

Catholic-Compliant Investing:

Faith-Aligned.
Values-Driven.
Strategically Sound.



What it Means

Catholic compliant investing balances financial returns with Church teachings, avoiding companies linked to abortion, embryonic stem-cell research, contraceptives, weapons of mass destruction, and other moral concerns. Our Investment Policy Statement defines screening policies aligned with the USCCB guidelines and our Catholic values.

Core Principles

1. Screening (Exclude “No Go” Sectors)

Avoid investing in industries that conflict with Church values.

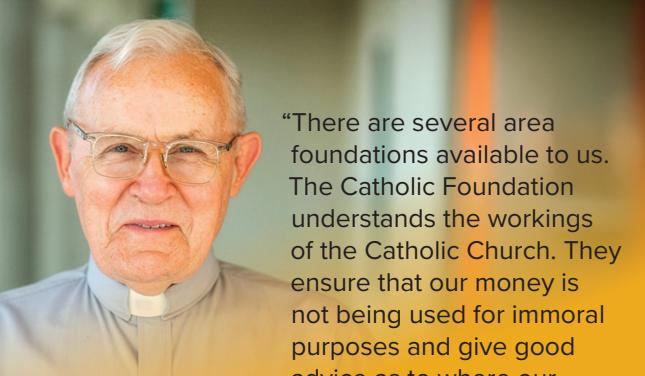
2. Engagement (Influence and Encourage)

Beyond avoiding certain stocks, actively vote proxies and engage companies to shape better policies aligned with Catholic ethics.

3. Values + Performance

Faith-based portfolios can provide competitive returns without sacrificing financial goals.

Implement a strategy that blends financial stability with moral clarity.



“There are several area foundations available to us. The Catholic Foundation understands the workings of the Catholic Church. They ensure that our money is not being used for immoral purposes and give good advice as to where our money should be spent.”

Father Richard Walsh

Why It Matters



Peace of Mind

Confidence in investments that align with your Catholic faith and moral values.



Influence for Good

Shareholder engagement helps build more just, humane, and ethical businesses.



Holistic Stewardship:

Merges financial stewardship with spiritual responsibility echoing Catholic social teaching.

Catholic-compliant investing empowers clients to invest with both faith and prudence ensuring their portfolios honor Church teachings, influence positive corporate behavior, and pursue financial success.

Interested in learning more?

Visit cfocf.org/investmentservices for more information on how the Everlasting Fund, Harvest Fund and Stewardship Fund portfolio is tailored to your values and goals or contact Nia Herald, VP & CFO, CAP® (407) 246-7189 or email nherald@cfocf.org.

Open Your Catholic Fund Today

Learn more at
cfocf.org/investmentservices
or contact one of our
Charitable Giving Advisors.



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Your gift can grow
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The Catholic Foundation
of Central Florida
Inspire Giving. Fund God's Work.

CatholicFoundation@cfocf.org
(407) 246-4889

Seeds of Faith Funds



**Giving in Faith.
Growing in Impact.**

Through The Catholic Foundation of Central Florida, you can choose from three meaningful giving options that reflect your values and vision. Each fund empowers you to support the Church in a way that aligns with your spiritual journey today, tomorrow, and for generations to come.

Stewardship Fund

Donor Advised Fund

Guided Giving, Rooted in Faith

Actively support the causes closest to your heart by recommending grants to Catholic-compliant organizations over time. This flexible option lets you organize your stewardship and stay engaged in charitable giving while growing your impact through invested assets.

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

– 1 Peter 4:10



Harvest Fund

Short-Term Invested Fund

Give Today. Bear Fruit Tomorrow.

Ideal for donors who want to see timely impact while still benefiting from investment growth. Distributions are made after a certain number of years, supporting ministries and needs as they arise.

“Let us not grow tired of doing good, for in due time we shall reap our harvest.”

– Galatians 6:9

Everlasting Fund

Endowment Fund

Establish a Legacy That Never Ends

Your gift is invested permanently, with the earnings used to support your designated ministries each year. It's a powerful way to ensure your faith and values live on through generations.

“Whoever sows sparingly will also reap sparingly, and whoever sows bountifully will also reap bountifully.”

– 2 Corinthians 9:6



Every Gift, A Testament of Faith

Whether you choose to give now or later, temporarily or forever, your generosity builds the Kingdom of God – one seed, one harvest, one legacy at a time.

Contact one of our Charitable Giving Advisors today to start your fund and experience the joy of watching your dollars grow as it transforms lives and creates lasting impact on the ministry you love.

