

# 2024 IMPACT+ REPORT



## Stewardship in Action



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

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Platinum  
Transparency  
2025

**Candid.**

As a trusted and transparent community foundation serving catholic donors we are pleased to earn the highest rating exceeding nonprofit industry standards.



## 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.

## Vision

To be the foremost philanthropic organization through which our community contributes to fund God's work in order to impact lives and promote the Gospel, which builds the Kingdom of God.

## Values

FAITH-FILLED  
PASSION

COLLABORATION

TRANSPARENCY

SERVANT  
LEADERSHIP

STEWARDSHIP

IMPACT

Hallelujah!

*Praise the LORD from  
the heavens; praise him  
in the heights*

(Psalm 148:1)



## Beloved Stewards of God's Creation:

Pope St. John Paul II defines our being, "The believer, in a sense, is "the shepherd of being," that is, the one who leads all beings to God, inviting them to sing an "alleluia" praise." The Psalmist defines the cosmic church, whose apse is the heavens and whose aisles are the regions of the world. Led by your faithfulness, all God's creatures come together and sing His praise.

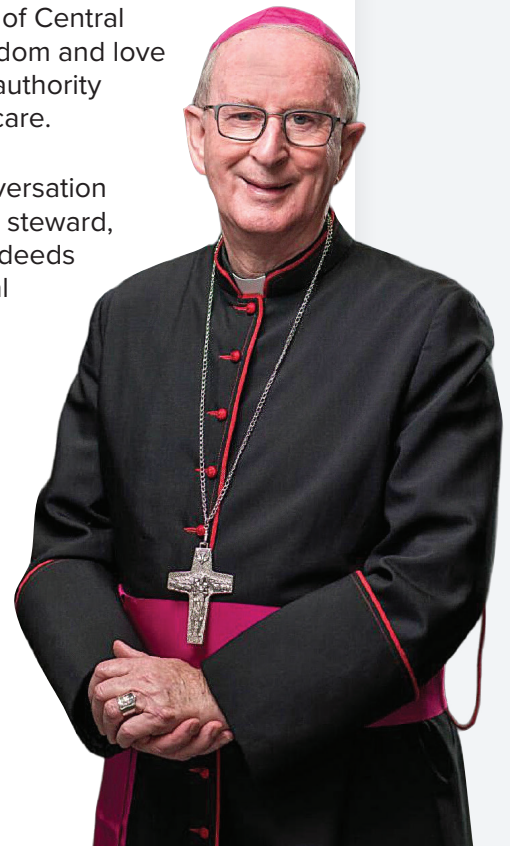
As we serve God by sowing the seeds of Divine Love, the harvest yields fruit of hope, a Eucharistic offering through the Spirit of our soul. We taste the goodness of God, His splendor and majesty spreads like fires by our every thought, word, and deed, our care for all creation.

The areas of service provided by The Catholic Foundation of Central Florida exercise stewardship, sharing in the boundless wisdom and love of God. The board members, staff and donors offer God's authority over these funds so that God's people receive His tender care.

As you read this Impact Report, pray Psalm 148 and in conversation with God, reflect upon the many ways in which you are His steward, entrusted with the well-being of one another. By the good deeds of many, the services of The Catholic Foundation of Central Florida praise the Lord in the heights! May we thus receive God's heart as our own.

Sincerely yours in Christ,

**Most Reverend John Noonan**  
Bishop of Orlando







# Stewardship in Action:

## *A Message of Gratitude and Hope*

### From the Board Chair and President and CEO of The Catholic Foundation of Central Florida

As we reflect on a year of growth and transformation, we acknowledge a significant moment in our Foundation's journey—the leadership transition of both our CEO, Kimberlee Riley, and Chair of the Board, J. Thomas Chandler. We deeply appreciate the time and talent they devoted to the Church, as well as their unwavering commitment to developing disciples into stewards and expanding the endowment, resulting in a wide range of benefits for both Catholics and the broader Central Florida community. This report comes at a pivotal time, as we look back with gratitude on what we have accomplished, while also setting our sights on the future, rooted in Christ's love.

Our commitment to Stewardship in Action remains steadfast as we strive to serve our community with compassion, integrity, and generosity. This report is not just a record of progress; it is a message of love—a testament to the lives touched, the people served, and the foundation being laid for future generations. Our focus continues to be on harmonizing with partners to maximize impact. We're dedicated to evolving our programs to better serve all those we reach.

We recognize none of this would be possible without you—our partners, donors, and supporters. Your generosity, prayers, and guidance are invaluable as they help shape and strengthen our efforts. Together, we are serving an amazing and deserving community, one is rooted in love, faith, and shared commitment.

As we expand our reach across the nine counties of the Diocese of Orlando, we are more committed than ever to providing long-term financial stability, enabling us to deepen our impact and bring the Church to its fullness of charity. Through the continued growth of our endowments, we are helping to ensure these contributions will have a lasting impact. Thanks to your generosity, we were able to recommend over \$2.9 million in distributions this year, supporting essential needs across our community. These contributions have made a direct impact through:

- ▶ **Evangelizing and Faith Formation for all ages**
- ▶ **Catholic School Tuition Assistance**
- ▶ **Housing and Employment Services for adults with disabilities**
- ▶ **Basic Needs for our neighbors, including food and healthcare**
- ▶ **Support for Priest Retirement and Seminarian Formation**

In addition to this progress, we've welcomed new team members whose energy, dedication, and expertise are propelling us forward. Their fresh perspectives are helping us deepen our impact and ensure our work continues to evolve to meet the challenges of tomorrow.

Looking ahead, we are excited to engage with Catholic philanthropists to build the Kingdom of God here in Central Florida. Your continued faith and support make our work possible, and for that, we give thanks to God and to you.

On behalf of the Board of Directors and Foundation staff, thank you for partnering with us.

Together in Christ,



*Karen Monteleone*  
**Karen Monteleone**  
Chair

*Madelyn T. Weed*  
**Madelyn Weed, CFRE, CAP®**  
President and CEO







# \$113.4 Million

Assets Under Management  
as of June 30, 2024

Catholic Compliance Rate

## 99.5%

The United States Conference of Catholic Bishops (USCCB) guidelines group their policies on Catholic Compliant Investing into five key categories which the CFOCF incorporates into its investment decisions:

Protecting  
Human Life

Promoting  
Human Dignity

Enhancing the  
Common Good

Pursuing  
Economic Justice

Saving Our Global  
Common Home

# Fiscal Year 2024

## Investment Management Impact Stats

July 1, 2023 – June 30, 2024

### Total Assets Under Management

Fund Type	# of Funds	Market Value
Endowment Funds	152	\$ 81,330,922
Reserve Funds	39	\$ 31,352,222
Donor Advised Funds	14	\$ 681,840
Charitable Gift Annuities	13	\$ 471,193

### Funds By Areas of Interest (Endowment + Reserves)

Interest	# of Funds	Market Value
Catholic College and University	3	\$ 1,922,775
Catholic Education	74	\$ 49,340,699
Church Leadership and Development	6	\$ 12,590,333
Clerical Life	8	\$ 7,727,325
Outreach Ministries	10	\$ 9,165,968
Parish Life	90	\$ 31,936,044
Donor Advised Funds	14	\$ 681,840

### Total Available Distributions

Area of Interest	# of Funds	Market Value
Catholic Campus Ministries	\$	66,902
Catholic Charities	\$	165,658
Ministry Support	\$	470,882
Parish Life	\$	623,458
Polk County Charity	\$	49,715
Priest Retirement	\$	157,177
Scholarship / Tuition Assistance	\$	1,209,865
		<b>\$ 2,743,657</b>



Scan to learn more about our  
Investment Management Services

# Donor Stories



Scan to learn  
more about  
Donor Stories



## St. Mark Catholic Foundation Endowment Fund

Reflecting a life dedicated to serving God, Mark envisioned a legacy that generates a perpetual income stream to support the operations of The Catholic Foundation so it can continue its charitable initiatives, serving the spiritual and corporal needs of the community, as well as its work to provide philanthropic guidance to donors and the Catholic parishes, schools and ministries throughout the Diocese of Orlando especially those dedicated to serving the poor, disabled and hungry, in generating perpetual income streams. He established the St. Mark Endowment to fulfill that vision.

Learn more at: [cfocf.org/stmarkfund](https://cfocf.org/stmarkfund)

## Catholic Lawyers Guild Endowed Scholarship Fund

This newly endowed scholarship fund ensures future lawyers (traditional or canon) can financially complete their degree and integrate the teachings of the Church with traditional legal values, reinforcing the mission and impact of Catholic legal practitioners in our community. The Endowed Scholarship Fund is the Guild's way of serving those who serve all the faithful while nurturing budding lawyers, so they cling throughout their careers to the good, the true, and the beautiful embedded in our Catholic faith.

Learn more at: [cfocf.org/catholiclawyersguild](https://cfocf.org/catholiclawyersguild)



## Gratitude Lenten Pilgrimage

The Catholic Foundation was honored to organize a Gathering in Gratitude Lenten Pilgrimage on March 22, 2024, on behalf of Bishop Noonan and The Foundation's Board of Directors. This was a special gathering of those who have returned their blessings to the Lord as endowment fundholders and members of the Corpus Christi, Spes Christi, Vivos Christi, and St. Katharine Drexel Societies.

Graciously hosted by St. John the Evangelist Catholic Community in Viera, Bishop Noonan led the 50 attendees through the Stations of the Cross followed by a Lenten lunch, program and visit to the Our Lady of Lourdes Grotto.

Donors were recognized for their generosity which provides education, faith formation and shelter for the homeless, food for the hungry and medicine for the sick. It also supports priests in retirement and seminarians who are dedicating their lives to serving us.



July 1, 2023 – June 30, 2024

# 2024 Endowment Funds

## Catholic College and University

\$1.9 M

Bishop Stephen D. Parkes  
Endowment for Catholic  
Campus Ministry

Catholic Campus Ministry  
Endowment Fund

Catholic Campus Ministry  
Endowment Fund (AIC)

## Catholic Education

\$35.7 M

Adelaida Valdes  
Endowment Fund

Joe Skinner Endowment Fund

St. John Vianney Catholic School  
Endowment Fund

AIC Tuition Assistance

Kelly Reen Memorial Fund

St. Margaret Mary School Teacher  
Endowment Fund

Andrew P. Caneza Foundation  
Endowment Fund

Leonard T. (Pat) Murphy  
Scholarship Endowment

✦ St. Peter Catholic School Angel  
Fund

Ann Hefferin Memorial  
Endowment Fund

Maria Boudet & de la Roza Family  
Endowment Fund

St. Timothy Catholic Church  
Educational Endowment Fund

✦ Bill Dunn Alumni Scholarship  
Endowment Fund

Marie Nolin Scholarship  
Endowment

The Annunciation Catholic  
Academy Endowment and  
Charitable Trust

Bud Farmer Scholarship Fund

Melbourne Central Catholic  
Endowment Fund

The Dorothy and Walter Shelley  
Family Scholarship Endowment  
Fund

Church of Our Saviour Catholic  
School Endowment

Murray Scholarship  
Endowment Fund

Dave Powers Memorial  
Endowment Fund

Our Lady of Hope Catholic  
Education Endowment Fund

The Henry S. Sitkowski Memorial  
Scholarship Endowment

Dawn Michelle Aberwald  
Memorial Endowment Fund

Our Lady of Lourdes (Melbourne)  
School Endowment Fund

The Ian A. Gilmore Memorial  
Scholarship Endowment

Deforest W. and Margaret Y.  
Bullard Scholarship Fund

✦ Our Lady of Lourdes Catholic  
Church and School Endowment  
Fund

The Jillian Elizabeth Blais  
Memorial Scholarship  
Endowment Fund

Elizabeth Buckley Scholarship  
Fund

Raymond H. Giel Endowment  
Fund for St. Paul School

The Men of Holy Family School  
Endowment Fund

Fr. Frank Zammit  
Endowment Fund

Resurrection Catholic School  
Endowment Fund

The Michael Scheve Endowment  
Fund

Fr. Joseph Nolan Education  
Endowment Fund

Richard L. & Rita C. Lienenbrink  
Scholarship Endowment

The Sister Elizabeth Murphy  
Tuition Assistance Fund

Fr. Sean Heslin Scholarship  
Endowment Fund

Ronald and Patricia Gendreau  
Endowment Fund

The St. Teresa Catholic School  
Endowment Fund

Gary Burkey Student-Athlete  
Endowment Fund

Santa Fe Catholic High School  
Endowment Fund

The Sylvia Hope Horrigan  
Memorial Scholarship  
Endowment

Gentile Scholarship  
Endowment Fund

St. Andrew School Endowment

Tuition Assistance Scholarship  
Endowment Fund

Guardian Angel  
Endowment Fund

St. Anthony's Catholic School  
Endowment Fund

Xavier Leyva Quintana  
Scholarship Endowment Fund

Holy Redeemer Catholic School  
Endowment Fund

✦ St. Charles Borromeo Catholic  
Church and School Endowment  
Fund

Joanne C. Brown  
Endowment Fund

St. James Cathedral School  
Endowment Fund

Joe Cadden Memorial  
Scholarship Endowment Fund

## Church Leadership and Development

\$10.8 M

Recruiting and Forming Clergy  
and Lay Leaders Endowment  
Fund (AIC)

The Catholic Foundation of  
Central Florida Endowment  
Fund

## Clerical Life

\$7.7 M

Bishop Dorsey Endowment

Degel Family Endowment  
Fund for Seminarians

Emmaus Endowment Fund

Priests' Retirement Fund

Prince-Olson Family  
Vocation Scholarship  
Endowment Fund

Seminarians Fund

## Outreach Ministries

\$6.6 M

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

✦ = NEW THIS FISCAL YEAR



Scan to learn  
more about  
**Endowment  
Funds**





# 2024 Endowment Funds

July 1, 2023 – June 30, 2024

## Parish Life

\$18.6 M

Albert J. and Christine M. Hackl Endowment Fund for the benefit of Holy Spirit Church	Holy Redeemer Catholic Church Endowment Fund	St. Ann Catholic Church, Debary Endowment Fund	✦ St. Mark Catholic Foundation Endowment Fund
All Souls Catholic Church Capital Improvement Fund	Holy Spirit Catholic Church, Lake Wales Endowment Fund	St. Ann Catholic Community, Haines City Endowment Fund	St. Mark the Evangelist Catholic Church Endowment Fund
All Souls Catholic Church Endowment Fund	Holy Spirit Catholic Church, Mims Endowment Fund	St. Anthony Catholic Church Endowment Fund	St. Mary Catholic Church Endowment Fund
Annunciation Catholic Church Endowment Fund	Immaculate Conception Catholic Church Endowment Fund	St. Augustine Catholic Church Endowment Fund	St. Mary of the Lakes Catholic Church Endowment Fund
Ascension Catholic Church Endowment Fund	Immaculate Heart of Mary Catholic Church Endowment Fund	St. Brendan Catholic Church Endowment Fund	St. Matthew Catholic Church Endowment Fund
Basilica of St. Paul Endowment Fund	Kathryn M. Goggin Endowment for Marian Devotion	St. Catherine of Siena Catholic Church Endowment Fund	St. Matthew Catholic Church Endowment Fund (OCA)
Blessed Sacrament Catholic Church, Clermont Endowment Fund	Monsignor Harte Memorial Care of the Basilica Endowment	St. Charles Borromeo Catholic Church Endowment Fund	St. Maximilian Kolbe Catholic Church Endowment Fund
Blessed Sacrament Catholic Church, Cocoa Endowment Fund	Most Precious Blood Catholic Church Endowment Fund	St. Faustina Catholic Church Endowment Fund	St. Patrick Catholic Church Endowment Fund
Blessed Trinity Catholic Church, Ocala, Endowment Fund	Our Lady of Grace Catholic Church Endowment Fund	✦ St. Frances Xavier Cabrini Catholic Church Endowment Fund	St. Paul Catholic Church Endowment Fund
Blessed Trinity Catholic Church, Orlando Endowment Fund	Our Lady of Hope Catholic Church Endowment Fund	St. Francis of Assisi Catholic Church Endowment Fund	St. Peter Catholic Church Endowment Fund
Church of Our Saviour Endowment Fund	Our Lady of Lourdes Catholic Church Endowment Fund	St. Isaac Jogues Catholic Church Endowment Fund	St. Philip Phan Van Minh Endowment Fund
Church of the Epiphany Endowment Fund	Our Lady of Lourdes Catholic Church, Melbourne Endowment Fund	St. James Cathedral Endowment Fund	✦ St. Rose of Lima Catholic Church Endowment Fund
Church of the Nativity Endowment Fund	Our Lady of the Springs Catholic Church Endowment Fund	St. John Neumann Catholic Church Endowment Fund	St. Stephen Catholic Church Endowment Fund
Corpus Christi Catholic Church Endowment Fund	Our Lady Star of the Sea Endowment Fund	St. John the Evangelist Catholic Church Endowment Fund	St. Teresa Catholic Church, Titusville Endowment Fund
Divine Mercy Catholic Church Endowment Fund	Prince of Peace Catholic Church Endowment Fund	St. John Vianney Catholic Church Endowment Fund	St. Theresa Catholic Church, Belleview Endowment Fund
Endowment Fund of the Basilica of the National Shrine of Mary, Queen of the Universe Shrine	Queen of Peace Catholic Church Endowment Fund	St. Joseph Catholic Church, Orlando Endowment Fund	St. Thomas Aquinas Catholic Church Endowment Fund
Fred Enck Justice Ministry Endowment Fund	Resurrection Catholic Church Lakeland Endowment Fund	St. Joseph Catholic Church, Palm Bay Endowment Fund	St. Timothy Catholic Church Endowment Fund
Good Shepherd Catholic Church Endowment Fund	Resurrection Catholic Church, Winter Garden Endowment Fund	St. Joseph Catholic Church, Winter Haven Endowment Fund	St. Vincent de Paul Catholic Church Endowment Fund
Holy Family Catholic Church Endowment Fund	Sacred Heart Catholic Church Endowment Fund	St. Joseph, Lakeland, Catholic Church Endowment Fund	Sts. Peter and Paul Catholic Church Endowment Fund
Holy Name of Jesus Catholic Church Endowment Fund	St. Andrew Catholic Church Endowment Fund	St. Jude Catholic Community Endowment Fund	
		✦ St. Lawrence Catholic Church Endowment Fund	
		St. Margaret Mary Catholic Church Endowment Fund	

✦ = NEW THIS FISCAL YEAR



Scan to learn more about  
**Endowment Funds**

## Catholic Education \$13.6 M

Annunciation Catholic Academy  
Capital Reserve Fund

Bishop Moore Catholic High School  
3-5 Year Reserve Fund

Coto Family Fund

✦ Deforest W. and Margaret Y. Bullard  
Scholarship 5+ Year Reserve Fund

Elizabeth Buckley Scholarship Fund  
5+ Year Reserve

Father Joseph Nolan Education  
Reserve Fund

Fr. Paul Kamide Fund for the Epiphany  
Help Center

Hall Family Tuition Assistance Fund

Holy Family Catholic Church 3-5 Year  
Reserve Fund

Janice R. Lyons Memorial Scholarship  
Reserve Fund

John Kevin Doyle Fund

✦ Morning Star Catholic School  
3-5 Year Reserve Fund

✦ Morning Star Catholic School  
5+ Year Reserve Fund

Perrault Family Fund

Robert J. Peterson  
Memorial Endowment Fund

✦ St. Charles Borromeo Catholic Church  
and School 3-5 Year Reserve Fund

St. James Cathedral School  
3-5 Year Reserve Fund

St. Margaret Mary School Teacher  
Endowment Fund 5+ Year Reserve

Trinity Catholic High School  
3-5 Year Reserve Fund

## Church Leadership and Development \$1.8 M

CFOCF 3-5 Year Cash Reserve Fund

CFOCF 5+ Year Cash Reserve Fund

Deacons 5+ Year Reserve Fund

Emmaus 3-5 Year Reserve Fund  
Clerical Life

## Clerical Life \$74 K

Seminarians - Dorsey (INT POOL)

Seminarians - Other Quasi Endowment

## Outreach Ministries \$2.5 M

Bishop Grady Villas  
Temporarily Restricted Fund

Blessed Trinity Ocala Reserve Fund  
for Brother's Keeper Ministry

Central Florida Catholic Mercy Fund

The Affordable Housing Fund

The Shepherd's Fund (INT POOL)

## Parish Life \$13.4 M

✦ Basilica of St. Paul Church and School  
Quasi-Endowment Fund

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  
5+ Year Reserve Fund

The St. Stephens Catholic Community  
3-5 Year Reserve

✦ = NEW THIS FISCAL YEAR



Scan to learn  
more about  
Reserve Funds



## Shepherd's Fund

The Shepherd's Fund provides the Bishop the capacity to respond to pressing needs, special projects, or extraordinary circumstances that are not covered by the diocesan budget and for which no other revenue source is available.

Cash received:

**\$314,147**

Unique donors:

**255**



Scan to learn  
more about  
Shepherd's Fund

# Experience the Joy of Catholic DAFs



July 1, 2023 – June 30, 2024

Donor Advised Fund Dollars

**\$681,840**

Total Number of DAFs

**14**

DAF Grants Distributions

**\$168,773**

Number of Grants Distributed

**139**

Organizations Supported

**44**

New Funds

**2**

Thomson Family  
Donor Advised Fund

The Lincourt Charity Account  
Donor Advised Fund

DAF Payout Rate

**29%**



Scan to learn  
more about  
DAFs.



## The Ordoñez Family

*We are all called to become saints and help others, and it's with this goal that our family set up a Donor Advised Fund (DAF). We are thankful for the excellent service that The Catholic Foundation provides and appreciate the relationships we have built.*

## Organizations Supported







## Blessed Trinity Brother's Keeper

Diaper Program \$2,000

## Find Feed Restore

Housing First Program \$5,000

## IDignity

Identification Services Program \$5,000

## Liz's Legacy Foundation

Mental Health Scholarship Program \$5,000

## Matthew's Hope

Shower Expansion Program \$5,000

## St. Matthew Catholic Church

St. Kateri Garden Program \$5,000

**Total 2024 Grants: \$27,000**

### Events Included:

Kickoff Mass & Luncheon with Bishop Noonan  
Pitch Party • Grant Finalist Site Visits • Grant Awardee Celebration

## 2024 WPGC Membership

Yvette Acevedo	Mary Gmach	Karen Monteleone*	Joan Van Lancker
Debbie Balaschak	Rosemarie Grebe	Ultima Morgan	Cathy Weite
Terri Becher*	Mary Jo Haddad*	Jody North*	Patti Ann Welter
Anita Behler*	Laura Haftel*	Kelly Ordoñez	Charlotte White*
Niki Bendix	Kathleen Hagerty*	Elizabeth Oros	Dr. Erika Wikstrom
Carol Bert*	Nia Herald	Jody Orosz	Paula Yamakaitis*
Kelly Bert	Patricia Kahle*	Michelle Palmano*	Rachel Youngs*
Barbara Bowden*	Dr. Kathleen Kiley	Zeynep Portway	<b>* New 2024 Members</b>
Linda Casey*	Dr. Ester Lincourt*	Kimberlee Riley	
Wanda Chandia*	Amanda Livermore	Theresa Simon	
Dr. Margaret Curran	Sarah Luter	Sally Studlo	Sr. Maria Teresa Acosta, SCTJM
Patti Deegan*	Marianne Lyon*	Marta Sweeney	<b>Spiritual Advisor</b>
Dr. Lynda Dennis	Barbara Malkus	Valerie Swets	
Stevie Dennis*	Lisa Meier	Loly Thomas-Chubbs*	Madelyn Weed <b>Foundation Representative</b>
Mary Ann Fox*	Tyler Minton*	Dr. Wendy Thomson	
Carol Frechette*	Layne Missigman*	Lori Tolland	
Diana Garcia	Dr. Caroline Molins	Morgan Toney*	



Scan the  
QR code to  
learn more.

# St. Katharine Drexel Society

July 01, 2023 – June 30, 2024

**150 members**

**\$87,789 Gifts \***

\*Total raised not including \$145,600 pledged  
by our generous planned gift donors

"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



The St. Katharine Drexel Society Recognizes donors whose annual financial support  
for The Catholic Foundation helps us elevate philanthropy in Central Florida.

## THANK YOU

Anonymous Donors (14)  
+Yvette and Miguel Acevedo  
Patty Andrews  
Deborah and Jim Balaschak  
Terri and John Becher  
Anita and Timothy Behler  
Niki and Joseph Bendix  
Joseph and Maria Berard  
Nathaniel and Frances Bernardo  
Aaron and Kelly Bert  
Joe and Carol Bert  
Barbara and David Bowden  
Kevin and Jennie Bowler  
Pasqual and Jessica Bracero  
Garrett and Amanda Burke  
Tom and Margaret Burns  
Joseph and Deborah Cardamone  
Kevin and Linda Casey  
Jonathan and Christina Cassaw  
John Castaldo  
Wanda and Patricio Chandia  
Tom and Peggy Chandler  
Margaret and Tom Curran  
Bonnie Decker  
Patricia and Patrick Deegan  
Lynda and Dave Dennis  
Stephanie and Sean Dennis  
Christopher and Melissa Douglas  
Colleen Duris  
Edyth Bush Charitable Foundation  
Miguel Figueroa  
Paul Flaig  
Charities Aid Foundation  
Mary Ann and Gregory Fox  
Carol Frechette

Manuel Garcia  
Diana Garcia  
Chris Gardner Family  
James and Cindy Geary  
Stephen and Meghan Gerrish  
Ted and Mary Gloo  
Mary Gmach  
Joseph and Renate Gmerek  
Elaine Goble  
Elisha Gonzalez  
Juan Grau  
Rosemarie Grebe  
Ron and Cheryl Gulasa  
Mary Jo and Fred Haddad  
Laura and Matthew Haftel  
Kathleen Hagerty  
Constance Hayes  
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Marianne and Bill Lyon  
Cynthia Maharg

Barbara Malkus  
Wendy and Robert Mara  
Ty and Kylan McCormack  
Timothy and Kathleen McDaniel  
Denis and Maryanne McGuire  
Lisa and Gregory Meier  
Tyler and John Minton  
Layne and Paul Missigman  
Caroline Molins  
Karen and Anthony Monteleone  
Kyle Moore  
Ultima and John Morgan  
Scott and Linda Nelson  
Jody North  
Matthew and Julie O'Kane  
Lisa Oliveras  
Kelly and Hector Ordoñez  
Elizabeth Oros  
Andrew and Sonni Orosz  
Michelle and Richard Palmano  
Matthew and Leslie Pineda  
Ryan and Amy Plank  
Zeynep and Thomas Portway  
Donald Remigio  
Elsa Reyes  
Sonia and David Reyes  
Cynthia Reynolds  
Tana Riddell  
Kimberlee and Timothy Riley  
Arlene Roque  
Randall and Christine Scott  
Dawn Sheaffer  
Theresa Simon  
Kathleen Sommers  
Eduvigis Soto

Vincent and Lindsay Stazzone  
Tony and Cati Stedman  
Sally and James Studlo  
P.J. and Wendy Sutch  
Marta and John Sweeney  
Valerie and Egbert Swets  
Cliff and Lucille Taylor  
Al Teebagy  
Steve and Jill Thagard  
Clayton and Molly Thompson  
Robert and Wendy Thomson  
Loretta and Timothy Tolland  
Loly Thomas-Chubbs  
Morgan Toney  
Father Matt Mello, V.F.  
Rev. Ivan Olmo, V.F.  
Rev. Richard W. Trout, V.F.  
Joan and L.J. Van Lancker  
Carmen Vicente  
Andrew and Madelyn Weed  
Cathy and James Weite  
Patricia and Thomas Welter  
Erin Whetmore  
Charlotte and George White  
Erika and Arve Wikstrom  
Bill and Donnette Winters  
Jim and Patty Wolfe  
Gregg and Teresita Wright  
Paula and John Yamakaitis  
Rachel and Brian Youngs



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learn more.



# GRANTS

Marian Essay Contest

Professional Development – ICSC

Event Sponsorship Grants

# COMMUNITY SUPPORT

Priest Convocation

National Philanthropy Day

Festival of Trees

Don Quijote Awards



Scan the  
QR code to  
learn more.



National Philanthropy Day



Trinity Catholic H.S. Jeans & Jerseys



Bishop Moore Catholic Gala 2024



Don Quijote Awards

Supporting, celebrating the **devotion**, and **dedication** of our priests.



**2024 Priests' Convocation**

Funded through The Catholic Foundation of Central Florida Endowment Fund



# 2024 Event Sponsorship Grants

**Spring/Summer Season**    \$8,800

**Fall/Winter Season**

**\$13,850**

**Taste of the Villages**  
Catholic Charities of Central Florida

**61<sup>st</sup> Annual Fashion Show,  
A Runway for Giving**  
Morning Star Catholic School

**Mardi Gras**  
St. Mary Catholic Church

**Annual Auction & Gala**  
St. Mary Magdalen Catholic School

**30 Year Anniversary Gala**  
Holy Redeemer Catholic School

**70th Anniversary Celebration**  
All Souls Catholic School

**Handbag Bingo**  
St. Thomas Aquinas Catholic School

**Green and Gold Gala**  
Melbourne Central Catholic High School

**OCA Donor Appreciation Dinner**  
St. John the Evangelist Catholic Church

**Friends of San Pedro Gala**  
San Pedro Development Center

**Renaissance XLI**  
Santa Fe Catholic High School

**Soup Bowl Supper**  
Catholic Charities'  
Pathways to Care

**Harvest Ball**  
Magnify of Central Florida

**International Festival**  
St. Peter Catholic Church

**12<sup>th</sup> Annual Fall Festival**  
St. Mary Catholic School

**14<sup>th</sup> Annual Links for  
Health Golf Tournament**  
St. Thomas Aquinas  
Free Medical Clinic

**MPB Family Golf Tournament**  
Most Precious Blood  
Catholic Church

**International Family Festival**  
Basilica of St. Paul

**Coastal Tide Annual Gala**  
Our Lady of Lourdes Catholic School,  
Melbourne

**Yee Haw Ministry Event**  
St. Stephen Catholic Church

**Mustang Stampede 2024**  
St. Mary Magdalen Catholic Church

**Legacy Gala**  
Bishop Moore Catholic High School

**Celebrate 2024**  
Father Lopez Catholic High School

**Trivia Night**  
Good Shepherd Catholic School

**Courtyard Christmas**  
Blessed Trinity Angels in Arms Early  
Learning Center

**Christmas Madrigal Dinner Gala**  
Blessed Sacrament Catholic Church

**Christmas Celebration!**  
San Pedro Spiritual  
Development Center

**100<sup>th</sup> Anniversary Gala**  
Basilica School of St. Paul

**Jeans and Jerseys**  
Trinity Catholic High School

**A Runway for Giving**  
Morning Star Catholic School

**Taste of Grace Heritage Festival**  
Our Lady of Grace Catholic Church



## Congratulations to the 2024 ICSC Scholarship Grant Recipients

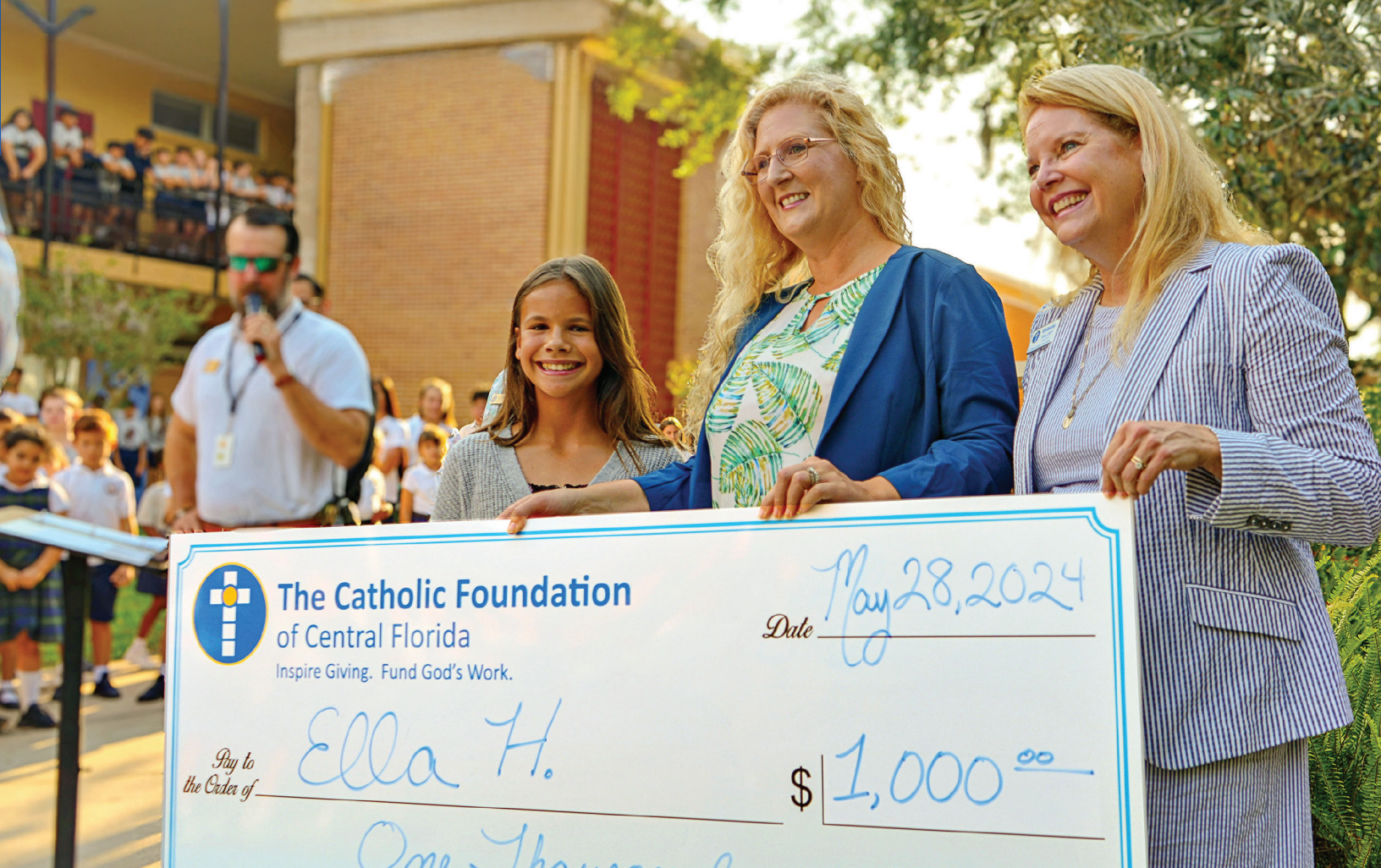
**Fr. John Giel, Pastor**  
Divine Mercy Catholic Church

**Charlotte Funston, Principal**  
St. Peter Catholic School

**Jason Halstead, Parish Staff**  
Blessed Trinity Brother's Keeper

**Clair Huff, Lay Finance/Stewardship Council**  
Our Lady of Grace Catholic Church





# Marian Essay Contest 2024



Scan to learn  
more about  
Marian Essay  
Contest

**258 faith-filled entries** were submitted from middle school students expressing their thoughts on how we can bring Jesus to others, like Mary.

## Overall 1<sup>st</sup> Place:

Ella H.  
St. Mary Magdalen Catholic School

## Top 7<sup>th</sup>/8<sup>th</sup> Grade Entry:

Sterling C.  
Holy Family Catholic School

## Top 5<sup>th</sup>/6<sup>th</sup> Grade Entry:

Katherine S.  
St. Peter Catholic School

## Honorable Mentions:

**Samuel D.**  
Ascension  
Catholic School

**Jason F.**  
Annunciation  
Catholic Academy

**Elena L.**  
Resurrection  
Catholic School

**Keira M.**  
St. Paul Catholic School

**Addi M.**  
Resurrection  
Catholic School

**Maggie M.**  
Sacred Heart  
Catholic School

**Isabelle S.**  
St. Peter Catholic School

**Jacob S.**  
Ascension  
Catholic School

**Cat S.**  
St. James Cathedral  
School

**Cathy Z.**  
Resurrection  
Catholic School



## Your Legacy Can Make a Lasting Difference.

### New Vivos Christi Society Members

Anonymous (3)	✚ Margaret Dunleavy	Gabe Paone
✚ Norm Anderson	✚ Patrick Flannery	Mark A. Peoples
✚ Mary Madelyn Anderson	Thomas Hackim	✚ James Arthur Purcell
Patricia Anthony	✚ Gloria Heisler	✚ James Owen Recor
✚ Mae Mary Baker	✚ Big John	Tim and Kimberlee Riley
✚ Fr. Felicit BayBay	✚ Michael Juliano	✚ Mary Elizabeth Sands
✚ Rev. Clyde Bonar	✚ Paolo and Bernadine Lanzano	✚ Christopher Kemp Scherer
✚ Donald and Laurette Bryan	✚ Patricia Lobdell	Dawn Sheaffer
✚ Francis Cardone	✚ Genevieve Mauch	Lisa Stasik
✚ Angela Norma Cintron	✚ Judith Morris	John and Marta Sweeney
✚ Cook Family Charitable Trust	✚ Fr. John Murray	Mr. and Mrs. Clayton Thompson
✚ Fr. Sean Cooney	✚ Roland Nadeau	✚ Beverlee Ritter Lutz Urban
✚ Edward and Margaret Crowley	✚ Annemarie O'Brien	✚ John White
	✚ Edith Palmer	✚ Anne T. Wurtz

(✚ May God grant eternal rest to the members who have been called home to the Lord.)

“Store up treasures in heaven, where neither moth nor decay destroy, nor thieves break in and steal.

For where your treasure is, there also will your heart be.”

- Matthew 6:19-21



Scan to learn more about Legacy Gifts

## Matured Gift Beneficiaries

- Bishop's Charity Fund
- Catholic Campus Ministry
- Catholic Charities of Central Florida
- Church of the Epiphany
- Our Lady of Lourdes Catholic Church, Daytona Beach
- Priest's Retirement Fund
- Prince of Peace Catholic Church
- Queen of Peace Catholic Church
- St. Brendan Catholic Church
- St. James Catholic Cathedral
- St. John the Evangelist Catholic Church
- St. Joseph Catholic Church, Orlando
- St. Margaret Mary Catholic Church
- St. Stephen Catholic Church
- St. Theresa Catholic Church
- St. Timothy Catholic Church

### Stats

#### FreeWill Gifts

Total New Bequests	10
Total Estimated Future Value	\$1,994,000

#### FreeWill Legacy Commitments Over Time

Total Bequests	56
Total Estimated Future Value	\$5,135,600

#### Other Stats:

Total Page Views Over Time	2,876
Total Estate Plans Created Over Time	111

### Planned Giving

**New Vivos Christi Society Members**

43

**Legacy Gifts Received**

\$4,537,804

**# Matured Legacy Gifts**

56

**New Legacy Gift Commitments**

\$2,574,419

**Total # Vivos Christi Society Members**

1,432



# Legacy Seminars:

Held in FY 2024

St. Patrick Catholic Church

Holy Spirit Catholic Church

Our Lady of Lourdes Catholic Church

Annunciation Catholic Church

St. Matthew Catholic Church



Scan to view the  
Legacy Planning Seminar



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

Secure Your Future at  
*Wine & Wills*  
August 28th





WHAT IS YOUR  
earliest memory  
OF GIVING?  
...AND HOW DOES IT MAKE YOU FEEL?



# Planned Giving Advisory Council

## Members

### Aaron J. Bert, CFP, AIF, CAP\*

Annunciation  
Financial Advisor,  
Certified Financial Group

### Joshua Black

St. Margaret Mary  
Life Insurance Sales Executive,  
HUB International Florida

### Brendan S. Burke, CIMA®, CRPC™

Annunciation  
Senior Vice President,  
Private Wealth Manager  
Merrill Lynch The Burke Cox Group

### Garrett M. Burke CPWA®, CFP®, CPFA\*

Past Council Chair  
St. Mary Magdalen  
Senior Vice President,  
Private Wealth Manager  
Merrill Lynch The Burke Cox Group

### Darrell DeVaney, CFP, CAP®

Council Chair  
St. Margaret Mary  
Founder & Chief Wealth Architect  
55 North Private Wealth

### Colleen M. Duris, B.C.S.

Blessed Trinity, Ocala  
Attorney (Board Certified Specialist  
in Elder Law & VA Accredited)  
Colleen M. Duris, PA

### James Faubert, AAMS

St. Joseph, Winter Haven  
Financial Advisor,  
Edward Jones

### Christopher Garcia, CFP, MBA\*

St. Stephen  
Private Client Advisor,  
Charles Schwab

### Susan Rae Giacoletto, JD

Our Lady of the Lakes  
Attorney at Law  
Susan Giacoletto Law, LLC

### Juan Grau, CPA

St. Margaret Mary  
Private Wealth Manager  
Creative Planning

### Kathleen Hagerty, CAP\*

St. Margaret Mary  
Executive Director,  
Major & Planned Gifts  
Nemours Children's Health

### Jaclyn Hall

St. Brendan  
Financial Advisor  
Primerica Financial Services

### Amber Jade Johnson, JD

St. James Cathedral  
Attorney at Law  
Law offices of Amber Jade Johnson,  
PA

### Alyson Kendust, JD

Ascension in Melbourne  
Attorney  
Lowndes, Drosdick, Doster,  
Kantor & Reed, P.A.

### Gary R. LoDuca CFP®, ChFC, AIF®

Immaculate Conception  
Founder & Owner  
Thoughtful Advisors

### Sherry A. Madl

Our Lady of the Lakes  
Financial Advisor  
Edward Jones

### Wendy Mara, JD, MBA, CAP®

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

### Ty McCormack, CFP, AIF, CAP\*

Council Vice-Chair  
St. James Cathedral  
Wealth Advisor Aksala  
Wealth Advisor

### Gregory Meier, JD, CAP®

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

### Becca Noonan

St. Brendan  
Financial Representative  
Primerica Financial Services

### Matthew O'Kane, JD

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

### Elizabeth Oros

Holy Name of Jesus  
Financial Advisor  
Edward Jones

### Matthew Pineda

St. Margaret Mary  
Attorney/Member  
Pineda Law, PLLC

### Anthony Pinizzotto, P.A.

Our Lady of Hope  
Attorney/Owner  
Law Office of Anthony Pinizzotto

### Ryan Plank, CFP, CPFA\*

St. Margaret Mary  
First Vice President,  
Financial Advisor  
RBC Wealth Management

### Vanessa Skinner, JD

St. Stephen  
Shareholder  
Winderweede, Haines, Ward &  
Woodman, PA

### Johnny Svajko, CPA

Church of the Epiphany  
Certified Public Accountant  
Olivari & Associates CPAs &  
Consultants

### Steve Thagard, MBA, CLU, ChFC, REBC, CFP, CAP\*

St. Margaret Mary  
Wealth Management Advisor  
Northwest Mutual

### Robert Thomson, CPA, PFS, AIF, MBA, CAP\*

Past Council Chair  
St. James Cathedral  
President & Chief Investment Officer  
Trivergent Trust Company

### Paula Yamakaitis

Our Saviour  
CFO/Sr. VP Real Estate  
Selfhelp Community Services



Scan here to learn  
more about PGAC

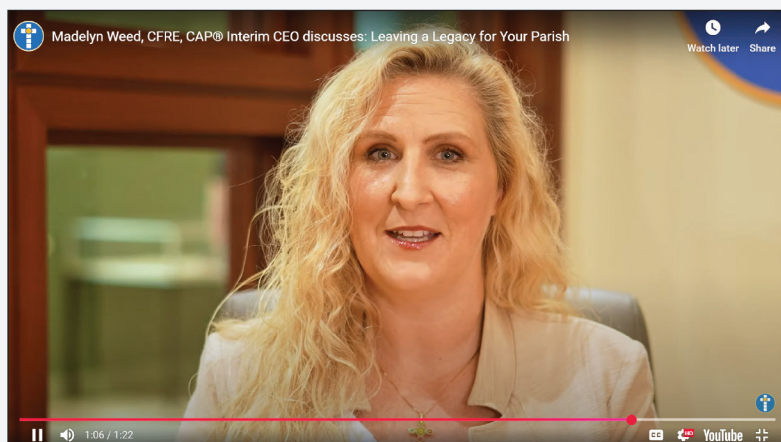
\*=Founding Member



Sarah Pinto, CFRE, CAP® Director of Philanthropy discusses:  
The Benefits of Working with a CAP®



Madelyn Weed, CFRE, CAP® President and CEO discusses:  
Leaving a Legacy for Your Parish



Scan here to view  
Philanthropy Moment  
Video Playlist



Scan to visit  
Philanthropy  
Moment  
online



## CAP program

2024 Graduates



**Sarah Pinto**

*Director of Philanthropy*  
The Catholic Foundation



**Leigh Svajko**

*President*  
Father Lopez Catholic High School



Scan here to learn  
more about CAP®



# Our Catholic Appeal



OCA Overall Stats

2024 Appeal Goal:

**\$17,200,000**

Total Pledged (as of 12/31/24):

**\$18,848,067**

% to Goal:

**109.58%**

Total Donors:

**33,034**

At 90% or More of Goal:

**71 Parishes**

Of these met or exceeded goal:

**52 Parishes**

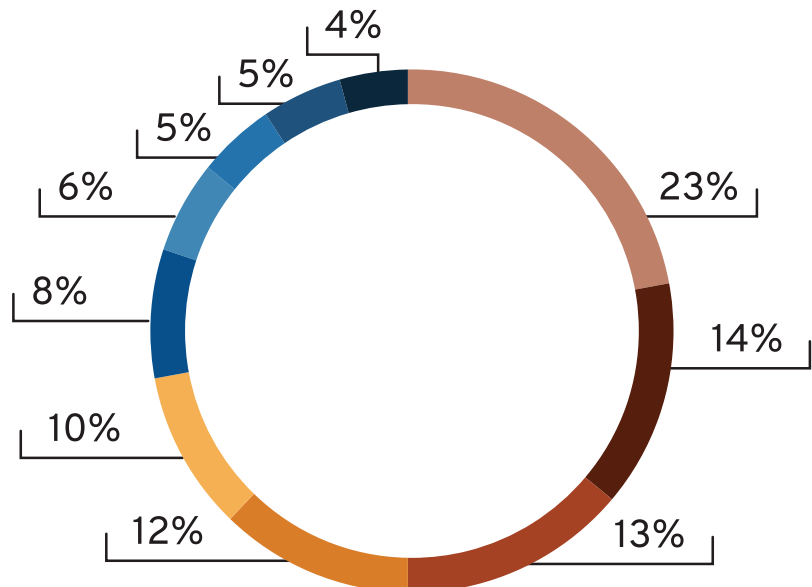
Total Collected:

**\$18,135,511.19**

% of pledges collected:

**96%**

## Allocations for 2024 Campaign



Your gift supports every parish, ministry, and school in the Diocese of Orlando.

### Leadership & Parish Life – 23%

Vocations & Seminarian Education, Clergy Formation, Permanent Diaconate, Bishop's Office, Liturgy, Liturgical Music, Consecrated Life, Tribunal, Ministry to Senior Priests, Ministry to International Priests, Tourism Ministry, Victim Assistance, and Safe Environment Certification

### Discipleship & Stewardship – 14%

Parish, School & Diocesan Development and Advancement Services

### Human Dignity & Solidarity – 13%

Catholic Charities of Central Florida, Culture of Life, and Magnify of Central Florida

### Education – 12%

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

### Ecclesiastical Property – 10%

Cemeteries, Design & Construction, Facilities Management, Real Estate, Security, and Printing & Distribution

### Laity, Family & Life – 8%

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

### Financial Services – 6%

Finance, Information Technology, Parish Shared Accounting Services, and Risk Management

### Human Resources – 5%

Human Resources

### State & National Outreach – 5%

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

### Communications – 4%

Communications, Florida Catholic Media, and Archivist

# Corpus Christi Society



## Corpus Christi Society "Body of Christ"

\$10,000 + annual gift  
183 Members



## Spes Christi Society "Hope of Christ"

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



## Lumen Christi Society "Light of Christ"

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



## Fidelis Society "The Faithful"

Any size gift for 5 consecutive years  
16,299 Members

### 2024 Corpus Christi Society Members

Allan and Judith Allicock	Ron and Paula Davoli	Glenn and Lisa King	Eduardo and Sheila Rabel
Russel and Amy Allinson	Frank and Angela DeLuca	Joseph and Mary Konst	Patrick and Louise Rainey
David and Kathleen Allison	Miss Mary Demetree	Mr. Mark Kornovich	Jose and Pearl Ramirez
Andrew P. Caneza	Dave and Lynda Dennis	Robert and Judy Kryger	Paul and Marilyn Rathbun
Family Foundation	Ronald and Anne Domescek	Chip and Ann Landon	James and Jennifer Rawlings
Joseph and Rebecca Ares	John and Deborah Donohue	Charles and Heidi Lee	Joseph and Madelyn Reali
Gabriel and Jessica Auffant	James and Deborah Doyle	Anthony and Grace Liberty	Daniel and Jill Renuart
Andrew and Phyllis Ayoob	John and Gemma D'Souza	Mr. Jim Liefort	Melvin and Terri Riecher
Selim and Huguette Ayoub	Miss Kathleen Dulko	Robert and Christina Light	Philip and Dani Rogero
Ms. Joyce M. Bagwell	Mr. Gerard W. Egel	Mrs. Dorothy Linguadoca	Steve and Susan Rosbury
Ms. Jane Bailey	John and Christine Elnitsky	Ross and Ramona Lippert	Phillip and Lina Ruhlman
Mrs. Diana Ballard	Miss Cathy Engelman	Michael and Hollice Looney	Ms. Janice Salerno
Michael Barry and Patricia Bartlett	Michael and Fredrika Erdman	Brian and Janet Lower	Joe and Penny Savona
Timothy and Anita Behler	Ernest and Tina Euler	James and Monica Makransky	Thomas and Kathy Scanlon
Albert and Mary Bergeron	Orlando and Carolyn Evora	Mr. Thomas J. McCartney	Peter and Teresa Schaefer
Joe and Carol Bert	Gavin and Annette Ford	Reverend John E McCracken	John and Helen Schaffer
Mrs. Gilma Betancourt	Edward and Karen Gallagher	Randy Means and Carol Brinati	Scott and Kimberly Schmitt
Michael and Melissa Bianculli	Miss Shirley Geitner	Miss Linda Meixsell	Lee and Mariann Schmudde
George and †Lynne Blackwood	Mike and Pam Gilardi	Trevor and Lisa Meyer	Richard and Janet Skipper
Mr. Bruce Bogoslavsky	James and Carolyn Giuliano	Joseph and Lisa Mirante	Miss Elizabeth Smith
Nathan and Anna Bond	Denis and Mary Grant	Robert and Eleanor Monell	Stephen and Cindy Strube
Frank and Linda Bonnewitz	Leida Haddock and Robert Wright	John and Ultima Morgan	Steven and Jill Thagard
Kevin and Jennie Bowler	Tony and Laurie Hemgesberg	Mr. Thomas J. Myers	Thomas and Kristen Tight
Eric and Cherie Brinkman	Ron and Celeste Henkelman	James and Mary Nealy	Miss Ann Marie Turner
Mrs. Mary Brock	Eric and Diane Holm	Ms. Patricia Neidhardt	Mr. David Uhlar
Michael and Jetnareth Broom	Donald and Jane Holzemer	Dr. Michael A. Nocero, Jr.	Mr. Julio Valbuena
Mrs. Mary Pat Burke	Allan and Caroline Honculada	Francisco and Gloria Noda	Keith and Donna Van Allen
Garrett and Amanda Burke	Richard and Josephine Irumudomon	Kieran and Maria O'Connor	Dave and Ann Vogelpohl
Jim and Lisa Burrell	Manuel and Laura Jain	Kevin and Mary O'Donnell	Stephen and Erin Wallace
James and Carrie Busbee	James T. Barnes	Gerry Ogier	Thomas and Barbara Warwick
Robert and Nancy Cabana	Charitable Gift Fund	Mark and Robin Ogier	Mr. Bob Watson
Edmund and Susan Cain	James and Merry Jochum	Mr. George O'Neill, Jr.	Robert and Mary Wells
Mario and Mary Canova	Stephen and Marva Johnson	Miss Miriam Ormsby	Paul and Dorothy Wewe
Mr. Larry Carroll	Mrs. Barbara Josephs	Bill and Jody Orosz	Steve and Kathy Whitney
Tom and Peggy Chandler	Ms. Marilyn Juricic	Louis and Paulette Paradiso	Alfred and Patricia Wyborski
Patrick and O'Ann Christiansen	Samuel and Constance Kaleel	Raul and Johanna Paredes	Andrew and Kelly Yurasko
William and Patricia Christie	Allan and Linda Keen	Mr. Albert J. Perry	Steve and Lori Zepf
Mrs. Suzanne Cooley	Mark and Cindy Keenan	Frank and Lisa Porter	Robert and Renda Zielke
Peter and Deborah Costello	Timothy and Kathleen Kiley	Mrs. Selby Prince	Victor and Jaquelynn Zollo
Estefano and Norma Crisafi	Chris and Lisa Killer	Terry and Jeanne Quigley	Anonymous (25)
Gary and Donna Cupal			

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

# Offertory Programs

Supporting God’s Works in Our Parishes

YOY Total Offertory Average Increase	Total Online Giving Donations from Offerings	YOY Total Average Increase of Online Giving Donations	YOY Total Average Increase of Online Giving Donors
15%	36%	36%	36%

Total YOY Offertory Increase since the inception of the program (est. 2012)			
\$11M			
Total Participation: 73	Parishes: 64	Missions: 9	80% of Diocesan Parishes and Missions

Total funds Collected from Sept. 2023-Nov. 2024
\$5.47M







Our team supports parishes by implementing three spiritually enriching offertory programs. These programs aim to secure the resources necessary to sustain and grow God’s work while helping the faithful reconnect with their parish mission and experience the joy of generosity. In thanksgiving, returning a portion of our blessings for all God has given us.

*“Enter his gates with thanksgiving, his courts with praise. Give thanks to him, bless his name; good indeed is the LORD, His mercy endures forever”*  
*(Psalm 100:4-5).*

After Bishop John Noonan installed Father Benjamin Lehnertz as the new pastor of St. Joseph Catholic Church in Orlando on February 5, 2023, the parish conducted the offertory enhancement initiative and online giving campaign from September 2023 to August 2024. Offertory donations increased by 45%, marking the most significant rise among parishes in the Diocese of Orlando for fiscal year 2024, with more than half of all offerings coming from online donations. The pastor’s engagement during the active and continuation phases considerably impacted and delivered as promised. This effort helps them continue serving Christ’s mission and addressing the needs of their community.

Parishes that conducted the offertory enhancement initiative and/or online giving campaign this fiscal year:

 <b>Holy Name of Jesus</b> Indialantic Very Rev. Scott Circe	 <b>Our Lady of Lourdes</b> Daytona Beach Rev. Philip Egitto	 <b>Our Lady of Hope</b> Roman Catholic Church <b>Our Lady of Hope</b> Orange City Very Rev. Matthew Mello	 <b>Our Lady of Lourdes</b> Melbourne Rev. Thomas Walden	 <b>St. Joseph,</b> Orlando Rev. Benjamin Lehnertz
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# Capital Improvements Through Capital Campaigns

Capital campaigns focus on larger-scale projects that exceed regular operating budgets. By collaborating with the staff of the parish or diocesan entity, we can identify key factors that contribute to the campaign's success and engage the faithful in addressing essential facility and ministry needs. Our services include conducting feasibility studies and strategic planning to assess capacity and develop a clear, transparent case for support. This process continues with the launch and pledge redemption, ensuring that funds are raised.

Parishes conducting capital campaigns are actively working with our team on consistent communication and pledge redemption efforts to help reach the goal needed to fund their capital projects.

## Ascension Catholic Community



**Campaign Goal**  
**\$2.5 million**

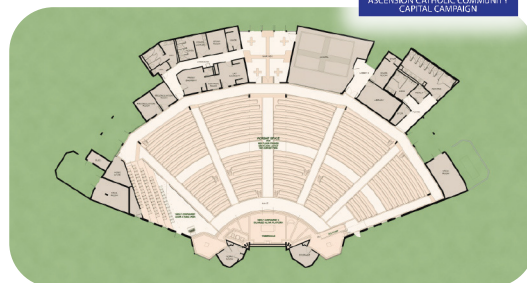
**Pledged**  
**\$2.3 million**

**% to Goal**  
**92%**

**# of Donors**  
**468**



The sanctuary of Ascension Catholic Community has not had any major renovations since its construction in 1987. The Renew the House of the Lord Capital Campaign raises funds for several projects to create a safe and beautiful space for worship and to offer the Lord the praise He is due.



## Nativity Catholic Church



**Campaign Goal**  
**\$3.2 million**

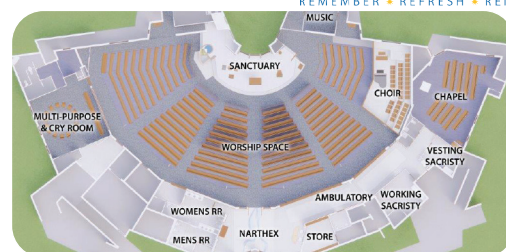
**Pledged**  
**\$2.5 million**

**% to Goal**  
**78%**

**# of Donors**  
**286**



Since the 1996 expansion of Nativity Catholic Church, the interiors have had little work. The church building needs renovations to remain a welcoming space for future generations. The Legacy Continues Capital Campaign aims to raise funds for these essential updates allowing the parish to continue to be "A Welcoming Community of Believers."



## St. John the Evangelist Catholic Church



**Campaign Goal**  
**\$3.2 million**

**Pledged**  
**\$3.9 million**

**% to Goal**  
**122%**

**# of Donors**  
**768**



St. John the Evangelist Catholic Church garnered strong support for its capital project. God's Heart...Our Dream - 2.0 Capital Campaign aimed to fund the construction of a new Grotto of Our Lady of Lourdes and a surrounding garden featuring 14 Stations of the Cross. This development serves as a compelling attraction, encouraging people to spend time in prayer, particularly through the Rosary.





# Foundation Board and Team

## Board

- Karen Monteleone – **Chair**  
Robert Kryger – **Vice Chair/Treasurer**  
Elisha González  
Lori Tolland  
Rachel Youngs  
Garrett Burke

Matthew Pineda  
Wendy Mara, J.D., MBA, CAP®  
David R. Ramos  
Randall Scott  
Andrew Orosz  
Jessica Bracero

Very Reverend Ivan Olmo  
Very Reverend Scott Circe  
Very Reverend Timothy LaBo  
Very Reverend Ralph DuWell  
Very Reverend Matthew Mello  
Very Reverend Richard Trout



## Team

From Left



- Michelle Adams  
Natalia Bakurova  
Rosie Camous  
Susan Diaz  
Jose Sola

Jeannette Eddy  
Lisa Oliveras  
Nia Herald  
Bryce Howard  
Susan Hunt

Riley Kimberlee  
Clara Melo De Paula  
Thien Nguyen  
Ari Picos  
Sarah Pinto

- Doris Quinones  
Marco Robles  
Marta Sweeney  
Elle Voorhees  
Madelyn Weed



# Honors and Awards



## Marta Sweeney's Retirement

After 32 years of service to the Catholic Church in Central Florida, Marta Sweeney, The Catholic Foundation's VP-Chief Community Services Officer, entered her well-deserved retirement. Marta is an active parishioner at Most Precious Blood Catholic Church. She served as a Board Member of the International Catholic Stewardship Council for which she will continue to volunteer. She is also a founding member of the Women's Philanthropic Giving Circle.

Marta led vital projects in the Diocese of Orlando including Our Catholic Appeal, Capital Campaigns and a variety of stewardship initiatives. These projects directly benefit every Catholic parish, school, and ministry in Central Florida. The diocese recognized Marta for her contributions with the Mary Mother of God Award. This honor celebrates those who show exceptional service and deep faith.

Marta's retirement on All Saints Day is especially meaningful as we honor those who have selflessly served the Church. Like the saints, who inspire us through their service, Marta's dedication to these vital projects will continue to inspire us. We would like to extend our deepest gratitude to Marta for her 32 years of service. May her retirement be filled with joy, peace, and the blessings she deserves.



## ICSC Awards 2024

- 🏆 Total Foundation Efforts
- 🏆 Diocesan Stewardship Efforts
- 🏆 Total Annual Appeal Efforts
- 🏆 Annual Appeal Brochure
- 🏆 Total Planned Giving Efforts (Honorable Mention)
- 🏆 Annual Appeal Poster (Honorable Mention)



Scan to learn  
more about  
ICSC Awards



Platinum  
Transparency  
2025

**Candid.**



# Financial Statements

## Statements of Financial Position

June 30,

2024

2023

### ASSETS

Cash and cash equivalents	\$3,018,989	\$1,851,741
Investments	11,922,890	9,222,088
Investments restricted for long-term purposes	17,067,222	15,371,295
Agency funds held	85,362,658	71,425,311
Other assets	780,827	636,934
<b>Total Assets</b>	<b>\$118,152,586</b>	<b>\$98,507,369</b>

### LIABILITIES

Accounts payable and accrued expenses	\$1,075,628	\$417,848
Agency obligations	85,362,658	71,425,311
Other liabilities	471,193	459,681
Deferred revenue	114,320	129,167
<b>Total Liabilities</b>	<b>87,023,799</b>	<b>72,432,007</b>

### NET ASSETS

Without donor restrictions

Undesignated	717,862	887,950
Designated for donor-advised funds	723,139	583,895
Designated for other purposes	614,661	548,486
<b>Total without donor restrictions</b>	<b>2,055,662</b>	<b>2,020,331</b>

With donor restrictions

29,073,125 24,055,031

**Total net assets 31,128,787 26,075,362**

**Total liabilities and net assets \$118,152,586 \$98,507,369**





## Statements of Activities

— For The Years Ended June 30 —

2024

2023

### PUBLIC SUPPORT & REVENUE & NET ASSETS RELEASED FROM TIME & USE RESTRICTIONS

Development and stewardship service fees	\$2,193,147	\$1,845,491
Investment management service fees	450,613	378,282
Campaign service fees	345,427	254,603
Contributions	2,859,372	1,651,497
Investment income (loss), net	2,919,488	1,955,586
Net assets released from time and use restrictions	-	-
<b>Total public support and revenue and net assets released from time and use restrictions</b>	<b>8,768,047</b>	<b>6,085,459</b>

### EXPENSES

#### Program activities

Community services	1,613,188	1,287,654
Grantmaking and managing charitable funds	752,166	1,075,439
Donor services	663,191	547,794
<b>Total program activities</b>	<b>3,028,545</b>	<b>2,910,887</b>

#### Supporting activities

Management and general	686,077	652,249
<b>Total expenses</b>	<b>3,714,622</b>	<b>3,563,136</b>

<b>CHANGE IN NET ASSETS</b>	<b>5,053,425</b>	<b>2,522,323</b>
<b>NET ASSETS - Beginning of year</b>	<b>26,075,362</b>	<b>23,553,039</b>
<b>NET ASSETS - End of year</b>	<b>\$31,128,787</b>	<b>\$26,075,362</b>



Nia Herald, VP & Chief Financial Officer, CAP® discusses:

## Who is at Your Planning Table?

<https://youtu.be/whJY3A79oMk>

The Catholic Foundation of Central Florida is an independent 501(c)(3) nonprofit community foundation committed to fostering and stewarding philanthropy to meet the spiritual and corporal needs of our community. 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 donors, Catholic parishes, schools and nonprofit organizations aligned with Catholic social values to maximize philanthropy and ensure resources needed to address community needs.



## The Catholic Foundation of Central Florida

Inspire Giving. Fund God's Work.

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