

2025 IMPACT REPORT



*Stewardship
that Endures*



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



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



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



*But grow in grace
and in the knowledge of our Lord and savior Jesus Christ.
To him be glory now and to the day of eternity. Amen.*

(2 Peter 3:18)

My Sisters and Brothers in Christ,

Grace and Peace of our Lord Jesus Christ be with you! I pray with gratitude for you are God's faithful stewards, succumbing to His will to flourish His creation over all the earth. Today, you receive this Catholic Foundation of Central Florida Impact Report. This Impact Report is our report to God; offering our ideas about how our service of investment impacts the mission of the Catholic Church, to spread the Good News to all the people.

Its pages are filled with God's goodness abounding within the Diocese of Orlando for it tells the story of serving generously, as God calls us to grow in grace. It is an historical document, as it proclaims our participation in salvation history. It reflects upon the many ways in which we are His stewards, 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 and give Him glory.

What is the measure of our impact? As we offer ourselves through, with and in the Eucharist, we pray all our moments will imbue the earth with holiness. We pray its measure will yield heaven.

Sincerely yours in Christ,

Most Reverend John Noonan
Bishop of Orlando

Stewardship that Endures: Faith in Action Across Central Florida

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

As we enter a new chapter in our shared mission, we are reminded that Catholic Stewardship is not only about what we give, but also about how we live. Rooted in gratitude and guided by the Holy Spirit, The Catholic Foundation of Central Florida continues to serve as a bridge between faith and action, generosity and transformation. This year's Impact Report celebrates the countless ways your stewardship of time, talent, and treasure has strengthened the parishes, schools, and ministries across the Diocese of Orlando.

Catholic Stewardship calls each of us to recognize that all we have is a gift from God, entrusted to us for His glory and the good of others. This sacred trust inspires every aspect of our work, from nurturing the next generation of disciples to ensuring long-term financial stability for the Church we love.

The past year has been one of renewed purpose. Together, we've expanded our reach through growing endowments, strategic partnerships, and new initiatives that empower faithful giving. Through your generosity, more families have access to Catholic education, more ministries have sustainable support, and more of our brothers and sisters in Christ are experiencing the hope that flows from living faith in action.

Because of your generosity and trust, **the Foundation established 28 new funds totaling \$6.8 million**, while also **growing existing funds through 650 gifts collectively valued at \$6.2 million**. These blessings, along with strong market growth, have allowed us to **distribute \$4.3 million back into our parishes, schools, and ministries** a remarkable outpouring of support that continues to bear fruit in our community. Through these resources, Catholic schools are more accessible, seminarians and retired priests are supported, and families in need are finding hope and dignity. Together, we are ensuring that the Church's mission of charity and evangelization endures for generations to come.

None of this is possible without you - our donors, pastors, parish partners, and faithful friends, whose prayers, generosity, and trust sustain our mission. Your stewardship is transforming lives and building the Kingdom of God here in Central Florida.

As we look ahead, we remain steadfast in our commitment to be faithful stewards of the resources entrusted to us. With your continued support, we will strengthen our shared mission to bring the light of Christ to every corner of our Diocese.

On behalf of our Board of Directors and Foundation staff, thank you for walking this journey of faith and stewardship with us. May God bless you abundantly for all you do in His name.

Together in Christ,



Karen Monteleone

Karen Monteleone
Board Chair



Madelyn T. Weed

Madelyn Weed, CFRE, CAP
President & CEO

Fiscal Year 2025

Investment Management Impact Stats

Total Assets Under Management

Fund Type	# of Funds	Market Value
Endowment Funds	169	\$98,949,677
Reserve Funds	48	\$36,917,832
Donor Advised Funds	16	\$1,183,142
Charitable Gift Annuities	12	\$483,557

Funds By Areas of Interest (Endowments + Reserves)

Interest	# of Funds	Market Value
Catholic College and University	3	\$2,153,075
Catholic Education	90	\$62,242,242
Church Leadership and Development	6	\$14,279,625
Clerical Life	9	\$9,276,532
Diocese of Orlando Ministries	2	\$1,355,981
Faith Formation	1	\$26,764
Outreach Ministries	12	\$10,451,598
Parish Life	94	\$36,081,692
Donor Advised Funds	16	\$1,183,142

Total Available Distributions

Area of Interest	# of Funds	Distribution
Catholic Campus Ministries	3	\$73,059
Catholic Charities	2	\$161,764
Ministry Support	7	\$501,645
Parish Life	68	\$794,568
Polk County Charity	1	\$49,017
Priest Retirement	2	\$226,389
Scholarship / Tuition Assistance	60	\$1,453,855
Total Distributions:		\$3,260,297

99.8 % - Catholic Compliance Rate

Catholic-Compliant Investing:

Faith-Aligned. Values-Driven. Strategically Sound.

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 “NoGo” 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**.

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.



Learn more about
Investment Services

Impact Stories

St. Joseph Education Endowment Fund

The St. Joseph Education Endowment Fund provides vital tuition assistance for students at St. Joseph Catholic School in Winter Haven, as well as for graduates continuing their education at Santa Fe Catholic High School. In addition, the fund strengthens the school's mission by supporting supplemental operational needs and the religious education programs of St. Joseph Catholic Church. Funds may also be used for capital improvements to enhance educational facilities, equipment, and learning environments across the parish and school campus. Through this enduring endowment, donors invest not only in the present but in a future grounded in truth, knowledge, and the beauty of the Catholic faith.

Trinity Catholic High School Lighting the Path Endowment Fund

In celebration of its 25th anniversary, Trinity Catholic High School established the Lighting the Path: 25 Years of Catholic Education Endowment to honor a legacy that has formed more than 1,710 graduates since 2004 as faith-filled leaders in their communities. With over 96% of the Class of 2025 continuing to higher education and nearly \$1.4 million in scholarships earned, the endowment was launched at a pivotal moment to address growing needs for tuition assistance, program innovation, and spiritual formation. Managed in partnership with The Catholic Foundation, the fund will provide perpetual support for scholarships, campus ministry, service-learning, faculty faith formation, and emerging priorities, ensuring access to Catholic education for deserving students regardless of financial circumstances. This enduring investment strengthens Trinity Catholic's mission and secures the financial and spiritual foundation needed to guide the school's next 25 years and beyond.

Volusia County Catholic Schools Endowment Fund

Established by Father Matthew Mello and other visionary Catholic leaders, the Volusia County Catholic Schools Endowment Fund is building a strong and sustainable future for Catholic education across Volusia County. By providing lasting financial support to local Catholic schools, the endowment ensures that students continue to receive a faith-filled education rooted in academic excellence, spiritual formation, and Gospel values. Proceeds from the Knights of Columbus Council 8086 annual spring fundraiser directly support the growth of this fund, helping make a truly transformational impact on Volusia County Catholic schools.



Scan to learn
more about
Impact Stories



St. Joseph Education Endowment Fund

Helping make Catholic education accessible to families at St. Joseph Catholic School, Winter Haven



Trinity Catholic High School Lighting the Path Endowment Fund



Volusia County Catholic Schools Endowment Fund

Endowment Funds

Catholic College and University

\$2.2 M

✦ = NEW THIS FISCAL YEAR

Catholic Campus Ministry
Endowment Fund (AIC)

Catholic Campus Ministry
Endowment Fund

Bishop Stephen D. Parkes
Endowment for Catholic
Campus Ministry

Catholic Education

\$46.7 M

Adelaida Valdes
Endowment Fund

✦ Divine Mercy
Parish Trust
Endowment Fund

Leonard T. (Pat)
Murphy Scholarship
Endowment

Santa Fe Catholic
High School
Endowment Fund

St. Timothy Catholic
Church Educational
Endowment Fund

The Sylvia Hope
Horrigan Memorial
Scholarship
Endowment

AIC Tuition
Assistance

Elizabeth Buckley
Scholarship Fund

Maria Boudet &
de la Roza Family
Endowment Fund

✦ Shaughnessy-
Mantle Family
Endowment Fund

The Annunciation
Catholic Academy
Endowment and
Charitable Trust

✦ Trinity Catholic
High School Lighting
the Path Endowment
Fund

Andrew P. Caneza
Foundation
Endowment Fund

✦ Faith in Action
Saint Carlo Acutis
Endowment Fund

Marie Nolin
Scholarship
Endowment

Sister Dorothy
Sayers Endowment
Fund

✦ The Bruno Family
Endowment Fund

Tuition Assistance
Scholarship
Endowment Fund

Ann Hefferin
Memorial
Endowment Fund

Fr. Frank Zammit
Endowment Fund

Melbourne Central
Catholic Endowment
Fund

St. Andrew School
Endowment

The Dorothy and
Walter Shelley
Family Scholarship
Endowment Fund

✦ Volusia County
Catholic Schools
Endowment Fund

✦ Bill and Ann
Fraser Memorial
Endowment Fund

Fr. Joseph
Nolan Education
Endowment Fund

Murray Scholarship
Endowment Fund

St. Anthony's
Catholic School
Endowment Fund

The Henry S.
Sitkowski Memorial
Scholarship
Endowment

Xavier Leyva
Quintana Scholarship
Endowment Fund

Bill Dunn Alumni
Scholarship
Endowment Fund

Fr. Sean Heslin
Scholarship
Endowment Fund

Our Lady of Hope
Catholic Education
Endowment Fund

St. Charles Borromeo
Catholic Church and
School Endowment
Fund

The Ian A. Gilmore
Memorial Scholarship
Endowment

The Jillian Elizabeth
Blais Memorial
Scholarship
Endowment Fund

Bud Farmer
Scholarship Fund

Gary Burkey Student-
Athlete Endowment
Fund

Our Lady of Lourdes
(Melbourne) School
Endowment Fund

St. James Cathedral
School Endowment
Fund

The Jillian Elizabeth
Blais Memorial
Scholarship
Endowment Fund

✦ Catholic Lawyers
Guild Endowed
Scholarship Fund

Gentile Scholarship
Endowment Fund

Our Lady of Lourdes
Catholic Church and
School Endowment
Fund

St. John Vianney
Catholic School
Endowment Fund

The Men of Holy
Family School
Endowment Fund

✦ Charles and Janet
Ferrell Scholarship
Endowment Fund

Guardian Angel
Endowment Fund

Raymond H. Giel
Endowment Fund for
St. Paul School

✦ St. Joseph
Education
Endowment Fund

The Michael Scheve
Endowment Fund

Church of Our
Saviour Catholic
School Endowment

Holy Redeemer
Catholic School
Endowment Fund

Resurrection Catholic
School Endowment
Fund

✦ St. Joseph's
Educational
Foundation
Endowment Fund

The Sister Elizabeth
Murphy Tuition
Assistance Fund

Dave Powers
Memorial
Endowment Fund

Joanne C. Brown
Endowment Fund

Richard L. & Rita
C. Lienenbrink
Scholarship
Endowment

St. Margaret Mary
School Teacher
Endowment Fund

The St. Teresa
Catholic School
Endowment Fund

Dawn Michelle
Aberwald Memorial
Endowment Fund

Joe Cadden
Memorial Scholarship
Endowment Fund

Ronald and
Patricia Gendreau
Endowment Fund

St. Peter Catholic
School Angel Fund

Deforest W. and
Margaret Y. Bullard
Scholarship Fund

Joe Skinner Baseball
Endowment Fund

Kelly Reen Memorial
Fund

Church Leadership and Development

\$12.1 M

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

The Catholic Foundation of Central Florida
Endowment Fund

Clerical Life

\$9.2 M

Prince-Olson Family Vocation
Scholarship Endowment Fund

Priests' Retirement Fund

Bishop Dorsey Endowment

Seminarians Fund

Degel Family Endowment
Fund for Seminarians

Emmaus Endowment Fund

Fr. John Giel Endowment Fund
for Incardinated Priest Sabbaticals



Scan to learn
more about
**Endowment
Funds**

Endowment Funds

✦ = NEW THIS FISCAL YEAR

Faith Formation \$26.8 K

✦ McCormack Family Charitable Endowment Fund

Diocese of Orlando Ministry \$17.3 K

Diocese of Orlando Ministry

Outreach Ministries \$7.3 M

The Hackl Family Endowment for Charity

Bishop Grady Villas Sr. Elizabeth Marie Stoup Endowment Fund

Catholic Charities Endowment Fund (AIC)

Bishop Thomas G. Wenski Endowment Fund for Charity

Catholic Charities of Central Florida, Inc. Endowment Fund

Women's Giving Circle Endowment

Zepf Family Catholic Ministries Endowment Fund



Scan to learn more about **Endowment Funds**

Parish Life

Albert J. and Christine M. Hackl Endowment Fund for the benefit of Holy Spirit Church

St. Timothy Catholic Church Endowment Fund

Endowment Fund of the Basilica of Mary Queen of the Universe Shrine

St. Matthew Catholic Church Endowment Fund

St. Ann Catholic Community, Haines City Endowment Fund

St. Joseph Catholic Church, Orlando Endowment Fund

Blessed Trinity Catholic Church, Ocala Endowment Fund

Our Lady of Hope Catholic Church Endowment Fund

Fred Enck Justice Ministry Endowment Fund

St. Vincent de Paul Catholic Church Endowment Fund

St. Mark the Evangelist Catholic Church Endowment Fund

St. Mary of the Lakes Catholic Church Endowment Fund

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

Church of our Saviour Endowment Fund

Resurrection Catholic Church, Winter Garden Endowment Fund

Sacred Heart Catholic Church Endowment Fund

St. Andrew Catholic Church Endowment Fund

St. Anthony Catholic Church Endowment Fund

St. Faustina Catholic Church Endowment Fund

St. Joseph, Lakeland, Catholic Church Endowment Fund

St. Matthew Catholic Church Endowment Fund (OCA)

Sts. Peter and Paul Catholic Church Endowment Fund

St. Mary Catholic Church Endowment Fund

Our Lady Star of the Sea Endowment 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 Trinity Catholic Church, Orlando Endowment Fund

Corpus Christi Catholic Church Endowment Fund

Divine Mercy Catholic Church Endowment Fund

Church of the Epiphany 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

Most Precious Blood Catholic Church Endowment Fund

Church of the Nativity Endowment Fund

Our Lady of Grace 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

Prince of Peace Catholic Church Endowment Fund

Queen of Peace Catholic Church Endowment Fund

St. Ann Catholic Church, Debarry 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. Francis of Assisi Catholic Church Endowment Fund

St. James Cathedral Endowment Fund

St. John Neumann Catholic Church Endowment Fund

St. John Vianney Catholic Church Endowment Fund

St. Joseph Catholic Church, Palm Bay Endowment Fund

St. Joseph Catholic Church, Winter Haven Endowment Fund

St. Margaret Mary Catholic Church Endowment Fund

All Souls Catholic Church Capital Improvement Fund

Resurrection Catholic Church Lakeland Endowment Fund

St. John the Evangelist Catholic Church Endowment Fund

St. Isaac Jogues Catholic Church Endowment Fund

Monsignor Harte Memorial Care of the Basilica Endowment

Kathryn M. Goggin Endowment for Marian Devotion

Blessed Sacrament Catholic Church, Cocoa Endowment Fund

St. Jude Catholic Community Endowment Fund

St. Thomas Aquinas Catholic Church Endowment Fund

Good Shepherd Catholic Church Endowment Fund

Holy Redeemer Catholic Church Endowment Fund

St. Frances Xavier Cabrini Catholic Church Endowment Fund

St. Rose of Lima Catholic Church Endowment Fund

St. Mark Catholic Foundation Endowment Fund

St. Lawrence Catholic Church Endowment Fund



Shepherd's Fund

The Shepherd's Fund provides the Bishop 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. Shepherd's Fund donors give the Bishop the capacity to respond to emergency situations as they arise and the flexibility to embrace opportunities that might otherwise be lost.

Cash received:

\$549,433

Unique donors:

314

Reserve Funds

✦ = NEW THIS FISCAL YEAR

Catholic Education \$15.6 M

- Blessed Trinity Ocala Reserve Fund for Brother's Keeper Ministry
- Charles "Chuck" Murray & Elizabeth "Betty" Murray Fund for Centro Guadalupano
- Church of Our Saviour Quasi-Endowment Fund
- Coto Family Fund
- Deacons 5+ Year Reserve Fund
- Hall Family Tuition Assistance Fund
- Holy Family Catholic Church 3-5 Year Reserve Fund
- Janice R. Lyons Memorial Scholarship Reserve Fund
- Resurrection Catholic Church, Lakeland Quasi-Endowment Fund
- Robert & Jonghyun Peterson Memorial Endowment Fund
- Seminarians - Dorsey
- Seminarians - Other Quasi-Endowment

- St. James Cathedral School 3-5 Year Reserve Fund.
- St. Margaret Mary Catholic Church 5+Year Capital Reserve Fund
- St. Margaret Mary School Teacher Endowment Fund 5+ Year Reserve
- St. Mary of the Lakes Quasi-Endowment Fund
- St. Peter Catholic School 5+ Year Reserve Fund
- St. Peter School Derrigo Teacher and Scholarship 5+ Year Reserve Fund
- St. Thomas Aquinas 3-5 Year Reserve Fund
- St. Thomas Aquinas Catholic Church 5 + Year Reserve Fund
- The Affordable Housing Fund
- The St. Stephen Catholic Community 5+ Year Reserve Fund
- The St. Stephens Catholic Community 3-5 Year Reserve

Church Leadership & Development \$2.2 M

- CFOCF 5+ Year Unrestricted Gifts Cash Reserve Fund
- Dr. Gerald Oswald Scholarship 5+ Year Reserve Fund
- John Kevin Doyle Fund
- Joseph Oswald Scholarship 5+ Year Reserve Fund
- St. Charles Borromeo Catholic Church and School 3-5 Year Reserve Fund

Clerical Life \$82.1K

- Basilica of St. Paul Church and School Quasi-Endowment Fund
- Blessed Trinity, Ocala 3-5 Year Reserve Fund

Outreach Ministries \$3.2 M

- Bishop Grady Villas Temporarily Restricted Fund
- Bishop Moore Catholic High School 3-5 Year Reserve Fund
- CFOCF Distribution Holding Fund
- Elizabeth Buckley Scholarship Fund 5+ Year Reserve
- Morning Star Catholic School 3-5 Year Reserve Fund

Parish Life \$14.5 M

- Annunciation Catholic Academy Capital Reserve Fund
- Blessed Sacrament Harmony 3-5 Year Reserve Fund
- Central Florida Catholic Mercy Fund
- CFOCF 3-5 Year Cash Reserve Fund
- CFOCF 5+ Year Cash Reserve Fund
- Deforest W. and Margaret Y. Bullard Scholarship 5+ Year Reserve Fund
- Emmaus 3-5 Year Reserve Fund
- Father Joseph Nolan Education Reserve Fund
- Fr. Paul Kamide Fund for the Epiphany Help Center
- Morning Star Catholic School 5+ Year Reserve Fund
- Perrault Family Fund
- St. Matthew Quasi-Endowment Fund
- The Shepherd's Fund (INT POOL)

Diocese of Orlando Ministries \$1.3 M

- ✦ CFOCF 5+ Year Unrestricted Gifts Cash Reserve Fund



Learn more about **Shepherd's Fund**

July 1, 2024 – June 30, 2025

Donor Advised Fund Dollars

\$1,234,926

Total Number of DAFs

18

DAF Grants Distributions

\$473,262

Number of Grants Distributed

228

Organizations Supported

62

New Funds

4

The Bauer Family
Donor Advised Fund

Father Ed McCarthy
Donor Advised Fund

The Hillary Family Fund

Terry and Debbie Hamilton
Donor Advised Fund

DAF Payout Rate

69%



Donor Advised Funds

“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

Organizations Supported



Scan to learn more about DAFs.



WOMEN'S Philanthropic Giving Circle of Central Florida

Collective ♥ Compassionate ♥ Catholic



The Women's Philanthropic Giving Circle is a vibrant collective of women committed to faith-driven philanthropy and community transformation in Central Florida. Through pooled financial giving, thoughtful deliberation and site-visit engagement, Circle members identify and fund high-impact initiatives that reflect Catholic values and respond to urgent local needs from supporting women, children and families to serving vulnerable populations.

2025 Grant Awards

Samaritan Resource Center	\$5,000
St. Andrew Catholic Church	\$5,000
Alzheimer's & Dementia	\$5,000
Down Syndrome Association	\$5,000
St. Theresa Catholic Church	\$5,000
Halifax Urban Ministries	\$5,000

Total 2025 Grants: \$30,000

How It Works

1. **Join** at your chosen membership level
2. **Gather** for prayer and fellowship
3. **Learn** about local nonprofit needs
4. **Vote** to select grant recipients
5. **Celebrate** the impact your gift creates
6. **Grow** as a steward and sister in Christ



Scan the QR code to learn more.

2025 Membership

Debbie Balaschak	Marybel Defillo*	Diana Garcia	Debbie Lougheed*	Ultima Morgan	Wendy Sutch*	Cathy Weite
Geraldine Banks-Morais*	Lynda Dennis, Secretary/Treasurer	Colleen Gavigan*	Sarah Luter	Jody North	Marta Sweeney	Patti Ann Welter
Terri Becher	Stevie Dennis	Mary Gmach	Marianne Lyon	Kelly Ordonez, Vice Chair	Valerie Swets	Charlotte White
Anita Behler	Anne Dore*	Mary Jo Haddad	Barbara Malkus	Elizabeth Oros	Loly Thomas-Chubbs	Erika Wikstrom
Niki Bendix	Lisa DuChateau*	Kathleen Hagerty	Samantha Manguiat*	Jody Orosz	Wendy Thomson	Paula Yamakaitis
Kelly Bert	Jeannette Eddy*, Foundation Representative	Nia Herald	Lisa Meier, Program Chair	Zeynep Portway	Lori Tolland, Chair	Rachel Youngs
Carol Bert		Maureen Huntington*	Tyler Minton	Gwyn Sherman*	Morgan Toney, Grants Chair	
Barbara Bowden	Mary Ann Fox	Kathleen Kiley	Layne Missigman	Theresa Simon, Chancery Liaison	Julie Vandendriessche*	* New 2025 Members
Linda Casey	Carol Frechette	Ester Lincourt	Caroline Molins	Kristin Smyk*	Madelyn Weed, Foundation Liaison	Sr. Rosemary Finnegan, O.P., Spiritual Advisor
Margaret Curran	Candise Fromme*	Amanda Livermore	Karen Monteleone	Janet Stoup*		
Patti Deegan				Sally Studlo		



St. Katharine Drexel

A shining example of faithful generosity.

The greatest desire of this saint's heart was to return to God all of the abundance He has blessed her with. **She joyfully shared her fortune, totaling hundreds of millions of dollars, to those in need and gained the priceless treasures of heaven instead.**

Her courageous act of loving generosity earned her the role of patron saint of philanthropists. The Catholic Foundation prayerfully chose St. Katharine Drexel as the patron saint of our mission, as well.

Each day, we dedicate our work to St. Katharine Drexel's example. It is our great honor to deliver the message of the joy of giving to our Catholic brothers and sisters across Central Florida. Through our generous donors, charitable funds, grants, and efforts in education, we strive to bring our Catholic community and our Church to its fullness of charity.

We, as Catholics, trust that she intercedes for those who do good works in her name and the name of Christ. Through the intercession of St. Katharine Drexel, we come together as a spiritual community dedicated to charity, prayer, and the mission of the Church.

St. Katharine Drexel, pray for us!



“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*

Benefits of Joining the St. Katharine Drexel Society through your gift to CFOCF

Spiritual

- Prayer for you and your intentions
- Annual Mass for your intentions on the feast day of St. Katharine Drexel (March 3)
- Treasures in heaven through good works on earth
- Intercession of St. Katharine Drexel as our patron saint

Corporal

- Recognition in our annual impact report
- Invitation to donor and gratitude events throughout the Diocese
- Community and partnership in building God's Kingdom in Central Florida



Who is St. Katharine Drexel?

Scan QR code to learn more about her life and impact

Why Should a Catholic in the Diocese of Orlando Donate to The Catholic Foundation of Central Florida?

July 01, 2024 – June 30, 2025

141 members

\$67,714 Gifts*

**Total raised does not include a \$999,861 unrestricted planned gift received from an anonymous donor.*

Donating directly to The Catholic Foundation of Central Florida (CFOCF) is a powerful way for Catholics in the Diocese of Orlando to strengthen the Church's long-term mission. CFOCF builds and grows "forever funds" - permanent, sustainable sources of financial support for ministries throughout the Diocese ensuring the Church can thrive across generations regardless of economic or donor fluctuations. It also provides strategic grants, philanthropic training, and professional fundraising support to dozens of ministries, helping them grow in impact and self-sufficiency. Through education and outreach, CFOCF forms Catholics in the spirituality of stewardship, guiding families and individuals in morally faithful planned giving and estate decisions that reflect love for both the Church and future generations.

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

55 N. Private Wealth	Byrd & Associates, LLC	Charles Gioglio	David & Christy Lachicotte	Caroline Molins	Frank & Mirna Sagarese	Morgan Toney
Aksala Wealth Advisors	James & Marta Carroll	Theodore & Mary Gloom	Dermot O'Leary	Anthony & Karen Monteleone	Randall & Christine Scott	Frank Tribune
Francilia Alteme	Kevin & Linda Casey	Mary Gmach	Ester Lincourt	Kyle Moore	Gwyn Sherman	Rev. Richard Trout, V.F.
James & JoAnn Ankoviak	Rev. Scott Circe, V.F.	Kevin Bonnewitz & Elisha Gonzalez	Amanda & Jason Livermore	Ultima & John Morgan	Theresa Simon	Gregory & Mary Tulachka
Anonymous (11)	Richard & Nilsa Cuadra	Rosemarie Grebe	Gary & Emily LoDuca	William & Ann Moulton	Bernard Smith	Andrew & Madelyn Weed
Deborah & Jim Balaschak	Margaret & Tom Curran	Linda Groundwater	Debbie & Kirk Loughheed	Andrea Nagy	Mark & Janet Stroup	Cathy & James Weite
Terri & John Becher	Patricia & Patrick Deegan	James & Marguerite Hackl	Edward Loughman	Jody North	James & Sally Studlo	Patricia & Thomas Welter
Anita & Timothy Behler	Paul & Laurie DeLuca	Mary Jo & Fred Haddad	Lowndes	Mark Nothnagle	P.J. & Wendy Sutch	Charlotte & George White
Niki & Joseph Bendix	Lynda & Dave Dennis	Laura & Matthew Haftel	Sarah & Clay Luter	Lisa Oliveras	John & Marta Sweeney	Erika & Arve Wikstrom
Dominic Benevento	Stephanie & Sean Dennis	Kathleen Hagerty	Marianne Lyon	Rev. Ivan Olmo, V.F.	Valerie & Egbert Swets	Jeanne Winters
Nathaniel & Frances Bernardo	Darrell & Catherine DeVaney	Christopher & Angela Hendrix	Barbara Malkus	Kelly & Hector Ordonez	Robert & Wendy Thomson	Paula & John Yamakaitis
Aaron & Kelly Bert	Lisa & Don DuChateau	Nia Herald	Jennifer Malott	Elizabeth Oros	Nelson & Brenda Tirado	Rachel & Brian Youngs
Joe & Carol Bert	Vincent & Beverly Dugar	Susan Hunt	Samantha Manguiat	Andrew & Sonni Orosz	Timothy & Lori Tolland	
Christopher Best	Paul Flaig	Pierre & Woodelyne Ifrene	Mara Law, P.A.	Pineda Law, PLLC	Michael & Suzanne Tomasone	
Paul & Gatetana Bosley	Mary Ann & Gregory Fox	Certified Financial Group, Inc.	Robert & Wendy Mara	Matthew & Leslie Pineda		
Barbara & David Bowden	Carol Frechette	Bradley & Sandy Isberner	Ty & Kylan McCormack	Zeynep & Thomas Portway		
Kevin & Jennie Bowler	Geoffrey & Candise Fromme	Matthew & Julie O'Kane	Gregory & Lisa Meier	Jose & Doris Quinones		
Pasqual & Jessica Bracero	Diana Garcia	Kathleen & Timothy Kiley	Rev. Matthew Mello, V.F.	Jose Ramirez		
Randy Means & Carol Brinati	Joe & Colleen Gavigan	Chi Ko	Michael Miller	Donald & Joanne Remigio		
Melissa Brokaw	James & Cindy Geary	Robert & Judy Kryger	Tyler & John Minton	Elsa Reyes		
Garrett & Amanda Burke	Stephen & Meghan Gerrish		Layne & Paul Missigman	Timothy and Kimberlee Riley		
Duane Byars						





GRANTS

ICSC Scholarship Grant Recipients

Father Bill Burns

Blessed Trinity Catholic Church, Ocala

Kori Blowers

St. Joseph Catholic Church, Orlando

How do you feel this experience will benefit your parish?

"Keeping our office operations centered on the Eucharist will keep our parish aligned with Christ. Focusing on my inner life of stewardship will make me a better support to the pastor, which in turn frees his energy to shepherd people to Heaven. While I brought back many practical things that will be beneficial to the parish, the most import is always remembering what our business is about - helping people encounter Jesus in the Eucharist."

Kori Blowers, St. Joseph • Orlando, Operations Manager
(Pictured with Marybel Defillo (left), parish finance council member)



Marian Essay Contest 2025

Inspired by devotion to the Blessed Mother, the Marian Essay Contest invites 5th- through 8th-grade students in the Diocese of Orlando to deepen their faith and reflect on their role as disciples. Established through the Father Frank X. Zammit Endowment Fund at the Catholic Foundation of Central Florida, the contest offers a \$1,000 scholarship to the winning student. The award may support Catholic education tuition, mission trips, retreats, or charitable donations to a parish or ministry of the student's choice.



Overall 1st Place:

Adam R., Holy Family Catholic School

Top 7th/8th Grade Entry:

Caroline B., St. James Cathedral School

Top 5th/6th Grade Entry:

Camila R., Holy Redeemer Catholic School

HONORABLE MENTIONS:

- Ava A.**, Holy Family Catholic School
- Eleanor A.**, St. Mary Catholic School
- David D.**, Holy Family Catholic School
- Kehano L.**, St. James Cathedral School
- Thalia L.**, Resurrection Catholic School
- Katie M.**, Good Shepherd Catholic School
- Sophie M.**, Holy Family Catholic School

- Maggie M.**, Sacred Heart Catholic School
- Jessica N.**, Annunciation Catholic School
- Bernadette O.**, St. Paul Catholic School
- Hannah R.**, Holy Family Catholic School
- Emma S.**, Resurrection Catholic School
- Sahara U.**, Resurrection Catholic School
- Cathie Z.**, Resurrection Catholic School



Scan to learn more about Marian Essay Contest

Event Sponsorship Grants

The Catholic Foundation of Central Florida (CFOCF) is blessed to provide event sponsorship grants to support diocesan organizations as they spread the good news of their ministry, strengthen donor relationships and raise funds to continue their impactful work. They also enhance awareness of The Foundation and the different ways we serve. Our goal is to support parishes, schools, and ministries throughout the six deaneries of the Diocese of Orlando.

Spring/Summer

\$10,675

All Souls Catholic School Art of Education Gala
All Souls Catholic School

4th Annual Tobin Open Memorial
Ascension Catholic Church

29th Annual Golden Gala: Mardi Gras Masquerade
Ascension Catholic School

Eastern Deanery Catholic School of Volusia County-Casino Night
Knights of Columbus 8086-Our lady of Hope

Bourbon & Bowties Green & Gold Gala
Melbourne Central Catholic High School

8th Annual Friend of San Pedro Gala
San Pedro Spiritual Development Center

Renaissance XLII
Santa Fe Catholic High School

St. James Cathedral School Masquerade Gala
St. James Cathedral School

God's Heart Our Dream Celebration Mass & Donor Appreciation Dinner
St. John the Evangelist Catholic Church

Parish Picnic
St. Joseph Catholic Church

Annual Gala
St. Joseph Catholic School

3rd Annual Mardi Gras
St. Mary Catholic Church

Handbag Bingo
St. Thomas Catholic School

Fall/Winter

\$16,200

2025 Ascension Eagle Pride 5K & 1 Mile Run/Walk
Ascension Catholic School

Car Show
St. John the Baptist Catholic Church

Makers Market Fall Fair & Festival
Blessed Sacrament Catholic Community

21st Annual Harvest Ball
Magnify of Central Florida

Dollars for Scholars Golf Tournament
Holy Redeemer Catholic Church

Soup Bowl Supper
CCCFL- Pathways to Care

18th Annual Fall Festival
St. Mary Catholic School

MPB Family Golf Tournament
Most Precious Blood Catholic Church

Medical Clinic Links for Health
CCFL St. Thomas Aquinas

School Legacy Gala 2025
Bishop Moore Catholic High School

Jeans and Jerseys
Trinity Catholic High School

Rezyzy Gala
Resurrection Catholic School

Trivia Night & Auction
Good Shepherd Catholic School

Jingle Bell 5K
St. Thomas Aquinas Catholic School

Christmas Celebration
San Pedro Spiritual Development

2nd Annual International Festival
St. Peter Catholic Church

Mega Blast
St. Brendan Catholic School

"Bulldog Bowl" Auction Night
St. Charles Borromeo Catholic School

The Guided Wave Gala
Father Lopez Catholic High School

2026 Gala
Holy Family Catholic School

Taste of the Villages
Catholic Charities of Central Florida



Through 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 a major plumbing project. Without this work, the school could not have opened its doors for the fall semester. While the parish has many other facility and building needs, the education of students remained the highest priority; however, the parish could not afford to cover this cost.

Father Joseph Shaute, pastor at St. Mary, shared that they were able to complete the project just before the start of the school year. Thanks to the generosity of faithful donors, students were able to return to their classrooms on time, continuing their Catholic education without disruption.

This grant is one of many ways The Catholic Foundation uplifts parishes and schools in times of crisis, ensuring that our Catholic communities remain strong and vibrant for generations to come. Because of the generosity of donors, the Foundation is able to respond swiftly to urgent needs like this.



If you would like to support future greatest need grants, visit cfocf.org/foundation.



Vivos Christi Society

July 1, 2024 – June 30, 2025

Planned Giving Stats

New Vivos Christi Society Members

64

Legacy Gifts Received

\$5,804,128

Matured Legacy Gifts

45

New Legacy Gift Commitments

\$17,651,069

Total # Vivos Christi Society Members

1,459

Stats

FreeWill Gifts

Total New Bequests 10

Total Estimated Future Value \$1,107,003



Scan to learn more about Legacy Gifts



Matured Gift Beneficiaries

- Basilica of the National Shrine of Mary, Queen of the Universe
- Bill and Ann Fraser Memorial Endowment Fund
- Bishop Moore Catholic High School
- Blessed Trinity Catholic Church, Ocala
- Catholic Charities of Central Florida, Inc.
- Church of the Epiphany
- Diocese of Orlando - Chancery
- Holy Name of Jesus Catholic Church
- Holy Redeemer Catholic Church
- Bishop's Charity Fund
- Morning Star Catholic School
- Our Lady of Lourdes Catholic Church, Daytona Beach
- Our Lady of the Springs Catholic Church
- Prince of Peace Catholic Church
- St. Anthony Catholic Church
- St. Brendan Catholic Church
- St. Clare Catholic Church
- St. Faustina Catholic Church
- St. James Cathedral
- St. John the Evangelist Catholic Church
- St. Jude Catholic Paris
- St. Margaret Mary Catholic Church
- St. Mark the Evangelist Catholic Church
- St. Mary Magdalen Catholic Church
- St. Mary of the Lakes Catholic Church
- St. Matthew Catholic Church
- St. Paul Catholic School
- St. Theresa Catholic Church
- St. Timothy Catholic Church
- The Catholic Foundation of Central Florida, Inc.

Legacy Seminars:

Held in FY 2025

St. Patrick 1/11/25

St. Matthew 1/18/25

St. Timothy 1/23/25

St. Thomas Aquinas 2/8/25

St. Charles Borromeo 3/29/25

St. Faustina 4/5/25



Hear about St. Matthew Catholic Church's experience partnering with The Catholic Foundation to host a **Legacy Planning Seminar**.



Scan to learn more about Legacy Planning Seminars



Wine & Wills 2025 welcomed 40 guests to Father Lopez Catholic High School for an evening of meaningful conversation and personalized estate planning support, helping families protect what matters most and build lasting legacies.

Special thanks to our sponsors - Mara Law P.A., Susan Giacoletto Law, LLC, Daytona Beverages, and S.R. Perrott, Inc. - and to the dedicated attorneys Susan Giacoletto, Wendy Mara, Matt Pineda, and Anthony Pinizzotto, along with notaries Lisa Oliveras and Diana Garcia, for generously sharing their expertise.



Scan to learn more about Wine & Will

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Architect
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Cathedral
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Law offices of Amber Jade
Johnson, PA

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

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Conception
Founder & Owner
Thoughtful Advisors

Sherry A. Madi

Parishioner at Our Lady of the
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Pineda Law, PLLC

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Parishioner of Our Lady of
Hope
Attorney/Owner
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Officer
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Helen Von Dolteren-Fournier, JD, CFP

Parishioner at Nativity
Attorney and Financial Planner
AEGIS Law Firm, P.L.

Paula Yamakaitis

Parishioner at Our Savior
CFO/Sr. VP Real Estate
Selfhelp Community Services

Cameron White, JD

Parishioner at Holy Family
Attorney
Pathways Law, P.A.

*= Founding Member



Who We Are

The Planned Giving Advisory Council (PGAC) brings together estate and financial planning professionals attorneys, CPAs, financial planners, insurance professionals - in service to their clients and the Catholic community across Central Florida.

Our Mission

- Offer educational events and peer networking
- Serve as ambassadors to promote charitable and planned giving
- Support parishes, schools, Catholic ministries, and the broader community through philanthropic tools



Scan here to learn
more about PGAC

CAP® program

The Central Florida CAP® Study Group is a private/public partnership collaborating across sectors and disciplines to do more in our community through philanthropy. The Catholic Foundation, 55 North Private Wealth, and ShuffieldLowman are co-hosting this study group 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.

2025 Graduates

Jeannette L. Eddy, CAP®

Director of Philanthropy
The Catholic Foundation of Central Florida

Daniel J. Kaminski, EA, CAP®

Chief Generosity Officer
Foundation Launch

Elizabeth Moyer, MBA, CFRE, CAP®

Director, Planned and Major Gifts
Orlando Health Foundation



Scan here to learn more about CAP®





Board of Directors



Scan here to learn about the Board

Karen Monteleone – Chair
Robert Kryger – Vice Chair/Treasurer
 Elisha González
 Lori Tolland
 Rachel Youngs
 Garrett Burke
 Matthew Pineda
 Wendy Mara
 David R. Ramos
 Randall Scott
 Andrew Orosz
 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



Madelyn Weed
President & CEO



Nia Herald
VP, Chief Financial Officer



Susan Hunt
Controller



Jeannette Eddy
Director of Philanthropy



Sarah Pinto
Director of Philanthropy



Jose R. Sola
Director of Digital Philanthropy
& Communications



Susan Diaz
Executive Assistant



Clara Melo De Paula
Service & Communications
Coordinator



Lisa Oliveras
Legacy Gifts &
Grants Coordinator



Rosie Camous
Donor Services &
Event Coordinator



Philanthropy Moment

“Each must do as already determined, without sadness or compulsion, for God loves a cheerful giver.”

— 2 Corinthians 9:7



Introducing Faces of Philanthropy – a new series that shines a light on the people behind the generosity: donors, volunteers, advisors, team members, and partners whose stories inspire a deeper commitment to faith, service, and stewardship.

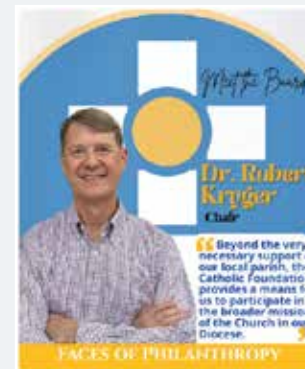
We invite you to learn more about those involved in the initiatives and programs that make up The Catholic Foundation’s ministry and to see how your own journey of giving can make a lasting difference. We are deeply grateful to be part of your philanthropic journey, and to walk with you in building a legacy rooted in faith and generosity.



Scan here to watch on YouTube

Update Your Estate Plan After Big Life Events

Sarah Pinto, CAP®, CFRE
Director of Philanthropy



Scan here to learn about Philanthropy Moment



Scan here to learn about Face of Philanthropy

Statements of Financial Position

— For The Years Ended June 30 —

2025

2024

ASSETS

Cash and cash equivalents	\$2,140,023	\$3,018,989
Investments	17,263,598	11,922,890
Investments restricted for long-term purposes	18,819,615	17,067,222
Agency funds held	101,570,230	85,362,658
Other assets	679,951	780,827
Total Assets	\$140,473,417	\$118,152,586

LIABILITIES

Accounts payable and accrued expenses	\$430,478	\$1,075,628
Agency obligations	101,570,230	85,362,658
Other liabilities	483,556	471,193
Deferred revenue	-	114,320
Total Liabilities	102,484,264	87,023,799

NET ASSETS

Without donor restrictions

Undesignated	1,020,640	717,862
Designated for other purposes	2,012,074	614,661
Designated for donor-advised funds	1,197,787	723,139
Total without donor restrictions	4,230,501	2,055,662

With donor restrictions

	33,758,652	29,073,125
Total net assets	37,989,153	31,128,787

Total liabilities and net assets	\$140,473,417	\$118,152,586
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Statements of Activities

June 30,

2025

2024

PUBLIC SUPPORT AND REVENUE AND NET ASSETS RELEASED FROM TIME AND USE RESTRICTIONS

Development and stewardship service fees	\$2,257,863	\$2,193,147
Investment management service fees	559,687	450,613
Campaign service fees	80,582	345,427
Contributions	4,168,752	2,859,372
Investment income, net	3,782,583	2,919,488
Net assets released from time and use restrictions	-	-
Total public support and revenue and net assets released from time and use restrictions	10,849,467	8,768,047

EXPENSES

Program activities

Grantmaking and managing charitable funds	1,538,143	752,166
Community services	1,344,569	1,613,188
Donor services	651,016	663,191
Total program activities	3,533,728	3,028,545

Supporting activities

Management and general	455,373	686,077
Total supporting activities	455,373	686,077
Total expenses	3,989,101	3,714,622

CHANGE IN NET ASSETS

NET ASSETS - Beginning of year

31,128,787

26,075,362

NET ASSETS - End of year

\$37,989,153

\$31,128,787

To ensure transparency and accountability, our financial statements are reviewed annually by an independent third-party auditor – *Batts Morrison Wales & Lee*.



Scan here to view Financial Statements

Seeds of Faith Funds

Giving in Faith. Growing in Impact.

The Catholic Foundation provides a variety of meaningful giving options that reflect your values and vision for impact. 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.

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.

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.

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.



The Catholic Foundation of Central Florida

Inspire Giving. Fund God's Work.

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.



Connect with us
on **Social Media**

Contact Information

PO Box 4905, Orlando, FL 32802 catholicfoundation@cfocf.org

407-246-4889

www.cfocf.org



Scan here to learn about
Seeds of Faith Funds



Scan here to learn about
Investment Services