



Roman Catholic Foundation
of
EASTERN MISSOURI

*Plan with heart.
Invest for good.*

COMMUNITY REPORT 2017

Mission

INSPIRING *giving* AND CONNECTING DONORS TO CATHOLIC
MINISTRIES, *sustaining* THE LOCAL CHURCH FOR
future GENERATIONS.

*Plan with heart.
Invest for good.*



Dear Friends,

It is our honor to serve as co-chairs of the Board of Trustees for the Roman Catholic Foundation of Eastern Missouri. The Foundation's mission resonates with us, and we are grateful for the opportunity to strengthen our Catholic community. Each year, we grow more excited about the progress the Foundation is making in sustaining the Church for the future. This progress has been the result of the leadership of the board and President & CEO Mark Guyol along with the work of the Foundation staff.

In 2017, the Foundation completed Beyond Sunday, the largest capital campaign in the history of the Archdiocese of St. Louis. Not only was the ambitious \$100 million campaign goal reached, but it was surpassed by more than \$7 million! Local Catholic parishes, schools and school families will benefit from this historic campaign now and long into the future. Success would not have been possible without the leadership and vision of Archbishop Robert J. Carlson, the tireless efforts of our clergy and the generosity of more than 25,000 Catholic donors.

Also happening in 2017, the Foundation established 32 new funds to benefit local Catholic organizations, made its first endowment fund distributions and awarded its first Beyond Sunday school grants. After just a few short years in operation, the Foundation is already making a clear impact on the ministries of our archdiocese. This growth is a reflection of the Foundation's dedicated board and professional staff, but most of all, it is a testament to the many donors who are passionate about their faith and recognize the importance of investing for the future.

In this community report, you will find details of the impact of Beyond Sunday and other funds that have been established. You will also learn about exciting projects on the horizon for the Foundation. It is our pleasure to share with you these stories of progress and faith.

Sincerely,

Nancy and Don Ross
Co-Chairs, Roman Catholic Foundation Board of Trustees



25,500
FAMILY PLEDGES



\$3.7 Million
IN SCHOLARSHIPS



\$14.6 Million
IN DISTRIBUTIONS
TO 184 PARISHES



\$1 Million
IN SCHOOL GRANTS



60%

Transforming Catholic education

60%* OF BEYOND SUNDAY FUNDS ARE ALLOCATED TO CATHOLIC EDUCATION, PROVIDING THE FOLLOWING:

- **Scholarship Support** — financial help for middle-income families to enroll more children in our Catholic schools
- **Academic Capacity Enhancement Grants** — funding to schools to develop more competitive educational programs in the STREAM disciplines (science, technology, religion, engineering, arts and mathematics)
- **Transformational Innovation Grants** — school grants in three areas of organizational transformation—Catholic identity, teaching and management—which will contribute to education system growth and sustainability.

*less campaign expenses



40%

Investing in our parish communities

40% OF BEYOND SUNDAY FUNDS PROVIDE FOR LOCAL PARISH NEEDS.



I AM SO GRATEFUL TO OUR PASTORS AND PAROCHIAL ADMINISTRATORS FOR THEIR OUTSTANDING LEADERSHIP IN CONDUCTING THE BEYOND SUNDAY CAMPAIGN IN THEIR PARISHES. BEYOND SUNDAY COULDN'T HAVE EXCEEDED ITS GOAL WITHOUT THEIR EFFORTS AND THOSE OF THEIR WONDERFUL CAMPAIGN CHAIRS AND COMMITTEE MEMBERS! THANK YOU! AND THANK YOU TO OUR MOST GENEROUS CATHOLIC COMMUNITY!

— Mark J. Guyol, Roman Catholic Foundation President & CEO



BEYOND SUNDAY
Exceeds GOAL!

\$107
MILLION

RAISED TO TRANSFORM
CATHOLIC EDUCATION
AND INVEST IN OUR
PARISH COMMUNITIES

Beyond Sunday, a campaign led by the Roman Catholic Foundation, concluded in 2017 as the most successful capital campaign in the history of the Archdiocese of St. Louis. By providing more students of middle-income families with quality Catholic education and strengthening parishes, Beyond Sunday will make a tremendous impact on our Catholic community!

BLANNER FAMILY | SCHOLARSHIP RECIPIENTS



WITHOUT SUCH SCHOLARSHIPS AS THE FOUNDATION PROVIDES, OUR FAMILY WOULD LIKELY HAVE REMAINED AS A LIGHT UNDER A BASKET...HAD IT NOT BEEN FOR THE EFFORTS OF ARCHBISHOP CARLSON AND THE FOUNDATION, OUR CHILDRENS' FAITH MAY HAVE BEEN LIKE THE SEED THAT FELL UPON SHALLOW SOIL WITH UNDERLYING ROCK (MATTHEW 13:5).

– Mary Blanner, Cathedral Basilica of Saint Louis parishioner

Jeff and Mary Blanner were married in 1994 and have been blessed with eight children, ranging in ages from 22 to six. They believe firmly in the importance of incorporating faith into every aspect of daily life, particularly in their childrens' education, and have made countless sacrifices to provide Catholic education for each of their children.

The Blanners feel greatly blessed to have been recipients in recent years of scholarships for their children through the Roman Catholic Foundation. Their daughter Abigail is a Beyond Sunday Fellow who attends Rosati-Kain High School. Abigail has enjoyed getting to know other Fellows through the service and faith experiences of the Beyond Sunday Fellows Program.

BEYOND SUNDAY FELLOWS PROGRAM



Building young Catholic leaders through faith and community service

The Beyond Sunday Fellows Program provides tuition support to middle-income families with children in grades 9-12 who attend area Catholic high schools. High school scholarship recipients, or Beyond Sunday Fellows, receive tuition support along with Catholic community-building, which will benefit them throughout their lives. Beyond Sunday Fellows participate in annual Roman Catholic Foundation-sponsored service projects and a shared faith experience. These activities help to build the Fellows' identity as a group of young Catholic leaders.



72%

of Americans do not have an up-to-date will
Source: USLegalWills.comSurvey



90%

of Americans think it's important to talk about end-of-life care with loved ones, but only 27% have actually done so
Source: The Conversation Project National Survey



79%

of Americans have not discussed funeral wishes with family members
Source: National Funeral Directors Association

THE CONVERSATION:

A Catholic Perspective on End-of-Life Issues

Launched by the Roman Catholic Foundation in December 2017, *The Conversation* is a new opportunity for Catholics to learn how to give the gift of planning to their families. While no one likes to discuss these sensitive issues, talking with loved ones about the situations that arise at the end of life—and developing written plans in advance—can provide peace of mind and prevent undue burden on family members.

This free seminar provides the Church's guidance on the topics Catholics need to understand in order to plan for the future according to their faith:

- **Principles of Catholic Bioethics**
 - Ordinary and Extraordinary Means of Preserving Life
 - Quality of Life and the Dignity of the Human Person
- **Advance Directives and Estate Planning**
- **Charitable Gift Planning**
- **Funeral and Cemetery Planning**
 - Includes Cremation and Anatomical Donation

The Conversation has been embraced by pastors throughout the Archdiocese of St. Louis who feel strongly that Catholics need and desire this information. Immaculate Conception (Dardenne Prairie) Pastor Msgr. Ted Wojcicki calls the seminar "a home run" and has offered to host the seminar at his parish in 2018.

Look for *The Conversation* to be offered throughout the Archdiocese of St. Louis in 2018 and beyond. For a list of upcoming seminar dates, please visit rcfstl.org/seminars.

Give the gift of planning to your loved ones.



RAY PIONTEK | DONOR

THIS WAS MY REASON FOR MAKING THAT CONTRIBUTION...TO MEMORIALIZE [MY WIFE] FOR THE SACRIFICES SHE MADE AND ALL THE GOOD SHE DID AND CONTINUE THE TYPE OF WORK SHE WAS INTERESTED IN.

– Ray Piontek, St. Rose Philippine Duchesne parishioner

Ray Piontek established the Virginia Celeste Piontek Memorial Scholarship Endowment Fund in memory of his late wife. Virginia Celeste Piontek was a teacher and principal of her parish's Parish School of Religion (PSR) for many years. The endowment fund established in her name benefits the Pontifical Paul VI Institute to provide scholarship assistance to aspiring PSR teachers.

To see Ray tell his story, visit rcfstl.org/piontek

SNAP SHOT 2017

\$31,777,263

ASSETS UNDER MANAGEMENT

\$14,082,451

GRANTS AND DISTRIBUTIONS

32

OF FUNDS ESTABLISHED

\$3,500,000

TESTAMENTARY INTENTIONS ESTABLISHED



YOU HAVE A PASSION
FOR *helping*
OTHERS

Tell them to do *good*, to be rich in *good works*, to *be generous*, ready to *share*, thus accumulating as treasure a *good foundation* for the future, so as to win the life that is *true life*. (1 Timothy 6:18-19)



WE WORK WITH YOU
TO PLAN YOUR
giving STRATEGY

The Roman Catholic Foundation helps you identify your giving goals and maximize the impact of your gifts on the Catholic ministries you love.



WE *steward*
YOUR GIFT

All funds are invested in accordance with the social teachings of the Catholic Church, and donor intent is always honored.



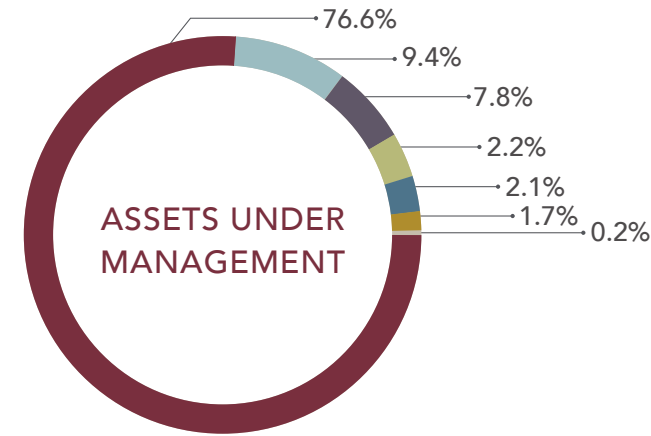
TOGETHER WE
strengthen
OUR CATHOLIC
COMMUNITY

Your planned gifts will sustain local Catholic parishes, schools and ministries for future generations.

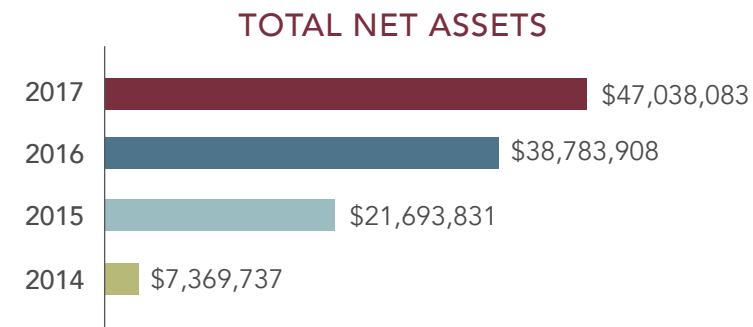
STATEMENT OF FINANCIAL POSITION

As of December 31

| | 2017 | 2016 |
|--|---------------------|---------------------|
| ASSETS | | |
| Cash | \$1,414,422 | \$4,162,687 |
| Investments - At Fair Value | \$34,132,347 | \$19,665,060 |
| Promises to Give - Net | \$44,847,259 | \$49,665,484 |
| Other Assets | \$129,767 | \$164,838 |
| Total Assets | \$80,523,795 | \$73,658,069 |
| LIABILITIES | | |
| Accounts Payable and Accrued Liabilities | \$44,348 | \$94,296 |
| Funds Held for Others | \$30,382,493 | \$32,619,701 |
| Grants Payable | \$2,210,267 | \$2,160,164 |
| Beneficiary Endowments | \$848,604 | - |
| Total Liabilities | \$33,485,712 | \$34,874,161 |
| NET ASSETS | | |
| Unrestricted | \$418,297 | (\$792,236) |
| Temporarily Restricted | \$13,690,091 | \$11,666,924 |
| Permanently Restricted | \$32,929,695 | \$27,909,220 |
| Total Net Assets | \$47,038,083 | \$38,783,908 |
| Total Liabilities and Net Assets | \$80,523,795 | \$73,658,069 |



- **Beyond Sunday Education Endowment Fund** | \$24,331,989
- **Long-Term Funds** | \$2,978,068
- **Endowment Funds** | \$2,486,646
- **Donor-Advised Funds** | \$708,856
- **Charitable Remainder Trust** | \$660,276
- **Charitable Gift Annuities** | \$552,793
- **Charitable Gift Annuities - Agency** | \$58,634



KATHY HOLDMEYER AND RALPH GLOSEMEYER | DONORS

“ WE ESTABLISHED THIS FUND TO SHOW HOW MUCH WE APPRECIATE OUR PARENTS FOR BRINGING US UP TO BE GOOD CATHOLICS AND TO KEEP THE COMMANDMENTS...TO LEARN TO WORK HARD AND FOR THE CHURCH.

– Ralph Glosemeyer, St. Ignatius of Loyola parishioner

Siblings Ralph Glosemeyer, Kathy Holdmeyer and Diane Lierman established the Loretta & Linus Glosemeyer Endowment Fund in memory of their late parents. Loretta and Linus Glosemeyer owned an old-time country store along the Katy Trail for sixty years and were very well known in the Marthasville area. Their

children set up this fund in their memory to ensure Catholic education will be available to children in the area for many years to come. The endowment fund benefits St. Ignatius of Loyola School in Marthasville, Missouri.

To see Kathy and Ralph tell their story, visit rcfstl.org/glosemeyer



BOB GAU | DONOR

THE ROMAN CATHOLIC FOUNDATION MAKES THE PROCESS OF GIVING PAINLESS, EASY, SIMPLE; THEY HANDLE IT.

– Bob Gau, St. Margaret Mary Alacoque parishioner

Bob Gau established the Kathleen Ann Gau Memorial Scholarship Endowment Fund in memory of his late wife, Kathy. The endowment fund offers scholarship support to the families of students who wish to attend Bishop DuBourg High School in St. Louis, Missouri.

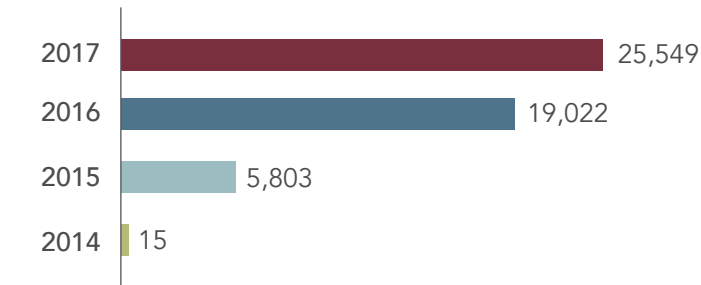
STATEMENT OF ACTIVITIES

For the years ending December 31

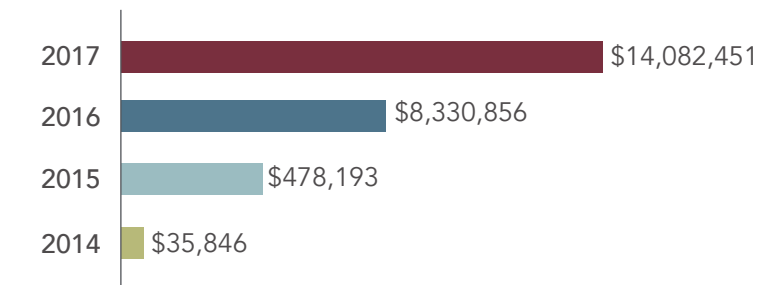
| | 2017 | 2016 |
|--|---------------------|---------------------|
| REVENUE | | |
| Total Contributions, including Amounts Raised for Others | \$19,503,166 | \$49,838,596 |
| Less: Amounts Raised for Others | \$7,891,289 | \$25,556,837 |
| Amounts Received for Beneficiary Endowments | \$803,503 | - |
| Net Contributions | \$10,808,374 | \$24,281,759 |
| OTHER INCOME | | |
| Interest and Dividends | \$406,916 | \$224,780 |
| Investment Gains (Losses)* | \$319,866 | \$88,007 |
| | \$2,373,016 | \$149,692 |
| Total Revenues | \$13,908,172 | \$24,744,238 |
| PROGRAM GRANTS | | |
| Grants | \$3,746,879 | \$3,579,195 |
| Less: Grants Made on Behalf of Beneficiary Endowments | \$1,284 | - |
| Total Grants | \$3,748,163 | \$3,579,195 |
| OPERATING EXPENSES | | |
| Programs | \$626,428 | \$423,623 |
| General and Administrative | \$269,052 | \$249,010 |
| Fundraising | \$1,010,354 | \$3,402,333 |
| Total Expense | \$1,905,834 | \$4,074,966 |
| Change in Net Assets | \$8,254,175 | \$17,090,077 |
| Beginning Net Assets | \$38,783,908 | \$21,693,831 |
| Ending Net Assets | \$47,038,083 | \$38,783,908 |

*Net of Investment Expenses

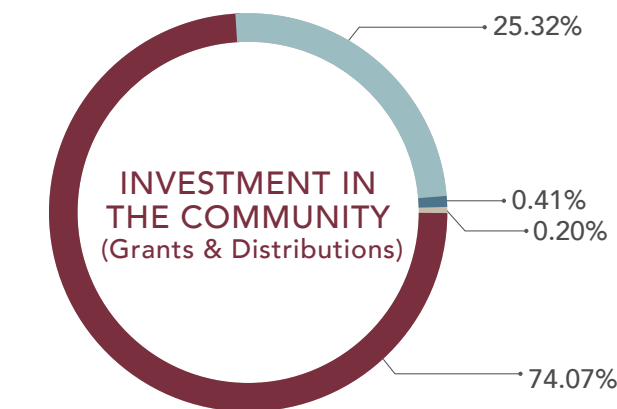
TOTAL DONORS



DISTRIBUTIONS BACK TO THE COMMUNITY



Includes Beyond Sunday parish share distributions



- Parish Life | \$10,431,549
- Catholic Education | \$3,565,288
- Other Catholic Ministries | \$57,414
- Other Charities | \$28,200

FUNDS ESTABLISHED TO DATE

ORGANIZATIONAL ENDOWMENT FUNDS

Annual Catholic Appeal Endowment Fund

Catholic Charities of St. Louis Endowment Fund

Kenrick-Glennon Seminary Endowment Fund

Latin America Apostolate Endowment Fund

Our Lady of Lourdes Catholic Church (Washington) Endowment Fund

Retired Archdiocesan Priests' Endowment Fund

St. Clement of Rome Catholic Church Endowment Fund

St. Dominic High School Scholarship Endowment Fund

St. Francis of Assisi Catholic Church Endowment Fund

St. Gertrude Catholic Church (Krakow) Endowment Fund

St. Margaret Mary Alacoque Parish Endowment Fund

St. Margaret Mary Alacoque Parish School Endowment Fund

St. Mary Parish (Hawk Point) Endowment Fund

St. Robert Bellarmine Catholic Church Scholarship Endowment Fund

St. Mary's High School Endowment Fund

Washington University Catholic Student Center Endowment Fund

ORGANIZATIONAL LONG-TERM FUNDS

Ascension Catholic Church Fund

DONOR-DESIGNATED ENDOWMENT FUNDS

Edward J. Auer Memorial Scholarship Endowment Fund

St. Mary's High School and St. Francis Cabrini Academy (St. Louis)

Al J. Bushman Memorial Scholarship Endowment Fund

St. Mary's High School (St. Louis)

Archbishop Robert J. Carlson Endowment Fund

Kenrick-Glennon Seminary and Respect Life Apostolate (St. Louis)

Friends of the Cathedral Basilica Endowment Fund

Cathedral Basilica of St. Louis (St. Louis)

Kathleen Ann Gau Memorial Scholarship Endowment Fund

Bishop DuBourg High School (St. Louis)

Loretta & Linus Glosemeyer Memorial Endowment Fund

St. Ignatius of Loyola School (Marthasville)

Christopher J. Grimaud Memorial Scholarship Endowment Fund

St. Mary's High School (St. Louis)

Coach Duane Haddox Memorial Scholarship Endowment Fund

St. Francis Borgia Regional High School (Washington)

Kathy Hertlein Scholarship Endowment Fund

St. Francis Borgia Regional High School (Washington)

Donna L. Koelling Memorial Endowment Fund

Marygrove (Florissant)

Edward A. & Kevin G. Koenig Memorial Scholarship Endowment Fund

St. Dominic High School (O'Fallon)

Robert and Geraldine Lammert Memorial Endowment Fund

St. Dominic High School (O'Fallon)

Kathleen McCann & Peter J. Palumbo, Jr. Scholarship Endowment Fund

Rosati-Kain High School (St. Louis)

Monsignor James E. Pieper Scholarship Endowment Fund

St. Clement of Rome School (St. Louis)

Virginia Celeste Piontek Memorial Scholarship Endowment Fund

Pontifical Paul VI Institute (St. Louis)

Phillip J. and Helen C. Piontek Memorial Scholarship Endowment Fund

St. Francis Borgia Church Elementary School (Washington)

Ruth Reiss Pratte Memorial Scholarship Endowment Fund

Rosati-Kain High School (St. Louis)

St. Vincent De Paul Knights of Columbus Endowment Fund

St. Matthias the Apostle Parish – St. Vincent de Paul Conference (St. Louis)

Jane T. Sohm Memorial Scholarship Endowment Fund

St. Mary's High School (St. Louis)

Cadet Thomas Surdyke Memorial Scholarship Endowment Fund

St. Pius X High School (Festus)

Theresa Cova Szwabo Memorial Scholarship Endowment Fund

Rosati-Kain High School (St. Louis)

Teacher Innovation in Education Endowment Fund

St. Francis Borgia Regional High School (Washington)

DONOR-DESIGNATED LONG-TERM FUNDS

Beckmann Family Fund

Saint Anselm Catholic Church (St. Louis)

Conoyer Family Scholarship Fund

Duchesne High School (St. Charles)

Robert and Geraldine Lammert Memorial College Scholarship Fund

St. Dominic High School (O'Fallon)

Robert and Geraldine Lammert Memorial High School Scholarship Fund

St. Dominic High School (O'Fallon)

ROMAN CATHOLIC FOUNDATION FUNDS

Beyond Sunday Education Endowment Fund

Catholic elementary and secondary schools

Roman Catholic Foundation Endowment Fund

Roman Catholic Foundation of Eastern Missouri

SOAR! Scholarship Fund

Select North County and St. Louis City Catholic schools

DONOR-ADVISED FUNDS

Mike and Brenda Dempsey Charitable Fund

Con Franey and Stephanie Re Donor-Advised Fund

Joan and Mark Guyol Family Donor-Advised Fund

Joan and Joseph Lipic Donor-Advised Fund

Ross Family Donor-Advised Fund

Timothy and Susan Sansone Family Donor-Advised Fund

Anonymous Donor-Advised Fund (1)

Anonymous Donor-Advised Funds (2)

Red = New in 2017

68

TOTAL FUNDS



WAYS TO GIVE

How will you sustain your favorite Catholic organization?

Give Now

Make an immediate, outright gift to the endowment fund benefiting your favorite parish, school or ministry.

HOW TO GIVE NOW

- Cash
- Marketable Securities
- Real Estate
- Qualified Charitable Distributions (from IRA)

FOR THOSE WHO...

- Want to provide immediate support
- Have assets available to give
- Want to reduce capital gains tax
- May want to give anonymously
- Seek an immediate charitable deduction

Give Later

Retain control of assets during your lifetime and leave a gift to the endowment fund that benefits your favorite Catholic organization.

HOW TO GIVE LATER

- Will
- Living Trust
- Beneficiary Designations of retirement assets or life insurance policies

FOR THOSE WHO...

- Want to leave a legacy by giving
- Wish to retain control of assets while living
- Wish to make a substantial gift after your lifetime
- Want to help heirs avoid estate tax on retirement accounts and other assets

Give & Receive

Make a gift and receive income for life or a term of years. The remainder at maturity supports the endowment fund of your choice.

HOW TO GIVE & RECEIVE

- Charitable Gift Annuities
- Charitable Remainder Unitrusts

FOR THOSE WHO...

- Want to leave a legacy by giving
- Own appreciated assets
- Seek an additional source of income
- Wish to avoid market volatility
- Seek a partial charitable deduction

ROMAN CATHOLIC FOUNDATION

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Roman Catholic Foundation
of
EASTERN MISSOURI

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*And you will feel secure, because
there is hope; you will look around
and take your rest in security.*

(Job 11:18)

The Roman Catholic Foundation of Eastern Missouri is a 501(c)(3) public charity,
independent from the Archdiocese of St. Louis.