IMPACTING THE FUTURE of our Catholic Community
INSPIRING GIVING
AND CONNECTING DONORS TO CATHOLIC MINISTRIES,
SUSTAINING THE LOCAL CHURCH FOR FUTURE GENERATIONS.
PERPETUATE YOUR GIVING

you have a passion for helping others

You currently support many local Catholic organizations and causes.

What will become of your support after your lifetime?

A planned gift to endowment funds that support one or more Catholic ministries you love will continue your support for generations.

Let us help your philanthropic journey with a plan that's customized for you and your goals.

Visit our website to learn about the many different ways you can create a custom gift plan.

A PLANNED GIFT IS...

A significant charitable contribution
Made during your lifetime or upon death
Part of a financial and/or estate plan
Funded out of assets, not income

As of December 31, 2020

Anonymous (34)
Patricia Ahrens
Kathleen Baalman
David and Sharon Baranowski
Kari and Fred Barton
Kevin Beckmann
Doris Bernat
Reverend James Benz
Rev. Msgr. Francis Blood
George and Phyllis Bouckaert
Rev. Msgr. Jerome Buchheit
Curtis Burknemer
Alvin Bushman*
John Capellupo
Daniel and Mary Charles
Anne-Marie Clarke and Richard Gaines
Michael and Carol Conoyer
Barbara Conway
Michael and Brenda Dempsey
Mary Rose Desloge
Leonard and Patricia Dino
Frank and Rose Duda
Paul and Marilyn Dudenhoefer
Dennis and Caryl Eichholz
Brian Engel
Rev. Msgr. Norbert Ernst
Harry and Judy Fabick
Mark and Dolores Fain
Mary Farri
Ernest Flieg*
Rick and Michele Forsaw
Con Franey and Stephanie Re
Niall and Gretchen Gannon
John and Marilyn Gibbo
Ralph and Vikki Glosemeyer
Jerel and Mary Grimaud
Deacon H. Wayne and Cynthia Groner
David and Sarah Gulick
Mark and Joan Guyol
Frank and Christine Guyol*
William and Ruth Hamilton
Mark Haneke
Michael Heck
Gerard and Jennifer Hempstead
Dorothy Hess*
Reverend James Edwards* & Jeanne Hevesy
Frank Hoog
Daniel and Kathy Holdmeyer
Mary Jo Holoubek
Reverend John Jay Hughes*
Michael and Barbara Hurst
Daniel and Staci Hutl
Roger and Linda Jacques
Paul Jokier*
Reverend John Keenoy
Mary Margaret Kleba
John and Marilyn Kluemen
Len and Helen Knoxbe
Norman Koelling
Raymond Kopsky, Jr.
Raymond Kreienkamp and Maria Amato
Linda Kurz
Robert and Geraldine Lammert*
Reverend Robert Lane
Joseph and Joan Lipic
Reverend Michael Lydon
Robert and Nancy Machek
Michael McMillan
Michael and Rita Mooney
Nancy Mueller
Barbara Murray
Steve and Connie Nesterine
Robert and Kathleen O'Brien
Joan O'Reilly*
Matt Padberg
Kathleen McCann Palumbo and
*Peter J. Palumbo, Jr.
Raymond Piontek
Jack Pohrer
Reverend Dennis Port
Brian Abel Ragen
James Ressler
John Riat
Mary Riegel*
Darryl and Ellen Ross
Don and Nancy Ross
Mike and Donna Roth
Reverend Ronald Rubbeke
Barbara Rubinelli
Michael Ryan
Lynn Ryan
Douglas and Molly Sansone
Timothy and Susan Sansone
Paul Schindler
Gloria Schraut
George Schroeder
David and Loretta Schuster
Joseph and
Rosemary Shaughnessy
Kevin Short
Helen Sloan*
Terrance and Patricia Smith
David and Diane Smely
Gerard and Marjorie Starke
David and Gayle Stratta
Reverend Robert Suit
Timothy and Janice Swarz
Donald Szabo
John and Karen Temporiti
Steve and Donna Thielker
Timothy and Kathleen Thompson
Reverend Harold Voelter
Joseph Vogel
Charles and Janet Walls
Michael and Lisa Walsh
John Walsh and Paula Bohl
Michael and Richelle Weisbrod
Rev. Msgr. Walter White
Patricia Williams
Rev. Msgr. Michael Witt
Leonard Wexer
Virginia Wolf
Michael* and Sharon Wolken
Deceased*

COMMUNITY REPORT 2020 | 1
Catholic Donor-Advised Funds are invested in alignment with your faith in accordance with USCCB guidelines.

A donor-advised fund has several advantages when compared to a private foundation:

- The start-up time and costs are minimal for DAFs.
- Gifts to DAFs are generally deductible at fair market value.
- A DAF is not subject to the distribution requirements and certain excise taxes faced by private foundations.
We knew the Roman Catholic Foundation had everything we needed to start down that road, the journey, to planned giving. It was a natural thing for us to call the Roman Catholic Foundation and say ‘We’re ready. Can we please talk to you about moving forward?’

St. Francis Community Services assists people who are very vulnerable. Their needs are complex. Sometimes it takes years to solve their problems. They started working with the Roman Catholic Foundation to establish an endowment fund that will enable them to be sure that in the years to come they never have to break a promise to a client because they don’t have the funds or resources to carry out their mission.

“We are so limited in our knowledge of planned giving. We don’t have the time, expertise or funding to grow that in our own organization.”
THE CONVERSATION:
END-OF-LIFE PLANNING WEBINARS

The Conversation is a free seminar for people of all ages and life situations to learn about the Church's teaching on Catholic Bioethics, Funeral Planning, and Estate and Charitable Gift Planning.

Fr. Don Henke, D.Th.M., Associate Professor of Moral Theology, Kenrick-Glennon Seminary

Fr. Donald Anstoetter, Director of Worship, Kenrick-Glennon Seminary

Msgr. Henry Breier, Rector, The Cathedral Basilica of St. Louis

Fr. Peter Fonseca, Director of Continuing Formation for Priests, Pastor and Bioethicist

"The general principles of Catholic bioethics indicate the EXTENT as well as the LIMITS of an individual's moral authority to direct his or her health care."

"Give the gift of planning to your loved ones by developing your own written end-of-life plans."

"Every Catholic's highest priority in planning for death should be Sacramental preparation, ensuring your loved ones understand the importance of receiving Anointing of the Sick, the Apostolic Pardon and Viaticum."

"Determining if an action is moral consists of three elements: object (what is directly chosen), intention (the reason the action was chosen) and circumstance (the situation surrounding the object & intention)"
ESTATE PLANNING TIPS
from Ray Kreienkamp

FIRST STEPS...

List all of your assets

Review individual goals and special needs

Determine distribution desires and consider distribution options

Review tax consequences with your attorney and financial advisors

Consider who might be your executor and your decision maker in case of incapacity

Find an estate planning attorney

we work with you to plan your giving strategy
Beyond Sunday, led by the Roman Catholic Foundation, raised $110 million to transform Catholic education in the Archdiocese of St. Louis (60% of funds raised, less expenses) and invest in local parish communities (40% of funds raised). No Beyond Sunday contributions have funded or will fund anything else.
FAITH ALIVE IN THE HOME SEES SIGNIFICANT EXPANSION

A faith formation program to serve young families in two North St. Louis County parishes received a $80,000 Beyond Sunday pilot grant from the Roman Catholic Foundation in 2018. Now, that program – called Faith Alive in the Home – has expanded, with volunteers from 20 parishes across the Archdiocese of St. Louis either completing training or already serving families in their own communities.

Faith Alive in the Home, which today is part of the archdiocesan Department of Evangelization and Parish Ministry Support, engages home visitors to enhance the role of parents as the first teachers of the faith and to support young parents in their own faith formation and spiritual development.

Working with families soon after a child’s baptism, the program addresses a gap in faith formation that exists from infancy and toddlerhood through the child’s start in a Catholic school or parish religious education program.

“The visits help our family connect our domestic church to the greater parish,” one parent reports, “by giving my children early hands-on experiences with parts of the religion that set the foundation for their future growth in the faith and extend the knowledge to parts of Mass to help them further feel comfortable and able to participate.”

Though the coronavirus pandemic temporarily put a stop to in-person sessions in 2020, the program has served about 40 families since its inception and hopes to double that number in 2021.

Faith Alive in the Home “has impacted families in a beautiful way,” says program director Sister Maureen Martin, ASCJ. “I’ve seen a great zeal to share faith.”
ASSETS UNDER MANAGEMENT
$56,801,963
- Beyond Sunday Endowment: $36,178,962
- Other Endowment Funds: $7,727,452
- Donor Advised Funds: $5,514,482
- Long Term Funds: $5,124,616
- Charitable Remainder Trusts: $1,226,207
- Charitable Gift Annuities: $932,799
- Charitable Gift Annuities Agency: $97,445

EXPENSES
$7,650,954
- Programs: $6,523,962
- Fundraising: $504,412
- General and Administrative: $622,580

INVESTMENT IN THE COMMUNITY
$10,380,395
- Parish Life: $6,183,018
- Education: $2,708,599
- Social Services: $1,395,572
- Vocations: $93,206

TOTAL FUNDS AND OTHER PLANNED GIFTS

2014 | 4
2015 | 17
2016 | 44
2017 | 79
2018 | 127
2019 | 182
2020 | 215
## Statement of Financial Position

as of December 31, 2020

<table>
<thead>
<tr>
<th></th>
<th>2020</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Assets</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cash</td>
<td>$740,389</td>
<td>$2,442,963</td>
</tr>
<tr>
<td>Investments - At Fair Value</td>
<td>$62,472,046</td>
<td>$50,783,931</td>
</tr>
<tr>
<td>Promises to Give - Net</td>
<td>$5,424,634</td>
<td>$14,222,359</td>
</tr>
<tr>
<td>Other Assets</td>
<td>$639,498</td>
<td>$112,528</td>
</tr>
<tr>
<td><strong>Total Assets</strong></td>
<td>$69,276,567</td>
<td>$67,561,781</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Liabilities</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accounts Payable and Accrued Liabilities</td>
<td>$425,740</td>
<td>$25,791</td>
</tr>
<tr>
<td>Funds Held for Others</td>
<td>$7,290,490</td>
<td>$12,999,309</td>
</tr>
<tr>
<td>Grants Payable</td>
<td>$3,013,334</td>
<td>$2,257,223</td>
</tr>
<tr>
<td>Beneficiary Endowments</td>
<td>$3,400,556</td>
<td>$2,435,837</td>
</tr>
<tr>
<td><strong>Total Liabilities</strong></td>
<td>$14,130,120</td>
<td>$17,718,160</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Net Assets</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Without Donor Restriction</td>
<td>$1,051,513</td>
<td>$429,064</td>
</tr>
<tr>
<td>With Donor Restriction</td>
<td>$54,094,934</td>
<td>$49,414,557</td>
</tr>
<tr>
<td><strong>Total Net Assets</strong></td>
<td>$55,146,447</td>
<td>$49,843,621</td>
</tr>
<tr>
<td><strong>Total Liabilities and Net Assets</strong></td>
<td>$69,276,567</td>
<td>$67,561,781</td>
</tr>
</tbody>
</table>
## Statement of Financial Activities

as of December 31, 2020

<table>
<thead>
<tr>
<th>Revenue</th>
<th>2020</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Contributions, Including Amounts Raised for Others</td>
<td>$7,653,085</td>
<td>$4,631,449</td>
</tr>
<tr>
<td>Less: Amounts Raised for Others</td>
<td>$241,573</td>
<td>$765,026</td>
</tr>
<tr>
<td>Amounts Received for Beneficiary Endowments</td>
<td>$639,156</td>
<td>$744,340</td>
</tr>
<tr>
<td><strong>Net Contributions</strong></td>
<td><strong>$6,772,356</strong></td>
<td><strong>$3,122,083</strong></td>
</tr>
<tr>
<td>Other Income</td>
<td>$380,059</td>
<td>$354,872</td>
</tr>
<tr>
<td>Interest and Dividends</td>
<td>$877,292</td>
<td>$1,169,249</td>
</tr>
<tr>
<td>Investment Gains (Losses)*</td>
<td>$4,924,073</td>
<td>$5,537,198</td>
</tr>
<tr>
<td><strong>Total Revenues</strong></td>
<td><strong>$12,953,780</strong></td>
<td><strong>$10,183,402</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Program Grants</th>
<th>2020</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grants</td>
<td>$6,307,896</td>
<td>$4,475,208</td>
</tr>
<tr>
<td>Less: Grants Made on Behalf of Beneficiary Endowments</td>
<td>$129,012</td>
<td>$71,650</td>
</tr>
<tr>
<td><strong>Total Grants</strong></td>
<td><strong>$6,178,884</strong></td>
<td><strong>$4,403,558</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Operating Expenses</th>
<th>2020</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Programs</td>
<td>$345,078</td>
<td>$356,296</td>
</tr>
<tr>
<td>General and Administrative</td>
<td>$504,412</td>
<td>$454,434</td>
</tr>
<tr>
<td>Fundraising</td>
<td>$622,580</td>
<td>$1,258,801</td>
</tr>
<tr>
<td><strong>Total Expense</strong></td>
<td><strong>$1,472,070</strong></td>
<td><strong>$2,069,531</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Change in Net Assets</th>
<th>2020</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beginning Net Assets</td>
<td>$49,843,621</td>
<td>$46,133,308</td>
</tr>
<tr>
<td><strong>Ending Net Assets</strong></td>
<td><strong>$55,146,447</strong></td>
<td><strong>$49,843,621</strong></td>
</tr>
</tbody>
</table>

*Net of Investment Expenses
## 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.

<table>
<thead>
<tr>
<th>How to Give Now</th>
<th>For Those Who...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash</td>
<td>Want to provide immediate support</td>
</tr>
<tr>
<td>Marketable Securities</td>
<td>Have assets available to give</td>
</tr>
<tr>
<td>Real Estate</td>
<td>Want to reduce capital gains tax</td>
</tr>
<tr>
<td>Qualified Charitable Distributions (from IRA)</td>
<td>May want to give anonymously</td>
</tr>
<tr>
<td></td>
<td>Seek an immediate charitable deduction</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>How to Give Later</th>
<th>For Those Who...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Will</td>
<td>Want to leave a legacy by giving</td>
</tr>
<tr>
<td>Living Trust</td>
<td>Wish to retain control of assets while living</td>
</tr>
<tr>
<td>Beneficiary Designations of retirement assets or life insurance policies</td>
<td>Wish to make a substantial gift after your lifetime</td>
</tr>
<tr>
<td></td>
<td>Want to help heirs avoid estate tax on retirement accounts and other assets</td>
</tr>
</tbody>
</table>

### 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.

<table>
<thead>
<tr>
<th>How to Give &amp; Receive</th>
<th>For Those Who...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Charitable Gift Annuities</td>
<td>Want to leave a legacy by giving</td>
</tr>
<tr>
<td>Charitable Remainder Unitrusts</td>
<td>Own appreciated assets</td>
</tr>
<tr>
<td></td>
<td>Seek an additional source of income</td>
</tr>
<tr>
<td></td>
<td>Wish to avoid market volatility</td>
</tr>
<tr>
<td></td>
<td>Seek a partial charitable deduction</td>
</tr>
</tbody>
</table>
A lot of times, when you’re in a parish you just worry about paying the bills today, and you don’t worry about putting anything away for the future,” Father Rath explains. “To me, it’s really about making sure we can take care of what we have for the people who come after us.”

For 150 years, parishioners of Immaculate Conception Church in the tiny village of Maryknoll just one mile west of Old Monroe, Missouri, had been paying for the upkeep of the cemetery on the south side of their church out of the parish’s annual operating budget. As the cemetery grew, Father Rich Rath, the parish’s pastor, saw an increasing financial liability looming.

In 2018, Father Rath reached out to the Roman Catholic Foundation, which helped Immaculate Conception establish a $50,000 endowment whose income would support the cemetery’s needs now and into the future. The endowment now stands at $67,000, and it continues to grow. And the parish has more funds each year to devote to the pastoral needs of its people and the broader community.
ENDOWMENT FUNDS

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

Annual Catholic Appeal Endowment Fund Archdiocese of St. Louis

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
Endowment Fund
St. Mary's High School and St. Francis Cabrini Academy
St. Louis, MO

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

Assumption Catholic Church (Matteese) Endowment Fund
Assumption (Matteese) Church
St. Louis, MO

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

Beyond Sunday Education Endowment Fund Catholic Elementary and Secondary Schools

Cadet Thomas Surdnyke Memorial Scholarship Endowment Fund
St. Pius X High School
Festus, MO

Cathedral Basilica of St. Louis Endowment Fund
Cathedral Basilica of St. Louis
St. Louis, MO

Catholic Charities of St. Louis Endowment Fund
Catholic Charities of St. Louis
St. Louis, 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 Haddock Memorial Scholarship Endowment Fund
St. Francis Borgia Regional High School (Washington, MO)

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

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

Edward A. & Kevin G. Koenig Memorial Scholarship Endowment Fund
St. Dominick High School
O’Fallon, MO

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

Father Bob Lane Scholarship Endowment Fund
St. Dominick 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 Cemetery (Old Monroe, MO)

Immaculate Conception Church Endowment Fund
St. Catharine’s Church
(Martha’s Vineyard)

Immaculate Conception Church Endowment Fund
Dardenne Prairie, MO

Immaculate Conception Parish and Cemeteries Endowment Fund
Immaculate Conception Parish & Cemetery
Park Hills, MO

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

Immaculate Heart of Mary Church (New Melle, MO)
St. Louis, MO

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

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

Jane T. Sohm Memorial Scholarship Endowment Fund
St. Mary's 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

John and Marilyn Kruhser Endowment Fund
Messengers of Peace Endowment Fund

Michael & Carol Wolken Memorial Endowment Fund
St. Ignatius School
St. Louis, MO

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

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

Monsignor James T. Tethorst – St. Louis Cathedral Concours Endowment Fund
St. Louis, MO

Most Sacred Heart Catholic Parish – Bureka Endowment Fund
Most Sacred Heart Parish
St. Louis, MO

Our Lady of Life Apartments Endowment Fund
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

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)

Roverend James T. Edwards Memorial Endowment Fund
PMBS and Regina Cleri
(St. Louis, South America)

Robert and Geraldine Lammert Memorial Endowment Fund
St. Dominick High School
O’Fallon, MO

Robert and Geraldine Lammert Memorial Endowment Fund
St. Dominick High School
O’Fallon, MO

Roman Catholic Foundation Endowment Fund
Roman Catholic Foundation of Eastern Missouri

Rosati-Kain High School Class of 1988 Memorial Scholarship Endowment Fund
Rosati-Kain High School
St. Louis, MO

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

Sister Joan Andert, SSND, President’s Scholarship Endowment Fund
St. Joseph (Apple Creek) Cemeteries
St. Joseph (Apple Creek), MO

Special People in Catholic Education (SPICE) Endowment Fund
St. Peter Church (Kirkwood, 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 Family Services Endowment Fund
St. Francis Community Services

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

St. Gertrude Catholic Church Endowment Fund
St. Gertrude Church
Kirkwood, MO

St. Ignatius Loyola Catholic Church Endowment Fund
St. Ignatius Loyola Church
Martha’s Vineyard, 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. Joseph (Apple Creek) and St. Michael (Apple Creek) Cemeteries Endowment Fund
St. Joseph (Apple Creek), MO
Funds and Other Planned Gifts

St. Joseph Catholic Church (Apple Creek) Endowment Fund
St. Joseph Church (Apple Creek, MO)
St. Louis Archdiocesan Priests' Doctoral Education Endowment Fund
St. Louis 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 Academy (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. Maurus Cemetery Endowment Fund St. Maurus Cemetery (Biehle, MO)
St. Monica Catholic Church Endowment Fund St. Monica Church (St. Louis, MO)
St. Patrick Parish Endowment Fund St. Patrick Church ( Wentzville, MO)
St. Peter Catholic Church (Kirkwood) Endowment Fund St. Peter Church (Kirkwood, MO)
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 Parish Endowment Fund St. Theodore Church ( Wentzville, MO)
St. Vincent De Paul Catholic Church Perrylville Endowment Fund St. Vincent DePaul Church (Perrylville, MO)
St. Vincent De Paul Knights of Columbus Endowment Fund St. Vincent De Paul Conference (St. Louis, MO)
St. Genevieve Catholic Church Endowment Fund St. Genevieve Church (St. Genevieve, 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 Siewabo 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 Pionteck Memorial Scholarship Endowment Fund Pontifical Paul VI Institute (St. Louis, MO)
Vision of Peace Heritage_Endowment Fund Vision of Peace Heritages (Pevely, MO)
Washington University Catholic Student Center Endowment Fund Washington University Catholic Student Center (St. Louis, MO)

Donor-Advised Funds

Anonymous Donor-Advised Funds - 10 Baranowski Family Charitable Fund
Anonymous Donor-Advised Funds - Con Franey and Stephanie Re
Anonymous Donor-Advised Funds - Daniel and Staci Huth
Anonymous Donor-Advised Funds - Footwear Unlimited
Anonymous Donor-Advised Funds - George B. Desiole Family Charitable Fund
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Anonymous Donor-Advised Funds - John and Rosemary Gorrell Medal
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Anonymous Donor-Advised Funds - Michael J. Beck Family Charitable Fund
Anonymous Donor-Advised Funds - Mike and Brenda Dempsey Charitable Fund
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Anonymous Donor-Advised Funds - Terry & Patty Smith Charitable Fund
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Anonymous Donor-Advised Funds - Tracy Family Fund

Charitable Gift Annuities

Anonymous - Assumption Catholic Church (Matteese) Endowment Fund
Anonymous - Catholic Charities of St. Louis Endowment Fund
Anonymous - Daily World Missionaries Endowment Fund
Anonymous - Our Lady of Lourdes Church (Washington) Endowment Fund
Anonymous - Our Lady of Lourdes Church (Washington) Endowment Fund
Anonymous - Saint Francis Borgia Church (Washington) Endowment Fund
Anonymous - Saint Francis Borgia Church (Washington) Endowment Fund
Anonymous - Saint Francis Borgia Regional High School Endowment Fund
Anonymous - Saint Francis Borgia Regional High School Endowment Fund
Anonymous - Saint Joseph Church (Apple Creek) Endowment Fund
Anonymous - Saint Mary Magdalen (Brentwood) Endowment Fund
Anonymous - Saint Vincent De Paul (Perrylville) Endowment Fund
Leonard Knobbe - St. Mary's High School Endowment Fund
Leonard Knobbe - Washington University Catholic Student Center Endowment Fund
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Rev. Msgr. Jerome Buchheit - Retired Archdiocesan Priests' Endowment Fund
Rev. Msgr. Michael J. Keen - Retired Archdiocesan Priests' Endowment Fund
Rev. Msgr. Francis Blood - Annual Catholic Appeal/Perpetual Light Society Endowment Fund
Rev. Msgr. Michael Witt - Kenrick-Glennon Seminary Endowment Fund & All Saints Church Endowment Fund
Rev. Ronald Bowdle - Latin America Apostolate Endowment Fund & Retired Archdiocesan Priests' Endowment Fund

Testamentary Gift Intentions

Anonymous (34) Helen Sloan + Joan Stefan O'Reilly + Deceased Donor
Dear Friends,

Historians will look back on 2020 as a year quite unlike any other. The coronavirus pandemic, which began to impact the United States in March, significantly affected our day-to-day lives in so many ways.

In this most challenging year, your support helped sustain so many critical institutions. As Catholic parishes, schools and ministries quickly adapted and evolved – with live-streamed Masses and spiritual engagement, “virtual” classrooms for students, and charitable efforts and social service programs offered in new and creative ways – the importance of Catholic philanthropy was never clearer.

A trusted partner with donors, the Roman Catholic Foundation continues to provide Catholic planned giving options to help the faithful sustain our Church long into the future. As we move into 2021, we are blessed to see a steady and continued growth in generosity, with an increase in funds and other planned gifts. Now in our eighth year, we oversee $56.8 million in assets under management.

Even with unprecedented volatility, our 2020 investment returns were very good and exceeded our benchmarks. We continue our commitment to screening all investments in accordance with the Socially Responsible Investment Guidelines set forth by the United States Conference of Catholic Bishops.

Because of the pandemic, in 2020 our popular “The Conversation” seminar on end-of-life topics was delivered as a series of live online webinars. We are gratified to report that the interactive web sessions attracted 1,074 registrants, with 94% attending live or watching later, far exceeding our expectations. Of those who attended, 100% rated the overall value of the webinar as excellent or good and a high majority indicated they would recommend a future webinar to family and friends.

The Roman Catholic Foundation also continues to oversee the Beyond Sunday campaign. Through December 2020, Beyond Sunday has made a transformative $86.7 million impact locally – a testament to the generosity of the people of the Archdiocese of St. Louis.

Though 2020 was uniquely challenging, we have much for which to be thankful. We are grateful to our committed and hard-working staff and to our mission-focused board. Our faith-filled supporters, too, deserve our thanks – for without you, the Roman Catholic Foundation would be unable to advance our mission to sustain our local Church for future generations in 2021 and beyond.

Sincerely,

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