

T U R N I N G H O P E I N T O R E A L I T Y



Roman Catholic Foundation
of
EASTERN MISSOURI



Beyond Sunday
Education | Faith | Community

A campaign led by the Roman Catholic Foundation of Eastern Missouri

Building Relationships:

The Campaign Achieves A Milestone

The *Beyond Sunday* campaign recently surpassed the \$100 million mark. While several parishes are still conducting campaigns, the fruits of *Beyond Sunday* are already making a difference. As of March, nearly \$11 million had been returned to parishes to fund specific projects and address local needs.

During the 2017-2018 school year, students will continue to benefit through scholarships made possible by your generous support of the campaign, with nearly \$1.9 million in scholarships awarded to more than 1,230 students at 130 Catholic schools. *Beyond Sunday* scholarships awarded for the first two years of the program total nearly \$3.7 million!

In the first round of *Beyond Sunday* school grants, a total of \$780,000 was awarded to 47 schools and PSR programs through the *Beyond Sunday* Education Fund, with \$735,000 to be distributed in July 2017 so that our parish and archdiocesan schools can begin implementing their projects immediately. For a complete list of all grants, please click here: <http://rcfstl.org/beyond-sunday/newsprogress-to-date/>, and open 2017-2018 *Beyond Sunday* Grant Awardee List

Through this intensive investment in our Catholic education system, schools and PSR programs can enhance their STREAM (Science, Technology, Religion, Engineering, Arts and Mathematics) curricula, build Catholic identity in their school and parish communities through innovation grants, and transform our Catholic education system by helping other schools replicate successful ideas.

Witness Your Life in Christ:

"It is not possible to build bridges between people while forgetting God".

Pope Francis

Live a Stewardship Life:

The Kathy Hertlein Scholarship Endowment Fund



The Kathy Hertlein Scholarship Endowment Fund was recently established to provide scholarship assistance to students attending St. Francis Borgia Regional High School in Washington, Missouri. The Fund honors Kathy Hertlein, a longtime teacher at the high school. It is a tribute to her work, by her daughter and son-in-law.

The Hertlein family wanted to create a scholarship fund that would continue in perpetuity, benefiting families seeking a Catholic high school education for their children. Now that the fund is established, contributions are flowing in each week from former students and fellow faculty members who wish to acknowledge Kathy's service to the students and the school.

Development Director Eileen Chalk notes that this new opportunity is one of many available to Borgia families seeking financial aid: there are more than 20 scholarships and tuition assistance options for families at the school. More than 50% of students receive some form of financial aid. Each year, the school provides more than \$700,000 in aid to families.

St. Francis Borgia Regional High School has a 107-year history, beginning as 2-year school in 1910. The high school expanded its curriculum to become a four-year school in 1934. It currently serves more than 550 students from Washington, Missouri and the surrounding areas.

The Hertlein family strongly supports the mission of the Foundation. They understand that scholarship funds to help ensure that Catholic schools are accessible and affordable throughout the St. Louis region are one of the many services the Foundation offers donors interested in securing the future of our faith in the Archdiocese of St. Louis!

Visit the Roman Catholic Foundation website, <https://rcfstl.org/funds/> to learn about all the funds already established, and to make a donation to one that is of special interest to you.

For information on how you can create an endowment fund to honor a special person in your life, please contact Michael Weisbrod, Gift Planning Officer, at 314.918.2893 or michael.weisbrod@rcfstl.org for more information.



Turning Hope Into Reality:

The Foundation Makes Its Mark in St. Louis

The Foundation has grown rapidly since its inception in 2013. In fact, we were named the ninth-largest foundation in the region in the 2016 *St. Louis Business Journal Book of Lists*. The Foundation continues to grow, with more than \$20 million in assets invested in a variety of funds, including:

- 16 Scholarship Endowment Funds
- 14 Institutional and Field of Interest Endowment Funds
- 5 Unendowed Funds
- 6 Donor-Advised Funds
- 1 Charitable Remainder Trust
- 2 Gifted Insurance Policies
- 8 Testamentary Intentions

Be sure to look for our second annual Report to the Community, to be published in the next few weeks. The Report features stories of donors and the lives they have affected through the more than 40 funds held through the Foundation.

Another advancement of note is the Foundation's upgraded and enhanced website. On our new Funds page, you will find a complete listing of all funds held by the Foundation, with a short description of each fund's purpose and the name of the benefitting organization. Not only does this help spread the

word about our various funds, it allows *any* donor to make a gift to *any* fund at *any* time in *any* amount!

Please visit www.rcfstl.org/funds or click the Funds tab on our homepage to make a difference by making a gift!

Intentional Stewardship:

Gifts That Give Back



The Roman Catholic Foundation now offers Charitable Gift Annuities (CGAs), currently one of the most popular planned giving vehicles.

There are a few reasons donors like CGAs. First, they can turn an asset that is generating little or no income into a CGA, which will provide them an income stream *for life*. Additionally, since the donor is gifting the asset to the Roman Catholic Foundation, a 501(c)(3) organization, they can receive a partial charitable deduction for their gift. Finally, because the remainder of the gift is endowed after the donor's lifetime, donors can be confident that the benefitting organization they designated will receive an income stream in perpetuity!

To learn more about a Charitable Gift Annuity, please visit: <http://rcfstl.org/planned-giving/gifts-that-pay-you-income/charitable-gift-annuity/>.

Another type of gift that can provide the donor with an income for life is the Charitable Remainder Trust. In addition to a partial charitable deduction for making the gift and an enhanced income stream, a Charitable Remainder Trust offers donors more discretion over the ultimate distribution of the funds after their lifetime than a CGA does. Donors often name several of their favorite Catholic organizations as beneficiaries.

The Roman Catholic Foundation is committed to connecting donors with their philanthropic passions, and providing a secure, tax-wise vehicle to make these gifts possible. To establish a Charitable Gift Annuity or other planned gift through the Foundation to benefit a Catholic organization of your choice, please contact Michael Weisbrod, Gift Planning Officer, at 314.918.2893 or michael.weisbrod@rcfstl.org.

A Generous Response

Dear Friends,

The *Beyond Sunday* campaign has crested \$100 million, with more than 23,000 households in the archdiocese participating to date. Through your generosity to *Beyond Sunday*, parishes have received much-needed support, students from middle-income families have increased access to a quality Catholic education, and our parish and archdiocesan schools can continue to be vibrant, competitive and sustainable.



The success of the campaign and the growth of the number of funds held through the Foundation is a testament to the generosity of so many donors and parish leaders throughout the region. We look forward to sharing some of these stories of hope and growth with you in our upcoming Report to the Community.

We also congratulate Bishop Mark S. Rivituso on his episcopal ordination, celebrated on May 2. Bishop Rivituso has served *ex officio* on the Foundation's board since the beginning, and we are grateful for his continued leadership and prayerful guidance.

As you prepare for the summer, and look forward to celebrating another year with family and friends, children and grandchildren, please know you are in our thoughts and prayers, and we are grateful for your continued support.

Sincerely,

A handwritten signature in black ink, appearing to read 'Mark S. Rivituso'. The signature is fluid and cursive, with a horizontal line underneath.

President and CEO

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