



Roman Catholic Foundation

of

EASTERN MISSOURI

*Plan with heart. Invest for good.*

SUSTAINING OUR LOCAL CHURCH FOR

*Generations to Come*

COMMUNITY REPORT 2019

## Mission

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

*Plan with heart.  
Invest for good.*



## Con Franey & Stephanie Ré Donor-Advised Fund

### *Cathedral Basilica of Saint Louis Parishioners*

*"Giving is an important part of who we want to be in terms of our faith.... So the combination of gifting through the Roman Catholic Foundation, knowing that we will be donating down the line to these organizations, and knowing that it's also tax-smart, [and] that the funds are protected, all works very well and provides a lot of comfort."*

Stephanie Ré, with her husband Con Franey, established a Donor-Advised Fund to support both Catholic and secular organizations that are special to them. The Roman Catholic Foundation, Con Franey says, helped the couple develop their charitable strategy.

To see Con Franey and Stephanie Ré tell their story, visit [rcfstl.org/2019-annual-report](http://rcfstl.org/2019-annual-report)



# Catholic Donor-Advised Funds

## WHAT IS A CATHOLIC DONOR-ADVISED FUND (DAF)?

A Catholic DAF is your own charitable fund administered by the Roman Catholic Foundation. You make contributions to your fund which we invest in accordance with Church teaching.

Once your fund is created, you advise us to make grants from your fund to support the work of your favorite Catholic charitable causes as well as other charities.

Grantee organizations are screened to ensure they do not operate in opposition to the teachings of the Church.

\*A list of Catholic Donor-Advised Funds can be found on page 15.



*A growing number of local Catholics are supporting the causes of their choice and simplifying their giving with a Catholic DAF at the Roman Catholic Foundation.*

## LEGACY CIRCLE FOUNDING MEMBERS

As of December 2019

- Anonymous (29)
- Patricia Ahrens
- Kathleen Baalman
- David & Sharon Baranowski
- Kevin Beckmann
- Rev. Msgr. Francis Blood
- George & Phyllis Bouckaert
- Curtis Burkemper
- \*Alvin Bushman
- John Capellupo
- Daniel & Mary Charles
- Anne-Marie Clarke & Richard Gaines
- Michael & Carol Conoyer
- Barbara Conway
- Michael & Brenda Dempsey
- Mary Rose Desloge
- Leonard & Patricia Dino
- Frank & Rose Duda
- Paul & Marilyn Dudenhoefler
- Brian Engel
- Rev. Msgr. Norbert Ernst
- Harry & Judy Fabick
- Mary Farri
- Rick & Michele Forshaw
- Con Franey & Stephanie Ré
- Niall & Gretchen Gannon
- John & Marilyn Gibbs
- Ralph & Vikki Glosemeyer
- Jerel & Mary Grimaud
- Deacon H. Wayne & Cynthia Groner
- David & Sarah Gulick
- \*Frank & Christine Guyol
- Mark & Joan Guyol
- William & Ruth Hamilton
- Mark Hanneke
- Michael Heck
- Frank Hogg
- Daniel & Kathy Holdmeyer
- Mary Jo Holoubek
- Reverend John Jay Hughes
- Michael & Barbara Hurst
- Roger & Linda Jaques
- Reverend John Keenoy
- John & Marilyn Kluesner
- Leonard & Helen Knobbe
- Norman Koelling
- Carol Kondracki
- Raymond Kopsky, Jr.
- Raymond Kreienkamp & Patricia Amato
- Linda Kurz
- Reverend Robert Lane
- Joseph & Joan Lipic
- Reverend Michael Lydon
- Robert & Nancy Macher
- Michael McMillan
- Michael & Rita Mooney
- Nancy Mueller
- Steve & Connie Notestine
- Robert & Kathleen O'Brien
- \*Joan O'Reilly
- Matt Padberg
- Kathleen McCann Palumbo & \*Peter J. Palumbo, Jr.
- Raymond Piontek
- Jack Pohrer
- Reverend Dennis Port
- Brian Abel Ragen
- James Ressler
- John Riat
- Mary Riegel
- Don & Nancy Ross
- Darryl & Ellen Ross
- Mike & Donna Roth
- Reverend Ronald Rubbelke
- Michael Ryan
- Lynn Ryan
- Douglas & Molly Sansone
- Timothy & Susan Sansone
- Gloria Shraut
- George Schroeder
- David & Loretta Schuster
- Kevin Short
- \*Helen Sloan
- Terrance & Patricia Smith
- David & Diane Snively
- David & Gayle Stratmann
- Timothy & Janice Surdyke
- Donald Szwabo
- John & Karen Temporiti
- Steve & Donna Thielker
- Timothy & Kathleen Thompson
- Reverend Harold Voelker
- Michael & Lisa Walsh
- John Walsh & Paula Bohr
- Rev. Msgr. Walter Whited
- Patricia Williams
- Rev. Msgr. Michael Witt
- Leonard Woker
- Virginia Wolf

\*Deceased Member(s)



## LEGACY CIRCLE

Established in 2018, the Roman Catholic Foundation Legacy Circle recognizes devoted Catholics who have committed to providing for the future of our local Church with a planned gift. Members receive special recognition and are invited to attend the annual Legacy Circle Mass and Breakfast with the Archbishop of St. Louis.

## WHAT IS PLANNED GIVING?

A planned gift, typically of assets, as a part of your estate plan, can make a lasting impact on the Catholic organizations you love while benefiting you and your family.

There are many ways to make planned gifts and enjoy tax and income benefits. If you have questions, please contact us.

We look forward to helping you.

*What will your Catholic legacy be?*

To plan your Catholic legacy, please contact our gift planning experts at 314.918.2890 or [giftplanning@rcfstl.org](mailto:giftplanning@rcfstl.org). Learn more at [rcfstl.org/legacy-circle](http://rcfstl.org/legacy-circle).



BEYOND SUNDAY HAS RAISED  
**\$110 MILLION**  
AND IS MAKING AN IMMEDIATE IMPACT

25,800  
FAMILY  
PLEDGES



**\$32.9 Million**  
DISTRIBUTED TO  
PARISHES



**\$7.2 Million**  
AWARDED IN  
SCHOLARSHIPS



**\$2.3 Million**  
AWARDED IN SCHOOL  
GRANTS



**\$29.7 Million**  
ENDOWED FOR  
CATHOLIC  
EDUCATION

The Roman Catholic Foundation has directed all Beyond Sunday funds (less campaign expenses) to support Catholic education and address local parish needs. No Beyond Sunday contributions have funded or will fund anything else.

## THE ROMAN CATHOLIC FOUNDATION

SUSTAINING THE LOCAL CHURCH FOR FUTURE GENERATIONS.



## BEYOND SUNDAY FELLOWS

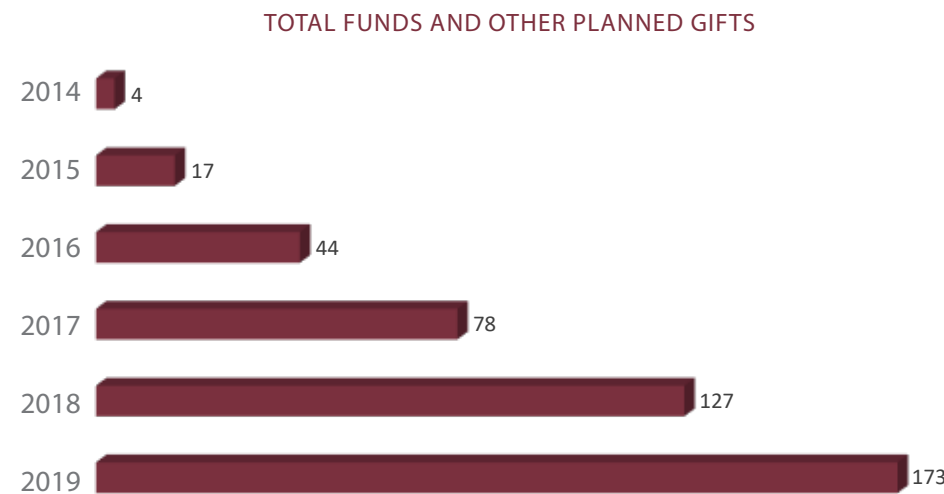
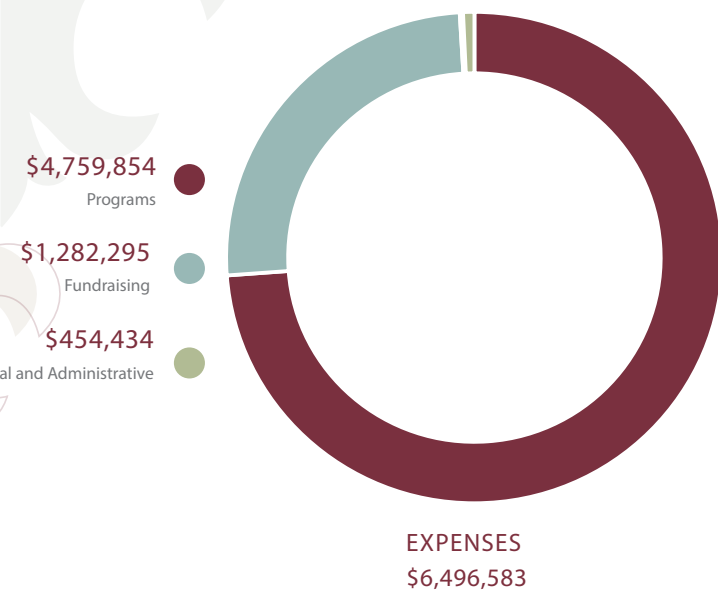
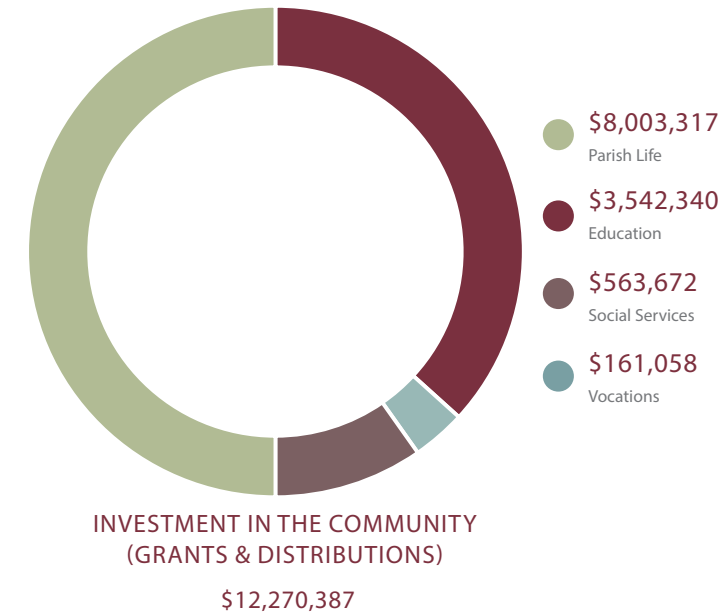
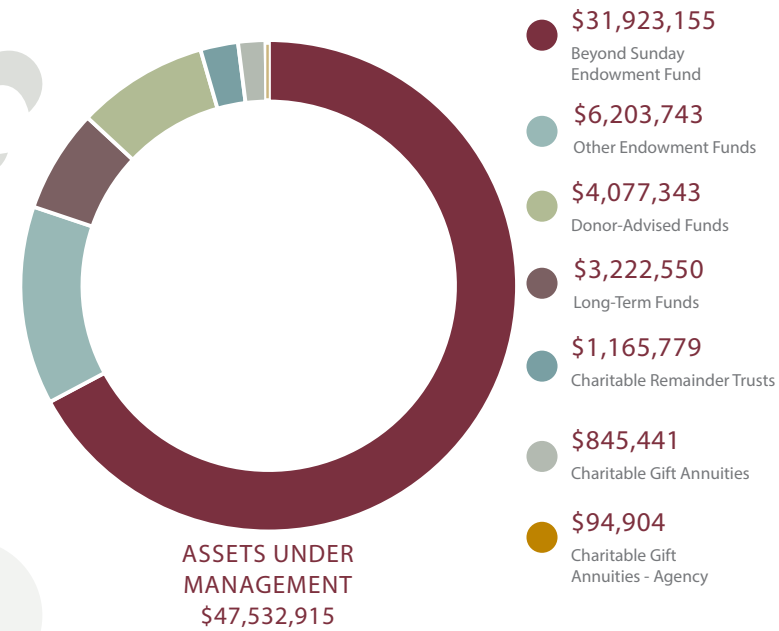
*Beyond Sunday scholarships benefit students in Catholic schools in Kindergarten through 12th grade.*

High school students who receive Beyond Sunday scholarships join a growing network of Beyond Sunday Fellows that includes 157 teens from 26 schools and 80 parishes. Fellows engage in volunteer activities to benefit the community, developing the service and leadership skills they will use now and in the future. In 2019 the Fellows participated in a spring Service Project focused on the spiritual side of mental health awareness, and a November "Faith and Leadership Encounter" where Archbishop Carlson and other speakers inspired them to be future Catholic leaders.



# 2019 Financial Snapshot

# 173 Total Funds and Other Planned Gifts



**728**  
BENEFITING ORGANIZATIONS

**\$47.5M**  
TOTAL ASSETS UNDER MANAGEMENT

**46**  
NEW FUNDS AND OTHER PLANNED GIFTS

**\$12M**  
GRANTS AND DISTRIBUTIONS

**29**  
DONOR-ADVISED FUNDS

**29**  
TESTAMENTARY GIFT INTENTIONS

When you understand Church teaching on the issues that surround the end of life, you can develop plans that will prevent your family from making difficult decisions on your behalf.

This free seminar is for people of all ages and life situations: singles, parents of young families, those caring for aging parents and those facing illness or death. There will be no solicitation at The Conversation and lunch will be provided.

TO REGISTER, PLEASE VISIT  
[RCFSTL.ORG/THE-CONVERSATION](http://RCFSTL.ORG/THE-CONVERSATION)  
OR CALL 314.918.2892

## THE CONVERSATION:

### *A Catholic Perspective on End-of-Life Issues*

PRESENTED BY THE ROMAN CATHOLIC FOUNDATION

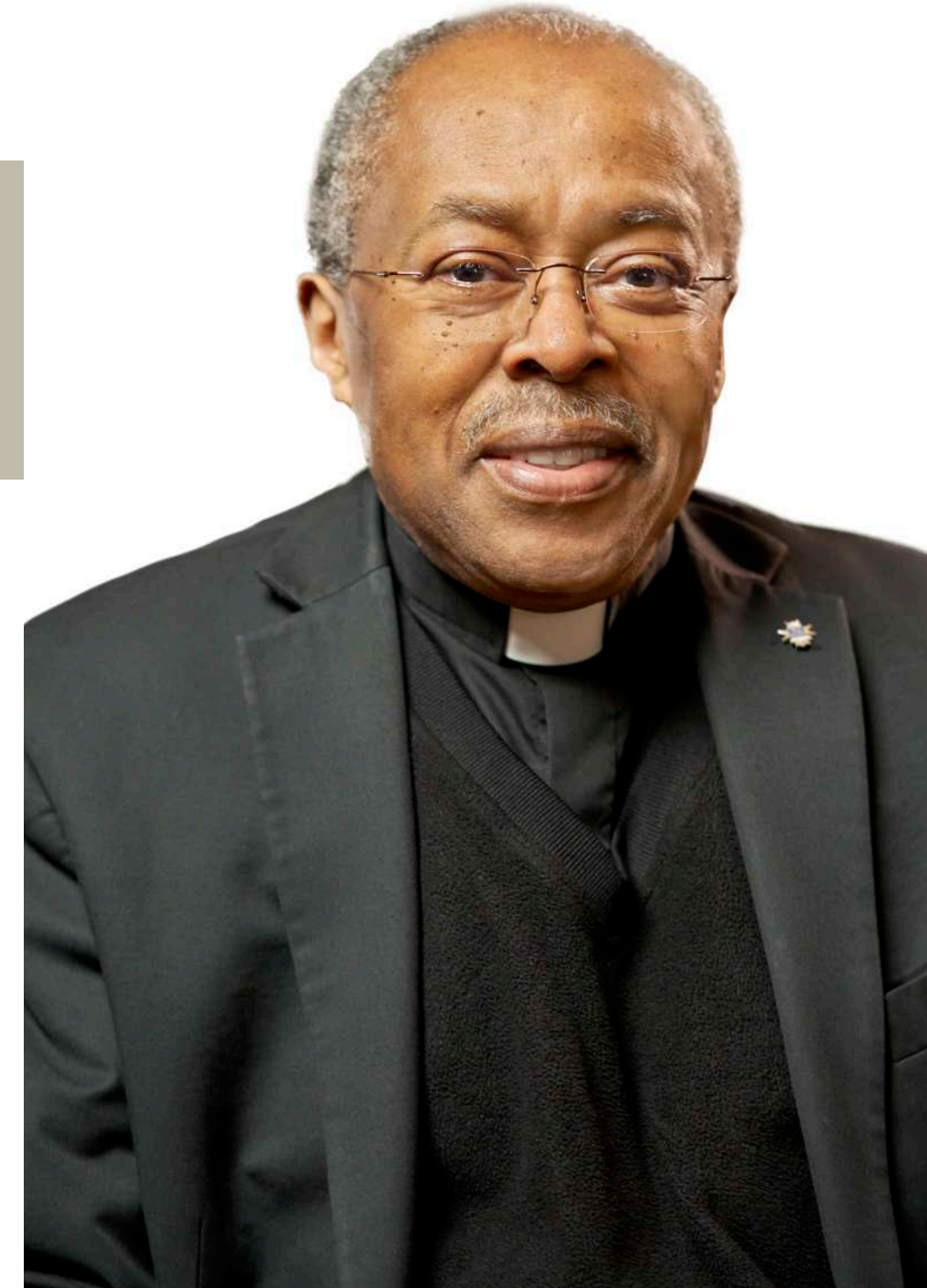
#### TOPICS INCLUDE:

- *Principles of Catholic Bioethics*
- *Advance Directives & Estate Planning*
- *Charitable Legacy Planning*
- *Funeral & Cemetery Planning*

SATURDAY, SEPTEMBER 26, 2020 | 10:00am - 2:00pm  
ST. JOSEPH, IMPERIAL  
6024 Old Antonia Rd, Imperial, MO 63052

SATURDAY, OCTOBER 2, 2020 | 10:00am - 2:00pm  
IMMACULATE CONCEPTION, UNION  
5 N Washington Ave, Union, MO 63084

SATURDAY, NOVEMBER 14, 2020 | 10:00am - 2:00pm  
ST. GABRIEL THE ARCHANGEL  
6303 Nottingham Ave, Saint Louis, MO 63109



## *St. Charles Lwanga Center Endowment Fund*

In the Archdiocese of St. Louis, the St. Charles Lwanga Center offers spiritual formation and leadership development in the African-American Catholic community and beyond. The Center, which serves about 7,000 people annually, promotes racial equality and social justice. In 2019, Helen Sloan established the St. Charles Lwanga Center Endowment Fund.

“She wanted Lwanga Center students to have access to some sort of funds, to give them some more incentive either to find education or stay in an educational program. It’s a wonderful gift, a wonderful legacy she leaves. Like so much of what we do that is Gospel-based, it has so many more implications. It is not just the money for books that has an effect. It has a ripple effect within somebody’s soul, within somebody’s psyche. It lets someone know that somebody else cares.”

Rev. Arthur Cavitt  
Pastor, St. Nicholas Parish  
Executive Director, St. Charles Lwanga Center

To see Father Cavitt discuss the impact of the St. Charles Lwanga Center Endowment Fund, visit [rcfstl.org/2019-annual-report](http://rcfstl.org/2019-annual-report)

# Statement of Financial Position

	2019	2018
<b>Assets</b>		
Cash	\$2,442,963	\$936,513
Investments - At Fair Value	\$50,783,931	\$41,437,725
Promises to Give - Net	\$14,222,359	\$27,972,298
Other Assets	\$112,528	\$105,561
<b>Total Assets</b>	<b>\$67,561,781</b>	<b>\$70,452,097</b>
<b>Liabilities</b>		
Accounts Payable and Accrued Liabilities	\$25,791	\$45,571
Funds Held for Others	\$12,999,309	\$20,588,280
Grants Payable	\$2,257,223	\$2,268,269
Beneficiary Endowments	\$2,435,837	\$1,416,669
<b>Total Liabilities</b>	<b>\$17,718,160</b>	<b>\$24,318,789</b>
<b>Net Assets</b>		
Without Donor Restriction	\$429,064	\$284,113
With Donor Restriction	\$49,414,557	\$45,849,195
<b>Total Net Assets</b>	<b>\$49,843,621</b>	<b>\$46,133,308</b>
<b>Total Liabilities and Net Assets</b>	<b>\$67,561,781</b>	<b>\$70,452,097</b>

# Statement of Financial Activities

	2019	2018
<b>Revenue</b>		
Total Contributions, Including Amounts Raised for Others	\$4,631,449	\$8,958,117
Less: Amounts Raised for Others	\$765,026	\$2,870,863
Amounts Received for Beneficiary Endowments	\$744,340	\$658,930
Net Contributions	\$3,122,083	\$5,428,324
Other Income	\$354,872	\$358,270
Interest and Dividends	\$1,169,249	\$929,946
Investment Gains (Losses)*	\$5,537,198	\$(3,069,791)
<b>Total Revenues</b>	<b>\$10,183,402</b>	<b>\$3,646,749</b>
<b>Program Grants</b>		
Grants	\$4,475,208	\$3,873,578
Less: Grants Made on Behalf of Beneficiary Endowments	\$71,650	\$27,332
<b>Total Grants</b>	<b>\$4,403,558</b>	<b>\$3,846,246</b>
<b>Operating Expenses</b>		
Programs	\$356,296	\$498,420
General and Administrative	\$454,434	\$375,244
Fundraising	\$1,258,801	\$551,898
<b>Total Expense</b>	<b>\$2,069,531</b>	<b>\$1,425,562</b>
<b>Change in Net Assets</b>	<b>\$3,710,313</b>	<b>\$(1,625,059)</b>
Beginning Net Assets	\$46,133,308	\$47,758,367
<b>Ending Net Assets</b>	<b>\$49,843,621</b>	<b>\$46,133,308</b>

\*Net of Investment Expenses



## Collaborating with Professional Advisors

*“The Roman Catholic Foundation works with professional advisors to help our clients achieve their philanthropic goals.”*

*Lori Hootman, Founding Partner, Gateway Legacy Planning*

All investments at the Foundation are screened according to the Socially Responsible Investment Guidelines established by the United States Conference of Catholic Bishops.

The Roman Catholic Foundation has a track record of success, holding over \$45 million in assets and routinely managing complex charitable transactions.

The Foundation offers assistance to CPAs, attorneys, CLUs, CFPs, ChFCs, trust officers and other professionals.

If you turned 70½ or older prior to January 1, 2020\*, you may have the option to lower the income and taxes from your IRA withdrawals with an IRA Charitable Rollover. These funds can be directly transferred to the foundation to help continue the important work of a Catholic ministry of your choosing.

\*If the individual was not 70.5 as of January 1, 2020, the mandatory distributions can be deferred until the age of 72.

*Learn more at [rcfstl.org/professional-advisors](http://rcfstl.org/professional-advisors)*



## Professional Advisor Carl Markus

*Attorney and Shareholder,  
Paule, Camazine & Blumenthal, P.C.*

“The Roman Catholic Foundation is a great resource for the professional advisor... When a client expresses charitable intent to me and wishes to make some kind of charitable gift, particularly when that charitable gift is focused on the Catholic Church in St. Louis, it’s extremely rewarding to help them and to be able to arrange that gift through the contacts I have at the Foundation.”

Carl Markus is an attorney who assists his clients in all aspects of estate and asset-protection planning. He is a regular speaker at the Roman Catholic Foundation’s “The Conversation” seminars held around the Archdiocese.

To hear more from Professional Advisor Carl Markus, visit [rcfstl.org/2019-annual-report](http://rcfstl.org/2019-annual-report)



## FUNDS AND OTHER PLANNED GIFTS

Al J. Bushman Memorial Scholarship Endowment Fund,  
St. Mary's High School (St. Louis, MO)

Annual Catholic Appeal Endowment Fund, Archdiocese of St. Louis  
(St. Louis, MO)

Annunciation Catholic Church Endowment Fund,  
Annunciation Church (Webster Groves, MO)

Anonymous Endowment Fund #1

Archbishop Robert J. Carlson Endowment Fund,  
Kenrick-Glennon Seminary and Respect Life  
Apostolate (St. Louis, MO)

Ascension Catholic Church Fund, Ascension Church (Chesterfield, MO)

Assumption Catholic Church (Mattese) Education Fund,  
Assumption (Mattese) Church (St. Louis, MO)

Assumption Catholic Church (Mattese) Endowment Fund,  
Assumption Church (Mattese)

Assumption of the Blessed Virgin Mary Catholic Church (O'Fallon)  
Chapel Endowment Fund,  
Assumption Church (O'Fallon)

Cadet Thomas Surdyke Memorial Scholarship Endowment Fund,  
St. Pius X High School (Festus, MO)

Catholic Charities of St. Louis Endowment Fund,  
Catholic Charities of St. Louis (St. Louis, MO)

Catholic Youth Apostolate Endowment Fund,  
Catholic Youth Apostolate (St. Louis, MO)

Christopher J. Grimaud Memorial Scholarship Endowment Fund,  
St. Mary's High School (St. Louis, MO)

Coach Duane Haddox Memorial Scholarship Endowment Fund,  
St. Francis Borgia Regional High School  
(Washington, MO)

Daily World Missionnaires Endowment Fund,  
Society For the Propagation of the Faith (St. Louis, MO)

Donna L. Koelling Memorial Endowment Fund,  
Marygrove (Florissant, MO)

Edward A. & Kevin G. Koenig Memorial Scholarship  
Endowment Fund,  
St. Dominic High School (O'Fallon, MO)

Edward J. Auer Memorial Scholarship Endowment Fund,  
St. Mary's High School and St. Frances Cabrini  
Academy (St. Louis, MO) Endowment Funds

Beyond Sunday Education Endowment Fund,  
Catholic Elementary and Secondary Schools

Father Bob Lane Scholarship Endowment Fund,  
St. Dominic High School (O'Fallon, MO)

Father Dempsey's Hotel Endowment Fund,  
Father Dempsey's Charities (St. Louis, MO)

Friends of the Cathedral Basilica Endowment Fund,  
Cathedral Basilica of St. Louis (St. Louis, MO)

ICOM Cemetery Endowment Fund,  
Immaculate Conception Church Cemetery  
(Old Monroe, MO)

ICOM Long-Term Fund,  
Immaculate Conception Church (Old Monroe, MO)

Immaculate Conception Catholic Church Endowment Fund,  
Immaculate Conception Church (Dardenne Prairie, MO)

Immaculate Heart of Mary Catholic Church (New Melle)  
Endowment Fund,  
Immaculate Heart of Mary Church (New Melle, MO)

Immaculate Heart of Mary Catholic Church Endowment Fund,  
Immaculate Heart of Mary Church (St. Louis, MO)

Jane T. Sohm Memorial Scholarship Endowment Fund,  
St. Mary's High School (St. Louis, MO)

John and Marilyn Kluesner Endowment Fund,  
Multiple Organizations

Kathleen Ann Gau Memorial Scholarship Endowment Fund,  
Bishop DuBourg High School (St. Louis, MO)

Kathleen McCann & Peter J. Palumbo, Jr. Scholarship  
Endowment Fund,  
Rosati-Kain High School (St. Louis, MO)

Kathy Hertlein Scholarship Endowment Fund,  
St. Francis Borgia Regional High School (Washington, MO)

Kenrick-Glennon Seminary Endowment Fund,  
Kenrick-Glennon Seminary (St. Louis, MO)

Latin America Apostolate Endowment Fund,  
Latin America Apostolate (St. Louis, MO)

Loretta & Linus Glosemeyer Memorial Endowment Fund,  
St. Ignatius of Loyola School (Marthasville, MO)

M. Rosalie Fusz Endowment Fund, Archdiocese of St. Louis  
(St. Louis, MO)

Messengers of Peace Endowment Fund,  
Messengers of Peace (religious order)  
(Colombia, South America)

Michael & Carol Wolken Memorial Endowment Fund  
to Benefit Adoption & Foster Care,  
Good Shepherd Children & Family Services  
(St. Louis, MO)

Michael P. McMillan Scholarship Endowment Fund,  
Bishop DuBourg High School (St. Louis, MO)

Monsignor James E. Pieper Scholarship Endowment Fund,  
St. Clement of Rome Parish School (St. Louis, MO)

Monsignor James T. Telthorst – St. Louis Cathedral Concerts  
Endowment Fund, Cathedral Concerts (St. Louis, MO)

Most Sacred Heart Catholic Parish – Eureka Endowment Fund,  
Most Sacred Heart Church (Eureka, MO)

Our Lady of Life Apartments Endowment Fund,  
Cardinal Ritter Senior Services  
Our Lady of Life Apartments (St. Louis, MO)

Our Lady of Lourdes Catholic Church Endowment Fund,  
Our Lady of Lourdes Catholic Church (Washington, MO)

Our Lady of the Holy Cross Catholic Church Endowment Fund,  
Our Lady of the Holy Cross (St. Louis, MO)

Phillip J. and Helen C. Piontek Memorial Scholarship  
Endowment Fund,  
St. Francis Borgia Church Elementary School  
(Washington, MO)

Pro-Life Endowment Fund,  
Organizations that demonstrate impact  
on the quest to end abortion

Queen of All Saints Parish and School Endowment Fund,  
Queen of All Saints Church (St. Louis, MO)

Retired Archdiocesan Priests' Endowment Fund,  
Priests' Mutual Benefit Society (PMBS)  
(St. Louis, MO)

Robert and Geraldine Lammert Memorial Endowment Fund,  
St. Dominic High School (O'Fallon, MO)

Roman Catholic Foundation Endowment Fund,  
Roman Catholic Foundation of Eastern Missouri

Rosati-Kain High School Endowment Fund,  
Rosati-Kain High School (St. Louis, MO)

Ruth Reiss Pratte Memorial Scholarship Endowment Fund,  
Rosati-Kain High School (St. Louis, MO)

Sacred Heart Catholic Church (Crystal City) Endowment Fund,  
Sacred Heart Catholic Church (Crystal City, MO)

Sister Joan Andert, SSND, President's Scholarship Endowment Fund,  
Rosati-Kain High School (St. Louis, MO)

St Gabriel the Archangel Parish Endowment Fund,  
St. Gabriel the Archangel Church (St. Louis, MO)

St. Ann Catholic Church – Clover Bottom Endowment Fund,  
St. Ann Church (Washington, MO)

St. Charles Lwanga Center Scholarship Endowment Fund,  
St. Charles Lwanga Center (St. Louis, MO)

St. Clare of Assisi Parish Endowment Fund,  
St. Clare of Assisi Church (Ellisville, MO)

St. Clement of Rome Catholic Church Endowment Fund,  
St. Clement of Rome Church (Des Peres, MO)

St. Cletus Parish Endowment Fund,  
St. Cletus Church (St. Charles, MO)

St. Dominic High School Scholarship Endowment Fund,  
St. Dominic High School (O'Fallon, MO)

St. Francis Community Services Endowment Fund,  
St. Francis Community Services (St. Louis, MO)

St. Francis of Assisi Catholic Church Endowment Fund,  
St. Francis of Assisi (St. Louis, MO)

St. Gertrude Catholic Church Endowment Fund,  
St. Gertrude Church (Krakow, MO)

St. Ignatius Loyola Catholic Church Endowment Fund,  
St. Ignatius Loyola Church (Marthasville, MO)

St. James the Greater Beyond 28 Endowment Fund,  
St. James the Greater Church (St. Louis, MO)

St. John the Apostle Parish and Cemetery Endowment Fund,  
St. John the Apostle Church & Cemetery (Bismarck, MO)

St. Louis Archdiocesan Priests' Doctoral Education Endowment Fund,  
Archdiocese of St. Louis

St. Margaret Mary Alacoque Parish Endowment Fund,  
St. Margaret Mary Alacoque Parish (St. Louis, MO)

St. Margaret Mary Alacoque Parish School Endowment Fund,  
St. Margaret Mary Alacoque School (St. Louis, MO)

St. Mary Magdalen Catholic Church Endowment Fund,  
St. Mary Magdalen Church (Brentwood, MO)

St. Mary Parish Endowment Fund, St. Mary Parish (Hawk Point, MO)

St. Mary's High School Endowment Fund,  
St. Mary's High School (St. Louis, MO)

St. Matthias the Apostle Catholic Church Endowment Fund,  
St. Matthias Church (St. Louis, MO)

St. Peter Catholic Church (Kirkwood) Endowment Fund,  
St. Peter Church (Kirkwood, MO)

## FUNDS AND OTHER PLANNED GIFTS

St. Pius X High School Endowment Fund,  
St. Pius X High School (Festus, MO)

St. Robert Bellarmine Catholic Church Scholarship Endowment Fund,  
St. Robert Bellarmine Catholic Church (St. Charles, MO)

St. Theodore Catholic Parish Endowment Fund,  
St. Theodore Church (Wentzville, MO)

St. Vincent De Paul Catholic Church – Perryville Endowment Fund  
St. Vincent De Paul Church (Perryville, MO)

St. Vincent De Paul Knights of Columbus Endowment Fund,  
St. Matthias Church – St. Vincent De Paul Conference  
(St. Louis, MO)

Teacher Innovation in Education Endowment Fund,  
St. Francis Borgia Regional High School  
(Washington, MO)

The Immacolata Catholic Church Endowment Fund,  
Immacolata Church (St. Louis, MO)

Theresa Cova Szwabo Memorial Scholarship Endowment Fund,  
Rosati-Kain High School (St. Louis, MO)

Trinity Catholic High School Endowment Fund,  
Trinity Catholic High School (St. Louis, MO)

Virginia Celeste Piontek Memorial Scholarship Endowment Fund,  
Pontifical Paul VI Institute (St. Louis, MO)

Washington University Catholic Student Center Endowment Fund,  
Washington University Catholic Student Center  
(St. Louis, MO)

## LONG-TERM FUNDS

Beckmann Family Fund,  
Saint Anselm Church (St. Louis, MO)

Conoyer Family Scholarship Fund,  
Duchesne High School (St. Charles, MO)

Robert and Geraldine Lammert Memorial College Scholarship Fund,  
St. Dominic High School (O'Fallon, MO)

Robert and Geraldine Lammert Memorial High School  
Scholarship Fund,  
St. Dominic High School (O'Fallon, MO)

Roman Catholic Foundation Fund,  
Roman Catholic Foundation

SOAR! Scholarship Fund, Select  
North County and St. Louis City Catholic Schools

St. Margaret Mary Alacoque Catholic School Tuition Aid Fund,  
St. Margaret Mary Alacoque School

## DONOR-ADVISED FUNDS

Anonymous Donor-Advised Fund #1

Anonymous Donor-Advised Fund #2

Anonymous Donor-Advised Fund #3

Anonymous Donor-Advised Fund #4

Anonymous Donor-Advised Fund #5

Anonymous Donor-Advised Fund #6

Anonymous Donor-Advised Fund #7

Anonymous Donor-Advised Fund #8

Baalmann Family Charitable Fund

Baranowski Family Charitable Fund

Charles Family Donor-Advised Fund

Con Franey and Stephanie Ré Donor-Advised Fund

Footwear Unlimited Donor-Advised Fund

George B. Desloge Family Charitable Fund

H. Wayne and Cynthia L. Groner Donor-Advised Fund

Joan and Joseph Lipic Donor-Advised Fund

Joan and Mark Guyol Family Donor-Advised Fund

John and Rosemary Gorrell Memorial Fund

Michael J. Heck Family Charitable Fund

Mike and Brenda Dempsey Charitable Fund

Molly M. and Douglas G. Sansone Donor-Advised Fund

Raymond Kreienkamp and Dr. Patricia Amato Donor-Advised Fund

Reverend Michael J. Lydon Donor-Advised Fund

Ross Family Donor-Advised Fund

Steve and Donna Thielker Charitable Fund

Terry & Patty Smith Charitable Fund

Tim and Kathy Thompson Charitable Giving Account

Timothy and Susan Sansone Family Donor-Advised Fund

Tracy Family Fund

## CHARITABLE GIFT ANNUITIES

Anonymous, Assumption Catholic Church (Mattese)

Anonymous, Catholic Charities of St. Louis

Anonymous, Our Lady of Lourdes Church (Washington, MO)

Anonymous, Our Lady of Lourdes Church (Washington, MO)

Anonymous, Saint Francis Borgia Church (Washington, MO)

Anonymous, Saint Francis Borgia Church (Washington, MO)

Anonymous, Saint Francis Borgia Regional High School  
(Washington, MO)

Anonymous, Saint Francis Borgia Regional High School  
(Washington, MO)

Anonymous, St. Mary Magdalen (Brentwood, MO)

Leonard Knobbe, St. Mary's High School (St. Louis, MO)

Leonard Knobbe, Washington University Catholic Student Center  
(St. Louis, MO)

Mark Hanneke, Catholic Charities of St. Louis (St. Louis, MO)

Rev. Harold Voelker, Retired Archdiocesan Priests' Endowment Fund  
(St. Louis, MO)

Rev. Msgr. Francis Blood,  
Annual Catholic Appeal/Perpetual Light Society

Rev. Msgr. Michael Witt, Kenrick-Glennon Seminary &  
All Saints Church (University City)

Rev. Ronald Rubbelke, Latin America Apostolate &  
Retired Archdiocesan Priests (St. Louis, MO)

Rev. Ronald Rubbelke, Latin America Apostolate & Retired  
Archdiocesan Priests (St. Louis, MO)

## CHARITABLE REMAINDER TRUST

Anonymous, Anonymous Endowment Fund

Anonymous, Today and Tomorrow Educational Foundation  
(St. Louis, MO)

## TESTAMENTARY GIFT INTENTIONS

Helen Sloan + St. Charles Lwanga Center

Joan Steffan O'Reilly +, Roman Catholic Foundation

Anonymous (27)

+ = Deceased Donor

Dear Friends,

It is with pleasure that we report this year's progress at the Roman Catholic Foundation. We now oversee \$47.5 million in assets under management, which is a testament to our influence on local Catholic philanthropy since our launch in 2013. We are, with your support, making a difference.



By providing Catholic planned giving options, the faithful have a better understanding of how they can help sustain our Church for future generations and are eager to engage with the Foundation as a trusted partner. We work with donors to plan effective, life-giving strategies, and we steward these gifts to secure our parishes, schools and ministries long into the future. Our expertise in planned giving through a Catholic lens resulted in a steady growth in funds and other planned gifts this past year, a trend that continues into 2020.

The Conversation: A Catholic Perspective on End-of-Life Issues, our seminar built to educate the faithful about Church teaching surrounding end of life topics, continued to draw hundreds of Catholics in 2019. We are pleased to play a role in providing Catholics with the knowledge they seek and will continue to serve as a resource, both financially and faithfully.



In the midst of our growth, we continue to oversee Beyond Sunday, a campaign that has made a \$74.7 million impact on the local Catholic community as of December 2019. The generosity of our local community to transform our parishes, schools and lives is remarkable.

For another fruitful year, we extend our gratitude to our committed board and mission-driven, hardworking staff. We also thank our supporters, who make the Foundation's work possible. Our faith community has been blessed, and we look forward to continued partnership in working to pass those blessings on to future generations.

Sincerely,

Nancy and Don Ross, Board Co-Chairs | Mark J. Guyol, President & CEO

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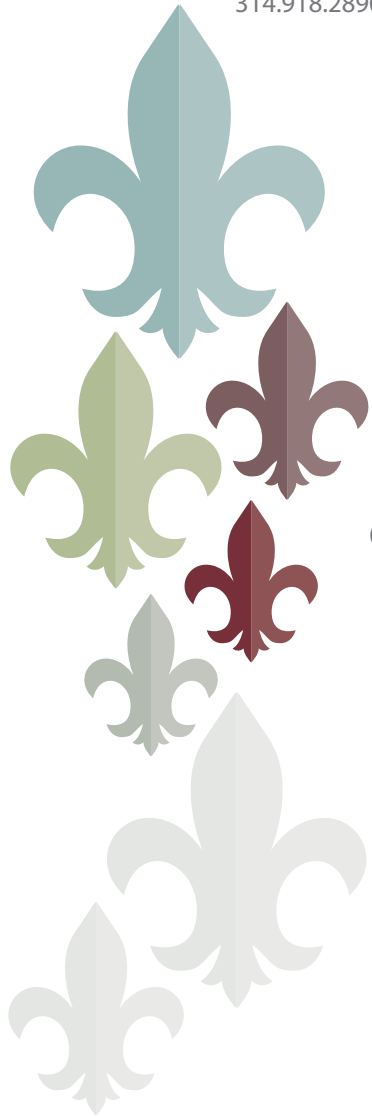
## Roman Catholic Foundation

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