members who have been called home to the Lord.

Recipients Benefiting From Planned Gifts

Bishop Grady Villas/Magnify of Central Florida
 Catholic Charities of Central Florida
 Diocese of Orlando
 Diocese of Orlando for Seminarian Formation

24 Catholic Parishes
 5 Catholic Schools
 Basilica of the National Shrine of Mary, Queen of the Universe

Legacy Planning Seminars

Members of the PGAC shared their expertise with Catholics across the diocese through our Legacy Planning Seminars and Webinars. Attendees received valuable tools and resources to guide their estate and wills, financial and legacy planning. These educational series were hosted by:

Seminar – In Person Sessions:
 All Souls Catholic Church

Webinars – Zoom Sessions:
 Diocesan Catholic High Schools
 Blessed Trinity, St. Patrick and St. Luke's
 Western Deanery Parishes



SCAN HERE
 to learn how you
 can leave a legacy



Young Couple Creates Their Catholic Family Legacy

Ty and Kylan McCormack were making plans for their wedding and future together, and near the top of their list was a discussion about estate planning. As a financial planner and son of an estate planning attorney, Ty understands the value of having all of one's financial affairs in order at all times.

He had also been taught, from a young age, the value of philanthropy and the belief that "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).

"I was blessed to have been raised in a Roman Catholic family where our faith came before anything else. In my career and personal life, I am very prudent with money in regards to which organizations I trust with my assets. After doing a thorough analysis of The Catholic Foundation of Central Florida, I felt confident that there was no other place that would honor our charitable legacy better."

As a result of this same confidence, Ty became a founding member of The Catholic Foundation's Planned Giving

Advisory Council, endorsing The Foundation's philanthropic impact in Central Florida. This Council comprises a group of active and talented charitable gift and estate planning professionals dedicated to the mission and vision of The Catholic Foundation.

Upon notifying The Catholic Foundation of their plan to leave a legacy gift as partial beneficiary of a life insurance policy, Ty and Kylan, both age 28, became the youngest couple in the Vivos Christi Legacy Society. Ty and Kylan's gift creates an endowment that will support the Pre-Cana program at St. James Cathedral, where they attended. Their beautiful, selfless gift will make it easier for current and future generations of engaged couples to establish marriages based on Catholic values that promote family life centered on faith.

Ty and Kylan's gift demonstrates that it is never too early to begin planning your legacy of impacting lives and stewarding the gifts that God has given you. Creating your Catholic legacy can be a simple five-minute process of naming your favorite parish, school or ministry as a beneficiary in your life insurance policy, IRA or bank account.

College Student Establishes Catholic Legacy at CCM

Dominic Rego recalls his best memory with the Catholic Campus Ministry (CCM) community, which fosters faith among Central Florida college students. Dominic and a group of friends in the fall of 2020 drove from Orlando and spent the night at Cocoa Beach where Dominic practiced guitar, everyone sang praise-and-worship songs around a campfire, and the friends enjoyed a coffee-and-eggs breakfast the following morning as they watched the sun rise. At that moment, "I realized the people around me are like brothers and sisters," Dominic, 23, remarked.

So when Dominic enlisted in the U.S. Navy – while still attending the University of Central Florida (UCF) where he is currently a senior – he knew exactly who to name as a beneficiary of the life insurance plan that the Navy provides as part of his benefits. Dominic, who has gone on to graduate from UCF and serve the Navy, named CCM as the sole beneficiary of his life insurance plan. By establishing a legacy gift for CCM, Dominic has become the youngest member of The Catholic Foundation's Vivos Christi Society, which honors those who have made a planned gift supporting a Church ministry or entity.

"I had been thinking for a while about how I could make a lasting impact on CCM and this was it," Dominic says of his planned gift. "If only one person can benefit from my gift to CCM the way I have benefited from CCM, it will be worth it."



Faith and altruism infuse Dominic's world view: "I want to bring Catholic ideas to the Navy. I want to serve my country," says Dominic, a math major. "I want the U.S. to be a global force for good. I want to help protect the world. Hopefully, one day I'll earn a star on my shoulder as a Navy admiral."

The Church needs young Catholics to become dependable stewards, says Dominic, a self-described "cradle Catholic" who was an altar server as a child and has filled the same role at CCM. "College kids my age are the future of the Church. The Church will grow or shrink because of us. If we want it to do well in the future, we have to invest in it."

SCAN HERE
to learn more about
these and other
philanthropic stories





OUR CATHOLIC APPEAL

The Catholic Foundation of Central Florida

2021 appeal goal \$15.45 million

Pledges and Cash Gifts through 12/31/2021

- \$17,464,933
- 113.04% of goal
- 35,266 donors

84 parishes at 90% or more of goal

78 of these met or exceeded goal

152 Corpus Christi Society members

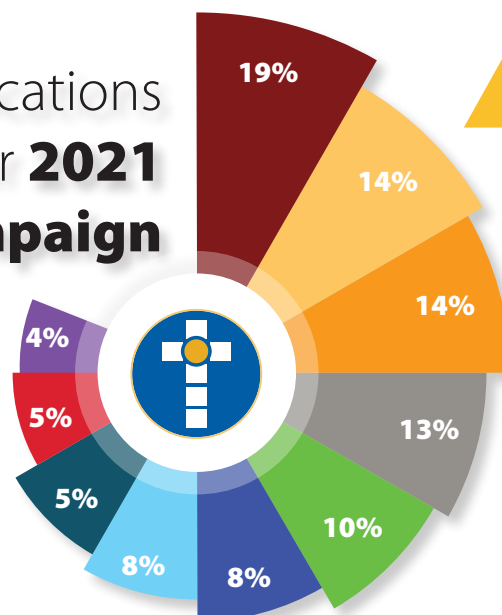
Total collected through 12/31/2021

\$16,766,327

(95.99% of pledged)

Do **ALL** to the 
of *Glory*
GOD

Allocations for **2021** Campaign



Leadership & Parish Life – 19%

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

Education – 14%

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

Human Dignity & Solidarity – 14%

Bishop Grady Villas, Catholic Charities of Central Florida, Culture of Life

Discipleship & Stewardship – 13%

Parish, School and Diocesan Development and Advancement Services, Donor Services

Ecclesiastical Property – 10%

Cemeteries, Design & Construction, Facilities Management, Real Estate, Security

Laity, Family & Life – 8%

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

Financial Services – 8%

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

Human Resources – 5%

Parish, School and Diocesan Human Resource Services, Victim Assistance, Safe Environment Certification

State & National Outreach – 5%

United States Conference of Catholic Bishops, Florida Conference of Catholic Bishops

Communications – 4%

Archivist, Communications, Florida Catholic Media, Faith Fit

Shepherd's Fund:

491 Donors

\$670,203 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



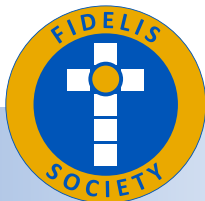
Corpus Christi Society Members

"Body of Christ" \$10,000+ annual gift

Anonymous (9)
Russel and Amy Allinson
Andrew P. Caneza Family Foundation
Selim and Huguette Ayoub
Steve and Charlene Baber
George and Peggy Baker
Timothy and Anita Behler
Albert and Mary Bergeron
Joe and Carol Bert
Michael and Melissa Bianculli
Nathan and Anna Bond
Kevin and Jennifer Bowler
Eric and Cherie Brinkman
Michael and Jetnareth Broom
Patrick and Beth Brown
Kenneth and Mary Burke
Mrs. Julie Burkey
Lisa and Jim Burrell
Edmund and Susan Cain
John Capone and Diana C. Ballard
Larry and CeCe Carroll
Tom and Peggy Chandler
Mrs. Roberta Cheever
Patrick and O'Ann Christiansen
Anthony and Lynda Coppola
Peter and Deborah Costello
Estefano and Norma Crisafi
Gary and Donna Cupal
Ronald and Paula Davoli
Myra and Dorothy Degamo
Mr. Nicholas J. Degel
Frank and Michelle DeLuca
Mrs. Mary Demetree
Dave and Lynda Dennis
David and Anne Dore
James and Deborah Doyle
Mr. Gerard Egel
John and Christine Elnitsky
Mrs. Cathy Engelman
Michael and Frederika Erdman
Ernest and Tina Euler
Orlando and Carolyn Evora
Ms. Amber Farrell
Francine M. Ferguson and Lance Holbert
Ms. Elaine Fisher
Thomas and Joan Flavin
Gavin and Annette Ford
Brian and Dolores Franz
Edward and Karen Gallagher

Mrs. Shirley Geitner
Mike and Pam Gilardi
David and Sandra Gotwalt
Mrs. Chris Gray
Leida Haddock and Robert Wright
Mrs. Denise A. Hall
Mr. Andrew Hannigan
Alfred and Mary Harms
Anthony and Laura Hemgesberg
Ron and Celeste Henkelman
Mr. John Higgins
Mrs. Gretchen Hofmann
Eric and Diane Holm
Richard and Josephine Irumudomon
David and Anne Jacobs
Robert and Kathleen Jankowski
Stephen and Marva Johnson
Mrs. Barbara Josephs
Samuel and Constance Kaleel
Allan and Linda Keen
Mark and Cindy Keenan
Timothy and Kathleen Kiley
Chris and Lisa Killer
Robert and Judy Kryger
Chip and Ann Landon
Randy and Donna Larson
Mrs. Juanita Lentz
Richard and Frieda Licursi
Douglas and Jennifer Lieb
Mrs. Dorothy Linguadoca
Brian and Janet Lower
Jose and Mary Mandry
Mel and Kitty Martinez
Harvey and Carol Massey
Reverend Ed McCarthy
James and Melanie McManus
Mr. Charles McNulty
Randy L. Means and Carol Brinati
Joseph and Lisa Mirante
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.
Gerald and Marilyn Ogier
Mark and Robin Ogier

Gordon and Christina Olson
Lusant and Mariher Ordenez
Bill and Jody Orosz
Reverend David Page
Louis and Paulette Paradiso
Mr. Michael A. Perry
Mr. Richard Pesola
Thomas and Selby Prince
Terry and Jeanne Quigley
Eduardo and Sheila Rabel
Mrs. Billie Jo Rachuba
Patrick and Louise Rainey
Jose and Pearl Ramirez
Paul and Marilyn Rathbun
Daniel and Jill Renuart
Melvin and Terri Riecher
Mrs. Maria M. Rivera
Phillip and Lina Ruhlman
Gabriel and Sandra Ruiz
Mrs. Marilyn C. Russell
Ms. Janice Salerno
Joe and Penny Savona
Peter and Teresa Schaefer
John and Helen Schaffer
Mrs. Ardith Schiller
Scott and Kimberly Schmitt
Lee and Mariann Schmudde
Richard and Dolores Shantz
Richard and Janet Skipper
Mr. Alfredo J. Solarte
Todd and Lisa South
David and Mary Spacone
Rick and Marlys Strube
Stephen and Cindy Strube
Steven and Jill Thagard
Mrs. Ann Marie Turner
Keith and Donna Van Allen
Robert and Stephanie Vaughn
Dave and Ann Vogelpohl
Ms. Theresa Wahl
Stephen and Erin Wallace
Bob and Mary Wells
Dr. Thomas Winters and Dr. Rebecca Moroosse
Frank and Nita Witt
Alfred and Patricia Wyborski
Steve and Lori Zepf
Robert and Renda Zielke
Victor and Jaquelynn Zollo



Fidelis Society

"The Faithful"

Any size gift for
5 consecutive years
18,819 Members



Lumen Christi Society

"Light of Christ"

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



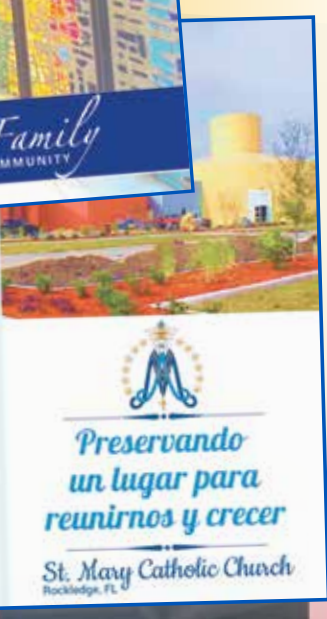
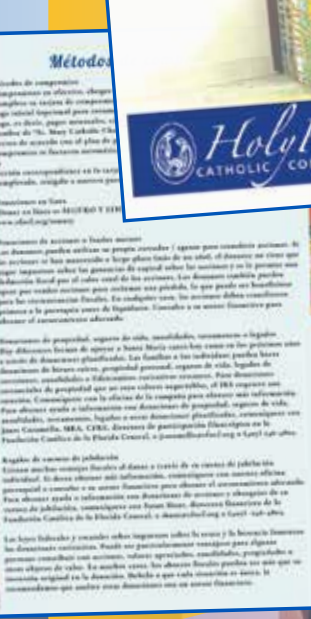
Spes Christi Society

"Hope of Christ"

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

- St. Mary, Rockledge: **\$347,956 (118 donors)**
- St. Faustina, Clermont: **\$643,291 (203 donors)**
- Holy Family, Orlando: **\$979,980 (194 donors)**

- St. Mary, Rockledge: **\$347,956 (118 donors)**
- St. Faustina, Clermont: **\$643,291 (203 donors)**
- Holy Family, Orlando: **\$979,980 (194 donors)**





Supporting Parish Financial Wellness

Offertory Recovery and Restoration Initiative (ORRI) and Online Giving Campaign (OGC)

\$9.3 Million

Total increase since the
program inception

\$536,991

Additional funds collected
by two parishes

115%

Average increase
Online Giving Donors

12%

Average offertory increase



+ \$8 Million

collected in the offertory by participating
parishes (Oct 2020-2021)

\$3,452,380 (43%)

of the total offerings were
from Online Giving

224%

Average increase
Online Giving Donations

15.4%

Envelope response rate

13 parishes and **2** missions participated in the Offertory Recovery and Restoration Initiative (ORRI) and Online Giving Campaign (OGC) from October 2020 to 2021.

ORRI and OGC Participants:

All Souls Catholic Church, Sanford
Blessed Trinity Catholic Church, Ocala
Christ the King Catholic Mission, Citra
Church of the Resurrection, Lakeland
Immaculate Heart of Mary, Candler
Misión Católica La Guadalupeana, Ocala
Church of the Nativity, Longwood

Our Lady of Lourdes Catholic Church, Melbourne
St. Augustine Catholic Church, Casselberry
St. Catherine of Siena Catholic Church, Kissimmee
St. John Vianney Catholic Church, Orlando
St. Joseph Catholic Church, Lakeland
St. Luke Catholic Church, Micco
St. Rose of Lima Catholic Church, Poinciana



BLESSED TRINITY
CATHOLIC CHURCH

Christ The King
Catholic Church



SAINT LUKE'S
CATHOLIC CHURCH



All Souls
CATHOLIC CHURCH



IMMACULATE
HEART OF MARY



RESURRECTION
CATHOLIC CHURCH & SCHOOL



St. Thomas Aquinas
CATHOLIC CHURCH



St. Catherine of Siena
CATHOLIC CHURCH / KISSIMMEE, FLORIDA



Statements of Financial Position

ASSETS

	June 30	
	2021	2020
Cash and cash equivalents	\$1,248,519	\$1,090,427
Investments, including agency funds held	\$88,040,454	\$58,904,822
Other assets	\$556,028	\$1,025,005
TOTAL ASSETS	\$89,845,001	\$61,020,254

LIABILITIES AND NET ASSETS

Accounts payable and accrued liabilities	\$168,882	\$104,022
Agency obligations	\$62,910,611	\$40,042,438
Other liabilities	\$775,295	\$700,574
Total liabilities	\$63,854,788	\$40,847,034
Without donor restrictions	\$1,630,886	\$1,468,448
With donor restrictions	\$24,359,327	\$18,704,772
Total net assets	\$25,990,213	\$20,173,220
TOTAL LIABILITIES AND NET ASSETS	\$89,845,001	\$61,020,254

This information is derived from our audited financial statements for the year ending June 30, 2021. A complete set of financial statements and the related footnote disclosures audited by Batts Morrison Wales & Lee, P.A. is available upon request.



Statements of Activities

REVENUE

For Year Ending June 30

	2021	2020
Development and stewardship service fees	\$1,983,678	\$2,275,695
Investment management service fees	\$272,653	\$240,902
Contributions with donor restrictions	\$1,461,166	\$1,121,316
Contributions without donor restrictions	\$266,879	\$269,383
Investment income net	\$5,209,722	\$178,478
Total public support and revenue and net assets	\$9,194,098	\$4,085,774

EXPENSES

Community Services	\$1,319,489	\$1,347,027
Grantmaking and managing charitable funds	\$1,109,014	\$974,086
Donor services	\$425,023	\$431,551
Management and general and fundraisings	\$523,579	\$473,434
Total expenses	\$3,377,105	\$3,226,098
CHANGE IN NET ASSETS	\$5,816,993	\$859,676
NET ASSETS - Beginning of year	\$20,173,220	\$19,313,544
NET ASSETS - END OF YEAR	\$25,990,213	\$20,173,220



SCAN HERE for complete audited financial statements



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

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Established in 2008, The Catholic Foundation is an independent, nonprofit foundation that serves donors and pastors through nine counties to support our Central Florida community needs. Its assets of more than \$87 million in investments are managed for growth and to respect Catholic social teaching. Endowment distributions, since 2012, have provided \$14 million to support education, housing, healthcare and hunger needs in our community as well as Catholic parishes. We help individuals and organizations engage in philanthropy in a faith-filled way through socially screened investment options. As a proven trustworthy philanthropic organization to give to and give through, we have received the GuideStar Platinum Seal of Transparency and been recognized annually by the International Catholic Stewardship Council and in 2021 received the Corporate and Foundation honoree award from the Association of Fundraising Professionals for National Philanthropy Day.



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