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

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Newsletter

SEPTEMBER 2025

<u>Life Insurance Month: A Simple Policy, A Lasting Legacy</u>

September is Life Insurance Awareness Month, a perfect time to reflect on how the plans we make today can continue to bless the people and places we care about most. Beyond providing security for loved ones, a life insurance policy can also be a beautiful way to support your parish, school, or ministry close to your heart. By designating them as a beneficiary, your faith and generosity can live on, nurturing the Church well into the future.

The Catholic Foundation of Central Florida is here to walk with you in exploring how this simple planning tool can become a lasting act of stewardship. Together, we can help ensure that your legacy continues to strengthen the ministries that inspire and sustain our Catholic community for generations to come.

Madelyn

Madelyn T. Weed, CFRE, CAP®

President & CEO

In This Month's Newsletter:

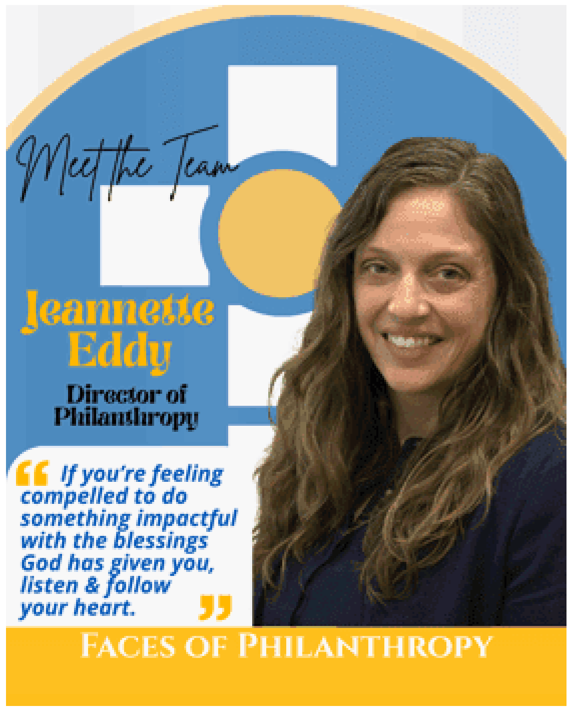
*Market Highlights from Our Trusted Partner the Concord Advisory Group, Ltd: Broken IPO System

*Share Your Thoughts On This Month's Newsletter

Philanthropy Moment: Using Life Insurance to Make Charitable Donations

Jeannette Eddy explains how life insurance can serve as a powerful philanthropic tool to support charities while offering donors meaningful tax benefits and legacy-building opportunities. Click here to watch.

Faces of Philanthropy: Meet CFOCF's Director of Philanthropy Jeannette Eddy



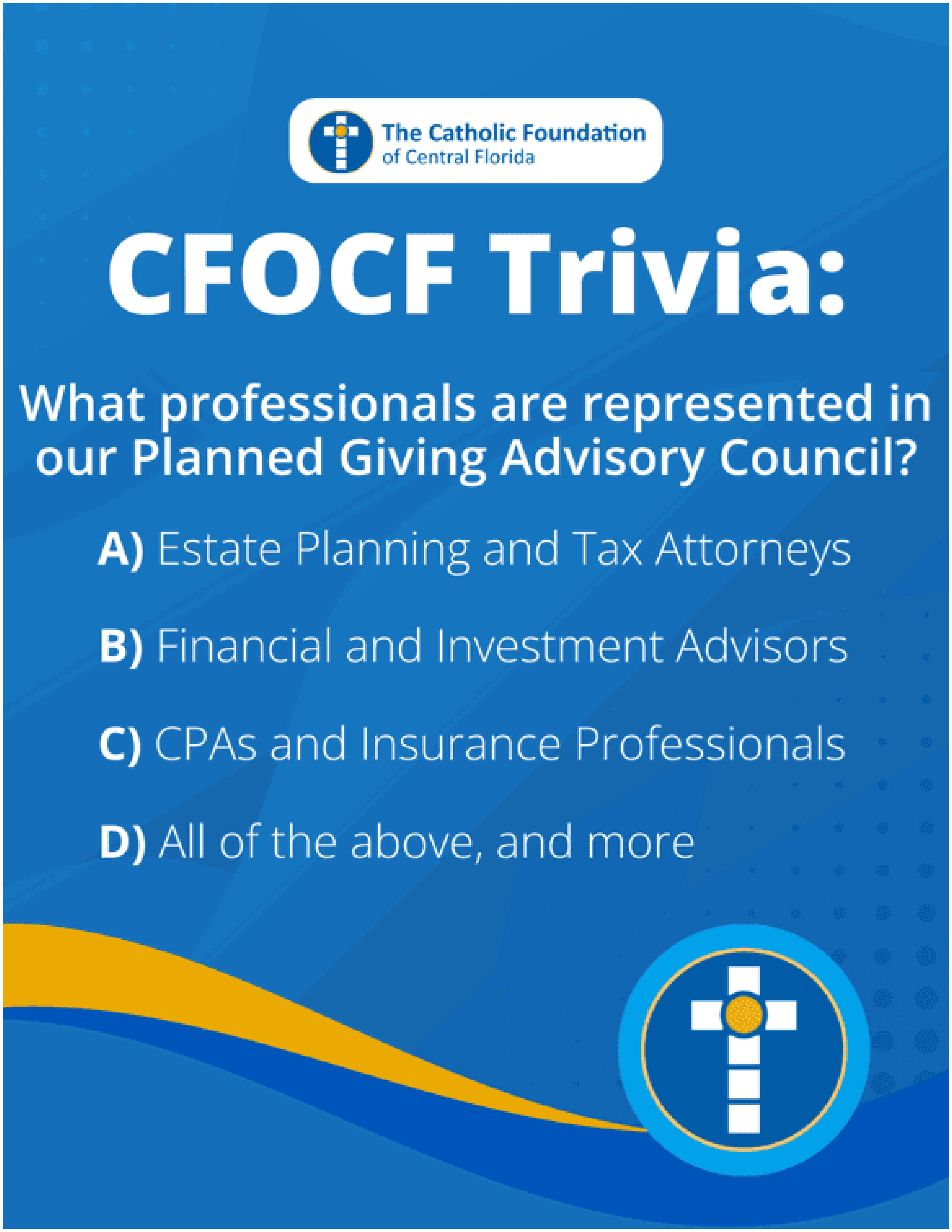
While in Boston, I worked at the WGBH Educational Foundation (Boston's public television and radio station) and helped grow the Planned Giving and Endowment programs for the station. Now, Read more...

Welcome New Planned Giving Advisory Council Member: Cameron White, JD

The motto of Pathways Law, P.A. is “Securing Your Legacy with Thoughtful Estate and Business Planning.” Whether he is assisting with developing an estate plan, or drafting documents for the sale of a business, Cameron works to understand the big picture first before delving Read more...

Dr. Russell James Empowers Advisors with Charitable Planning Strategies

Thank you to local advisors who joined our session with nationally renowned speaker, Dr. Russell James, on charitable financial planning strategies! Our Planned Giving Advisory Council helps make opportunities like this possible. Learn more about the PGAC, and how you can get involved.



D – All of the above, and more

[2nd Annual Wine & Wills Event at Father Lopez H.S.]

Wine & Wills is designed to help parishioners and school communities learn about the importance of estate planning in a relaxed, welcoming setting. We provide Read more...

[The Catholic Foundation Sponsors 2025 Priest Convocation]

Each year, priests from across the Diocese of Orlando gather for the annual Priest Convocation. This is an opportunity for priests to step away from their Read more...

CFOCF Grant Helps Fund Great Need at St. Mary Catholic School

With the generosity of our CFOCF Grantmaking Fund donors and The Board of Directors, The Catholic Foundation was blessed to distribute a greatest needs grant to St. Mary Catholic Church and School in Rockledge. The school was facing an urgent expense of $100,000 for [Read more...]

[Six Finalists Selected for the WPGC Pitch Party]

The WPGC has selected six local nonprofits as finalists for the 2025 grant cycle! Each will have the opportunity to "pitch" their project to members at the annual Pitch Party on Sept. 12. Want to

[WPGC 2024 Grant Impact Update: Find, Feed, Restore]

Find, Feed, Restore, WPGC 2024 Grant Recipient, describes how the funds were used within their organization. See how they are restoring dignity and stability to join the excitement? Contact Jeannette Eddy for details.

local families thanks to a grant from our Giving Circle. Click here to watch.

Market Highlights from Our Trusted Partner The Concord Advisory Group, Ltd.

"Broken IPO System"

August 2025 Market Highlights

Some of the largest companies in the world are choosing to remain private. This choice is having a negative impact on investors. The ownership of the best performing private equity companies is controlled by a small group of investors, often through investments with the top venture capital firms. Investors fortunate enough to own these VC partnerships have enjoyed great returns, but are also paying hefty private fund fees, have limited transparency, low liquidity, and delayed return of capital.

The late-July Figma initial public offering (IPO) shows that Wall Street's investment banking system may be partially to blame for large companies remaining private. Figma's IPO was 40-times oversubscribed at $33 dollar per share, the price where the underwriters' preferred customers bought shares and Figma, its existing shareholders, and private equity owners sold a portion of their equity. Figma opened at $85 in public trading, 257% higher than where the investment bankers priced the IPO. The steep underpricing of Figma's $20 billion IPO calls into question Wall Street's ability to efficiently bring much larger private companies to the public markets

The hesitation of these private companies to go public has negative consequences for both public and private investors. For private investors it delays potential liquidity and extends high management fee payments. For public investors, the hesitation to go public limits broader investor participation in the growth stories of these potentially transformative companies.

There is an ongoing conversation about making private equity available to retail investors, as institutional investors have begun to pull-back. Smaller investors are unlikely to gain access to the top-performing venture capital investment funds. Having smaller investors pay higher fees, assume illiquidity, and lose transparency by investing in second and third-tier private equity funds is not the solution. Instead, Wall Street needs to demonstrate that it can do a better job facilitating the movement of these companies into liquid, transparent, and more accessible public markets.

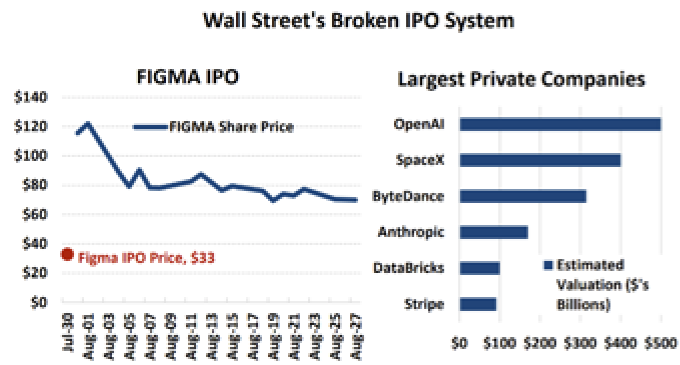


Chart Source: Bloomberg

Concord Advisory Group, Ltd.

Some of the largest companies in the world are choosing to remain private. This choice is having a negative impact on investors. The ownership [Read more...]

[Share Your Thoughts On This Month's Newsletter]

ST. KATHARINE DREXEL SOCIETY

[Learn more about joining the St. Katharine Drexel Society]

St. Katharine Drexel is the patron Saint of Philanthropy. The Catholic Foundation of Central Florida strives to emulate her work by enhancing philanthropic impact which serves those who are most in need in nine counties of Central Florida. here.

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.

Returning God's Gifts

Ways to Give

Leave a Legacy

Make an Impact

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

Stay Connected With Us Everyday!

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

Platinum Transparency 2025

Candid.