



Roman Catholic Foundation  
*of*  
EASTERN MISSOURI

2022

COMMUNITY IMPACT REPORT

*Strengthening our  
Catholic Community*

*Inspiring giving, and connecting donors to Catholic ministries,  
sustaining the local church for future generations.*

The Roman Catholic Foundation of Eastern Missouri

## ST. MARTHA GIVING CIRCLE

### Marthas Take Action in First Full Year

The St. Martha Giving Circle lived its mission of raising awareness and funds for worthy causes in its first full year of operation. More than one hundred women came together throughout 2022 to support eight organizations with a combined total of \$45,000!



The ladies first gathered in March 2022 at the beautiful home of Diane and Dave Snively. Following the initial meeting, they nominated

21 inspiring not-for-profit organizations located within the Archdiocese of St. Louis. Approximately 60 members came together at St. Anselm Parish for the "10-for-10" event, where 10 of the nominated organizations offered impressive presentations about the incredible work they are doing across the region. The Marthas members then made several difficult decisions as they chose the gift recipients. The eight organizations with the highest cumulative number of votes were awarded financial gifts ranging from \$3,000 to \$15,000, and all of the recipients expressed their gratitude for such generosity.

The eight organizations that received financial gifts were:

*Abortion Healing Ministry  
of the St. Louis Archdiocesan  
Respect Life Apostolate*  
*June Jessee Memorial Foundation*  
*Our Little Haven*  
*St. Joseph Housing Initiative*  
*Welcome Neighbor STL*  
*Criminal Justice Ministry*  
*St. Martha's Hall*  
*L'Arche STL*



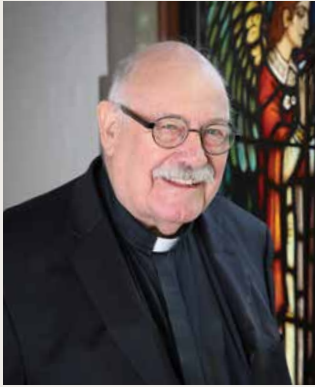
The year rounded out with a beautiful wine and cheese reception held at the Archbishop's residence. Most of the members were in attendance and rejoiced at their accomplishments in such a short time. They are all looking forward to another exciting year as Marthas!



Scan this code or visit the web link below to learn more about the recipients and see a list of the Marthas members!

[bit.ly/RCF-AR22-Marthas](https://bit.ly/RCF-AR22-Marthas)

# PLANNED GIVING



Monsignor  
Michael John Witt

## GIVING BACK - FOREVER

Monsignor Michael John Witt is proud of his St. Louis heritage. As an Archdiocesan priest, he teaches Church History at Kenrick-Glennon Seminary and has written extensively about the local history of the church.

**“There’s no better way for me to continue to support the Church than by helping to form young men as priests.”**

Msgr. Witt decided to establish a Charitable Gift Annuity through the Roman Catholic Foundation as an expression of gratitude for his vocation. He was able to transfer a savings account paying him a low-interest rate to the Foundation, which provided him a charitable deduction. The funds were then invested in a Charitable Gift Annuity, which makes a quarterly distribution to him. Then, after his lifetime, he has directed that the remaining balance will be added to the Kenrick-Glennon Seminary Endowment Fund held by the Foundation.

## RECOGNIZING OUR LEGACY CIRCLE

Established in 2018, the RCF 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.



As of December 31, 2022

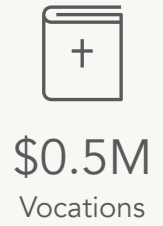
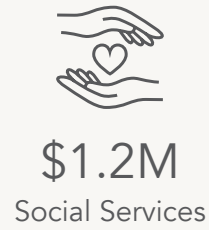
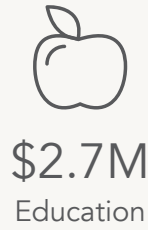
Anonymous (52)  
Patricia Ahrens  
Robert & Susan Allen  
Roy & Gerry Anderson\*  
Castor & Michelle Armesto  
Kathleen Baalmann  
Josephine Baer  
David & Sharon Baranowski  
Kari & Fred Barton  
Margie Benhoff  
Reverend James Benz  
Doris Bernat\*  
Reverend Msgr. Francis Blood  
George & Phyllis Bouckaert  
Reverend Msgr. Jerome Buchheit\*  
Eileen Wood Buescher  
Curtis Burkemper\*  
Alvin Bushman\*  
Collen Bussen  
John Capellupo  
Daniel & Mary Charles  
Anne-Marie Clarke & Richard Gaines  
Michael & Carol Conoyer  
Barbara Conway  
Peter & Beverly Danis  
Michael & Brenda Dempsey  
Mary Rose Desloge  
Leonard\* & Patricia Dino  
Frank & Rose Duda  
Paul & Marilyn Dudenhoeffer  
Jason & Christina Duepner  
Dennis & Caryl Eichholz  
Brian Engel  
Reverend Msgr. Norbert Ernst  
Harry\* & Judy Fabick  
Mary Farri  
Ernest Flieg\*  
Reverend Timothy M. Foley  
Rick & Michele Forshaw

Con Franey & Stephanie Re  
Niall & Gretchen Gannon  
John & Marilyn Gibbs  
Ralph\* & Vikki Glosemeyer  
Jerel & Mary Grimaud  
Deacon H. Wayne & Cynthia Groner  
David & Sarah Gulick  
Mark & Joan Guyol  
Frank & Christine Guyol\*  
William & Ruth Hamilton  
Eugene & Mary Kathleen Hanneke  
Mark Hanneke  
Michael Heck  
Gerard & Jennifer Hempstead  
Dorothy Hess\*  
Alvina B. Huck\*  
Charles H. Huck\*  
Reverend James Edwards\*  
& Jeanne Hevesy  
Helen B. & Oscar J. Hilderbrand, Jr.\*  
Frank Hogg  
Daniel & Kathy Holdmeyer  
Mary Jo Holoubek  
Stephen Holzem  
Reverend John Jay Hughes\*  
Michael & Barbara Hurst  
Daniel & Staci Huth  
Roger & Linda Jacques  
Paul Jokerst\*  
Reverend John Keenoy  
Jerry & Lesa Keeven  
Shirley A. Schweigert Kist  
Mary Margaret Kleba  
John & Marilyn Kluesner  
Len & Helen Knobbe\*  
Norman Koelling  
Raymond Kopsky, Jr.  
Raymond Kreienkamp & Patricia Amato  
Linda Kurz  
Robert & Geraldine Lammert\*

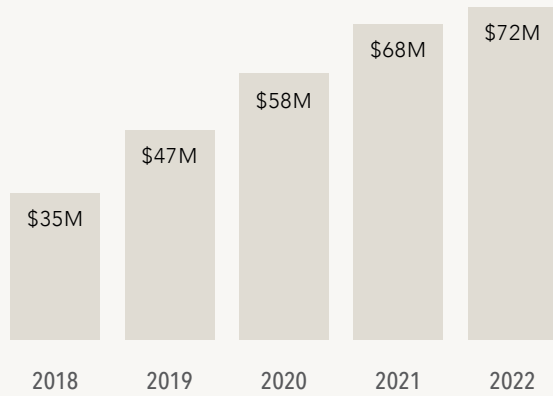
Reverend Robert Lane\*  
Joseph & Joan Lipic  
Michael & Laura Lueken  
Reverend Michael Lydon  
Robert & Nancy Macher  
Michael McMillan  
Jacqueline D. Miller\*  
Michael & Rita Mooney  
Nancy Mueller  
Barbara Murray  
Steve & Connie Notestine  
Robert & Kathleen O'Brien  
Joan O'Reilly\*  
Matt Padberg  
Kathleen McCann Palumbo  
& Peter J. Palumbo, Jr.\*  
Raymond Piontek  
Jack Pohrer  
Reverend Dennis Port  
Michael & Pamela Quigley  
Brian Abel Ragen  
Mary M. Rath\*  
James Ressler  
John Riat  
Mary Riegel\*  
Edward & Kathy Robinson  
Don & Nancy Ross  
Darryl & Ellen Ross  
Mike & Donna Roth  
Reverend Ronald Rubbelke  
Barbara Rubinelli\*  
Lynn Ryan  
Michael Ryan  
Douglas & Molly Sansone  
Timothy & Susan Sansone  
Paul Schindler  
Don & Deby Schlapprizzi  
Christopher Schmidt & Silvia Ortiz  
Gloria Schraut\*  
George Schroeder

Fabian & Carrol Schilly  
David & Loretta Schuster  
Jean M. Schwartz  
Jim & Karen Shaughnessy  
Perry & Mary Simeroth  
Helen Sloan\*  
Terrance & Patricia Smith  
David & Diane Snively  
James & Jacquelyn Spellmeyer  
Joseph M Srnec\*  
Gerald & Marjorie Starke  
David & Gayle Stratmann  
Reverend Robert Suit  
Timothy & Janice Surdyke  
Donald & Merle Swoboda  
Donald Szwabo  
John & Karen Temporiti  
Steve & Donna Thielker  
Timothy & Kathleen Thompson  
Gary & Karen Unnerstall  
Kurt & Michelle Unnerstall  
Richard & Marie Unnerstall  
Reverend Harold Voelker  
Joseph Vogel  
Charles & Janet Wallis  
Michael & Lisa Walsh  
John Walsh & Paula Bohr  
Michael & Richelle\* Weisbrod  
Ludwig Westhoelter\*  
Patricia Williams  
Reverend Msgr. Michael Witt  
Leonard Woker  
Virginia Wolf\*  
Michael\* & Sharon Wolken  
Jean M. Wuenschner  
Michael & Jeanne Zychinski  
\*Deceased

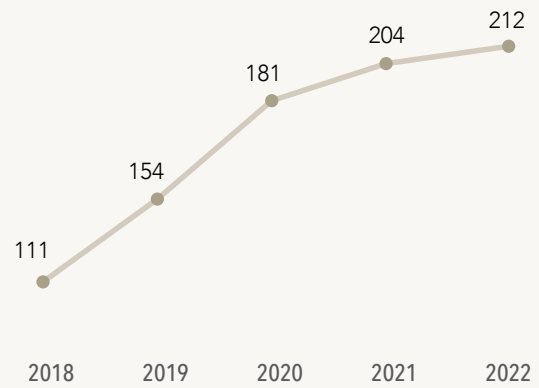
# GRANTS & DISTRIBUTIONS



Cumulative Grant Distributions



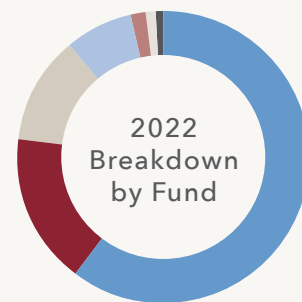
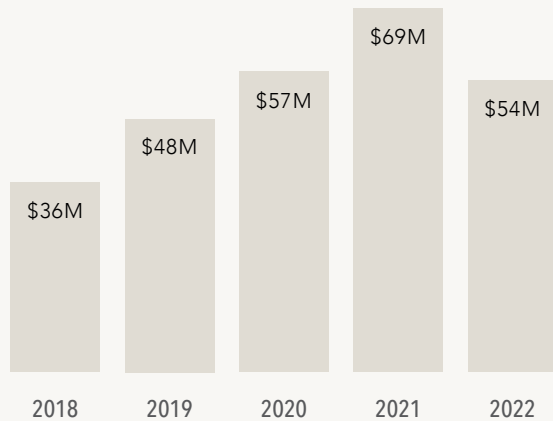
Cumulative Number of Funds



## ASSETS UNDER MANAGEMENT

Cumulative Growth by Year

*down from last year due to poor stock market performance*



- Beyond Sunday Education Endowment.... 60.4%
- Endowment Funds – All Others ..... 16.6%
- Donor-Advised Funds ..... 12.1%
- Long-Term (Unendowed) Funds..... 7.3%
- Charitable Remainder Trusts ..... 1.9%
- Charitable Gift Annuities ..... 1.1%
- Charitable Gift Annuities – Agency..... 0.6%

# PERPETUATE YOUR ANNUAL GIVING

Did you know there is a way to perpetuate your annual support of each and every Catholic organization you love, and it won't cost you a dime during your lifetime?

**Here's how you do it:** Work with the Roman Catholic Foundation to complete an Endowment Fund Estate Gift Agreement that includes the name of the fund, the assets you will contribute upon your passing (or the second to die, if you are married), and the names of the benefiting organizations and the portion of annual fund distributions each will receive.

For example, assume Bob and Betty Jones are Our Lady of Lourdes Parish parishioners. Here is how it works:

|                           |                    |   |                               |                               |
|---------------------------|--------------------|---|-------------------------------|-------------------------------|
| <b>\$800K</b>             | <b>x 25%</b>       | <b>= \$200K</b>                           | <b>x 4.5%</b>                 | <b>= \$9K</b>                 |
| Bob & Betty Jones' estate | donor contribution | Bob & Betty Jones Memorial Endowment Fund | estimated annual distribution | estimated annual distribution |

The Foundation's current endowment distribution rate is 4.5%. So, if your estate gift amount was \$200,000, after your passing, the organizations you name will split approximately \$9,000 each year, in perpetuity!\* And it will cost you nothing during your life.



\*Distributions should grow over time as the value of the fund grows.



## AN ENDOWMENT TO PRESERVE PEACE

About 45 years ago, a member of a religious community in Indiana felt inspired by God to open a house of prayer with hermitages. At around the same time, a Catholic widow with a summer home in Pevely, Missouri, wanted someone to buy her property who would have a religious affiliation. Through Divine Providence and the work of many others, today Vision of Peace is a Catholic retreat center offering individual spiritual retreats and is managed by a volunteer board of priests and laity who maintain the property and nine hermitages.

In recent years, a retired Catholic widow at the Cathedral Basilica Parish came to Vision of Peace to garden at the invitation of Msgr. Greg Mikesch, a Board member and her spiritual director. Being inspired prayerfully, volunteer gardening turned into the role of the on-site volunteer manager when the paid director left. The new manager had also recently been assisted by Michael Weisbrod of the Roman Catholic Foundation to set up her own endowment to ensure her assets would continue to benefit her beloved charities. It was natural then for Msgr. Mikesch and the manager to set up the Vision of Peace Hermitages Endowment Fund with RCF.

The ministry of Vision of Peace began with one Catholic widow's assets, and will continue in perpetuity with the gifts of another Catholic widow and others.

# BEYOND SUNDAY



**Beyond Sunday**  
Education | Faith | Community

## BY THE NUMBERS as of December 31, 2022

25,800  
family pledges



\$44.3M  
distributed  
to parishes



\$16.5M  
awarded in  
scholarships



\$3.1M  
awarded in  
school grants



\$33M  
endowed for  
Catholic education

*down from last year due to poor  
stock market performance*

## THANK YOU!

### Beyond Sunday, led by the Roman Catholic Foundation of Eastern Missouri, raised more than \$100 million to transform Catholic Education

Beyond Sunday, led by the Roman Catholic Foundation, raised over \$100 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.

Since its launch in the 2016-2017 school year, Beyond Sunday has distributed \$3.1 million in grants to Catholic schools for innovative and transformative projects. In addition, over 2,250 students and 2,100 families have been awarded \$16.5 million in scholarships, making it easier for them to attend Catholic schools.



High school students who receive Beyond Sunday scholarships participate in the Beyond Sunday High School Fellows program. Each year, the 160 students participate in two events that help them to become the next generation of Catholic leaders. In the fall, students attend the Fellows Faith and Leadership Encounter. They celebrate Mass with the Archbishop of St. Louis, followed by a program focused

on important topics for future leaders. In 2022, Fellows were led in a discussion about how all of us are called to evangelize. Javier Orozco and James Fowlkes-Comminellis from the Office of Human Dignity and Intercultural Affairs at the Archdiocese of St. Louis challenged the students to find ways to spread the message of the gospel in their day-to-day lives.

In the spring, Fellows complete service projects for charities around the region. Although these events have not been held for the last few years due to Covid restrictions, they will re-launch in the spring of 2023.

With a substantial endowment of over \$30 million, Beyond Sunday is positioned to continue providing Catholic children across the Archdiocese with a more accessible Catholic education for years to come.

# DONOR-ADVISED FUNDS

## SIMPLIFYING A FAITHFUL LEGACY

Patty and Terry Smith both have roots in Catholic education in the Archdiocese of St. Louis. Terry graduated from Vianney High School and went on to St. Louis University, where he met Patty.



They married and lived in St. Louis for 25 years, raising their three children while Terry worked in the corporate world and Patty taught mathematics for the Archdiocesan schools. Terry's career prompted a move to Houston, where Patty continued teaching in the Catholic school system. Upon retirement, they returned to St. Louis.

Terry and Patty see charitable contributions as a way of sharing their many blessings from the Lord. But managing the timing of sources and gifts each year became increasingly time-consuming. Their estate-planning attorney recommended a Donor-Advised Fund and that, as faithful Catholics, they should call the Roman Catholic Foundation to discuss creating the fund with the Foundation.

"Patty and I share the Catholic values behind everything the Foundation supports. Creating the DAF was easy, and we encourage anyone who would like to simplify their annual giving to consider a Donor-Advised Fund with the Roman Catholic Foundation." – Terry Smith

## BENEFITS OF A DONOR-ADVISED FUND

- Gift highly appreciated assets like stock and real estate and avoid all capital gains taxes and still receive full value of charitable tax deductions.
- Option to make gifts to the DAF in years when one needs deductions, and use funds within the DAF for years to come.
- The Foundation handles all recordkeeping with information available at any time.
- Research on Catholic and non-Catholic organizations to ensure the work is consistent with Catholic values and teachings.
- DAF available for Annual Catholic Appeal, parish offertory gifts, and capital campaigns.
- Options for the donor to select the investment style that best suits their comfort level.
- Donors can direct where they wish any remaining funds to be gifted at such time as they and their children are no longer able or wish to make gifts from their fund.



[bit.ly/RCF-DAFP](https://bit.ly/RCF-DAFP)

### Learn more about Donor-Advised Funds

The Roman Catholic Foundation produced an educational video about Donor-Advised Funds in 2022. Please share it on social media or via email today! Visit our website or scan the QR code to learn how easy it is to establish and maintain, and even transfer your DAF from another custodian.

# STATEMENT OF FINANCIAL POSITION

| As of December 31, 2022                  | 2022                | 2021                |
|--|---------------------|---------------------|
| <b>ASSETS</b>                            |                     |                     |
| Cash                                     | \$1,093,684         | \$600,064           |
| Investments - At Fair Value              | \$56,689,174        | \$72,271,790        |
| Promises to Give - Net                   | \$144,549           | \$362,319           |
| Other Assets                             | \$531,811           | \$582,626           |
| <b>Total Assets</b>                      | <b>\$58,459,218</b> | <b>\$73,816,799</b> |
| <b>LIABILITIES</b>                       |                     |                     |
| Accounts Payable and Accrued Liabilities | \$302,508           | \$370,733           |
| Funds Held for Others                    | \$1,580,729         | \$2,702,842         |
| Grants Payable                           | \$3,340,148         | \$3,198,999         |
| Beneficiary Endowments                   | \$3,380,168         | \$4,135,325         |
| <b>Total Liabilities</b>                 | <b>\$8,603,553</b>  | <b>\$10,407,899</b> |
| <b>NET ASSETS</b>                        |                     |                     |
| Without Donor Restriction                | \$2,198,018         | \$479,896           |
| With Donor Restriction                   | \$47,657,647        | \$62,929,004        |
| <b>Total Net Assets</b>                  | <b>\$49,855,665</b> | <b>\$63,408,900</b> |
| <b>Total Liabilities and Net Assets</b>  | <b>\$58,459,218</b> | <b>\$73,816,799</b> |

# STATEMENT OF FINANCIAL ACTIVITIES

| As of December 31, 2022                                  | 2022                 | 2021                |
|--|----------------------|---------------------|
| <b>REVENUE</b>   |                      |                     |
| Total Contributions, Including Amounts Raised for Others | \$3,451,044          | \$7,044,079         |
| Less: Amounts Raised for Others                          | (\$319,118)          | (\$667,171)         |
| Less: Amounts Received for Beneficiary Endowments        | (\$112,150)          | (\$273,332)         |
| Net Contributions  | \$3,019,776          | \$6,103,576         |
| Other Income   | \$265,393            | \$331,178           |
| Interest and Dividends                                   | \$1,546,733          | \$1,044,871         |
| Investment Gains (Losses)*                               | (\$12,905,586)       | \$6,461,765         |
| <b>Total Revenues</b>                                    | <b>(\$8,073,684)</b> | <b>\$13,941,390</b> |
| <b>PROGRAM GRANTS</b>                                    |                      |                     |
| Grants   | \$4,734,587          | \$4,581,215         |
| Less: Grants Made on Behalf of Beneficiary Endowments    | (\$51,607)           | (\$74,125)          |
| <b>Total Grants</b>                                      | <b>\$4,682,980</b>   | <b>\$4,507,090</b>  |
| <b>OPERATING EXPENSES</b>                                |                      |                     |
| Program  | \$340,733            | \$309,576           |
| General and Administrative                               | \$473,535            | \$548,839           |
| Fundraising  | (\$17,697)           | \$313,432           |
| <b>Total Expense</b>                                     | <b>\$796,571</b>     | <b>\$1,171,847</b>  |
| Change in Net Assets                                     | (\$13,553,235)       | \$8,262,453         |
| Beginning Net Assets                                     | \$63,408,900         | \$55,146,447        |
| <b>Ending Net Assets</b>                                 | <b>\$49,855,665</b>  | <b>\$63,408,900</b> |

\*Net of Investment Fees



# FUNDS & OTHER PLANNED GIFTS

## DEDICATED TO SUSTAINABILITY

Catholics across the Archdiocese of St. Louis have been engaged in the All Things New planning initiative for a year now. It's a time of prayer, a time of change, a time of uncertainty, and yet also a time for hope for the future.

The Roman Catholic Foundation will continue to do our work to help ensure the sustainability of parishes, schools, and ministries for future generations. As the decisions are made, we are proactively reaching out to individuals and institutions to keep them apprised as to how it impacts their gifts.

All Things New will reshape and prepare the Archdiocese to evangelize and serve future generations in St. Louis. The Roman Catholic Foundation will continue its work as a trusted partner invested in providing Catholic planned giving options to help the faithful to strengthen and sustain the local Church for the future.



## ENDOWMENT FUNDS

### **Al J. Bushman Memorial Scholarship Endowment Fund**

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

### **All Souls Catholic Church Endowment Fund**

All Souls Church (Overland, MO)

### **Annual Catholic Appeal Endowment Fund**

Archdiocese of St. Louis

### **Annunciation Catholic Church Endowment Fund**

Annunciation Church (Webster Groves, MO)

### **Anonymous Endowment Fund**

Multiple

### **Archbishop Mitchell Rozanski Endowment Fund**

Priests' Mutual Benefit Society (Archdiocese of St. Louis)

### **Archbishop Robert J. Carlson Endowment Fund**

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

### **Assumption Catholic Church (Mattese) Education Fund**

Assumption (Mattese) Church (St. Louis, MO)

### **Assumption Catholic Church (Mattese) Endowment Fund**

Assumption (Mattese) Church (St. Louis, MO)

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

Assumption Church (O'Fallon)

### **Beyond Sunday Education Endowment Fund**

Catholic elementary and secondary schools (Archdiocese of St. Louis)

### **Cadet Thomas Surdyke 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 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)

### **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. Francis Cabrini Academy (St. Louis, MO)

### **Elmer L. & Julia O. Unnerstall Memorial Scholarship Fund**

St. Francis Borgia Regional High School (Washington, MO)

### **Epiphany of Our Lord Catholic Church Endowment Fund**

Epiphany of Our Lord Church (St. Louis, MO)

### **Eugene A. and Mary Kathleen Hanneke Scholarship Endowment Fund**

Kenrick-Glennon Seminary (St. Louis, MO)

### **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)

### **Gloria Schraut Endowment Fund**

St. Joseph Church (Imperial, MO) and St. Pius High School (Imperial, MO)

### **ICOM Cemetery Endowment Fund**

Immaculate Conception Church Cemetery (Old Monroe, MO)

### **Immaculate Conception Catholic Church Endowment Fund**

Immaculate Conception Church (Dardenne Prairie, MO)

### **Immaculate Conception Parish and Cemeteries Endowment Fund**

Immaculate Conception Parish & Cemetery (Park Hills, 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)

### **Jacqueline D. Post Miller Memorial Endowment Fund**

St. Francis Borgia Regional High School (Washington, MO)

### **John and Marilyn Kluesner Endowment Fund**

Cardinal Glennon Children's Foundation (St. Louis, MO) and St. Francis Borgia Regional High School (Washington, MO)

### **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)

# FUNDS & OTHER PLANNED GIFTS

## ENDOWMENT FUNDS CONTINUED

### Latin America Apostolate Endowment Fund

Latin America Apostolate (St. Louis, MO)

### Leo T. Holzem Memorial Scholarship Endowment Fund

St. Francis Borgia Regional High School (Washington, MO)

### Loretta & Linus Glosemeyer Memorial Endowment Fund

St. Ignatius of Loyola School (Marthasville, MO)

### Lynn Ryan Endowment Fund

Beyond Sunday Educational Endowment, ACA/Perpetual Light Society Endowment (St. Louis, MO)  
St. Dominic Scholarship Endowment (O'Fallon, MO)

### M. Rosalie Fusz Endowment Fund

Archdiocese of St. Louis

### 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 & Richelle Weisbrod Memorial Endowment Fund

Cathedral Basilica of St. Louis, St. Louis Cathedral Concerts and Beyond Sunday Endowment Fund (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)

### Monsignor John M. Costello Special People in Catholic Education (SPICE) Endowment Fund

St. Peter Church (Kirkwood, MO)

### 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)

### Rural Parish Clinic Endowment Fund

Rural Parish Clinic (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)

### Sandra J. Kanik Scholarship Endowment Fund

St. Joseph Elementary School (Imperial, 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)



## 39 Testamentary Intentions Valued at \$30M

### Most Sacred Heart Catholic Parish – Eureka Endowment Fund

Most Sacred Heart Church (Eureka, MO)

### One Classroom Endowment Fund

One Classroom (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 Catholic Church (St. Louis, MO)

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

St. Francis Borgia Church Elementary School (Washington, MO)

### 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)

### Reverend James T. Edwards Memorial Endowment Fund

PMBS and Regina Cleri (Archdiocese of St. Louis)

### Reverend Timothy M. Foley Endowment Fund

Society for the Propagation of the Faith and Peace and Justice Commission (Archdiocese of St. Louis)

### 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 (St. Louis, 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 Catholic Church (St. Louis, MO)

### St. Francis Borgia Church (Washington, MO) Endowment Fund

St. Francis Borgia Catholic Church (Washington, MO)

### St. Francis Borgia High School (Washington, MO) Endowment Fund

St. Francis Borgia Regional High School (Washington, 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. Joseph (Apple Creek) and St. Michael (Apple Creek) Cemeteries Endowment Fund

St. Joseph Church (Apple Creek, MO)

### St. Joseph Catholic Church (Apple Creek) Endowment Fund

St. Joseph Church (Apple Creek, 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)

## ENDOWMENT FUNDS CONTINUED

### St. Margaret Mary Alacoque Parish School Endowment Fund

St. Margaret Mary Alacoque School (St. Louis, MO)

### St. Margaret of Scotland Catholic Church Endowment Fund

St. Margaret of Scotland Church (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 (Biehle) Cemetery Endowment Fund

St. Maurus (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 Catholic Parish Endowment Fund

St. Theodore Church (Wentzville, MO)



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## Benefiting Organizations

## LONG-TERM FUNDS

### Ascension Catholic Church Fund

Ascension Church (Chesterfield, MO)

### Beckmann Family Fund

St. Anselm Church (St. Louis, MO)

### Conoyer Family Scholarship Fund

Duchesne High School (St. Charles, MO)

### Faithful Catholic Families Scholarship Fund

Multiple schools within the Archdiocese of St. Louis (Archdiocese of St. Louis)

### Rosario Gasquet Memorial Fund

St. Austin School (Chesterfield, MO)

### ICOM Long-Term Fund

Immaculate Conception Church (Old Monroe, MO)



# \$72.2M Cumulative Grants and Distributions

### 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)

### Ste. Genevieve Catholic Church Endowment Fund

Ste. Genevieve Church (Ste. 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 Szwabo Memorial Scholarship Endowment Fund

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

### Trinity Catholic High School Endowment Fund

Cardinal Ritter College Prep (St. Louis, MO)

### Virginia Celeste Piontek Memorial Scholarship Endowment Fund

Pontifical Paul VI Institute (St. Louis, MO)

### Vision of Peace Hermitages Endowment Fund

Vision of Peace Hermitages (Pevely, MO)

### Washington University Catholic Student Center Endowment Fund

Washington University Catholic Student Center (St. Louis, 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)

### Louis and Maude Riegel Family Memorial Fund

St. James the Greater Church (St. Louis, MO)

### Roman Catholic Foundation Fund

Roman Catholic Foundation (St. Louis, MO)

### SOAR! Scholarship Fund

Select North County and St. Louis City Catholic schools (Archdiocese of St. Louis)

### St. Agatha Center Long-Term Fund

St. Agatha Center (St. Louis, MO)

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

St. Margaret Mary Alacoque School (Oakville, MO)

# FUNDS & OTHER PLANNED GIFTS

## DONOR-ADVISED FUNDS

Anonymous (12)  
Baalmann Family Charitable Fund  
Baranowski Family Charitable Fund  
Charles Family Donor-Advised Fund  
Peter and Beverly Danis Donor-Advised Fund  
Mike and Brenda Dempsey Charitable Fund  
George B. Desloge Family Charitable Fund  
Jason and Christina Duepner Donor-Advised Fund  
Mark and Dolores Fain Donor-Advised Fund  
Footwear Unlimited Donor-Advised Fund  
Con Franey and Stephanie Re Donor-Advised Fund  
John and Rosemary Gorrell Memorial Fund  
H. Wayne and Cynthia L. Groner Donor-Advised Fund  
Joan and Mark Guyol Family Donor-Advised Fund  
Michael J. Heck Family Charitable Fund  
Gerard and Jennifer Hempstead Family Charitable Fund  
Daniel and Staci Huth Donor-Advised Fund  
Raymond Kreienkamp and Dr. Patricia Amato Donor-Advised Fund  
Joan and Joseph Lipic Donor-Advised Fund  
Reverend Michael J. Lydon Donor-Advised Fund  
Robinson Family Donor-Advised Fund  
Ross Family Donor-Advised Fund  
Sacred Heart Donor-Advised Fund

## CHARITABLE GIFT ANNUITIES

**Anonymous (2)**  
All Souls Catholic Church (Overland, MO)  
**Anonymous**  
Assumption (Mattese) Church (St. Louis, MO)  
**Anonymous**  
Catholic Charities of St. Louis (St. Louis, MO)  
**Anonymous**  
Daily Worldmissionaries  
**Anonymous**  
Michael P. McMillan Scholarship Endowment Fund  
**Anonymous**  
Our Lady of Lourdes Church (Washington, MO)  
**Anonymous**  
Our Lady of Lourdes Church (Washington, MO)  
**Anonymous**  
St. Francis Borgia Regional High School (Washington, MO)  
**Anonymous**  
St. Francis Borgia Church (Washington, MO)  
**Anonymous**  
St. Francis Borgia Regional High School (Washington, MO)  
**Anonymous**  
St. Francis Borgia Church (Washington, MO)  
**Anonymous**  
St. Joseph Church (Apple Creek, MO)  
**Anonymous**  
St. Mary Magdalen (Brentwood, MO)  
**Anonymous**  
St. Vincent de Paul Catholic Church – Perryville Endowment Fund (Perryville, MO)



**\$54M** Total Assets Under Management

Molly M. and Douglas G. Sansone Donor-Advised Fund  
Timothy and Susan Sansone Family Donor-Advised Fund  
Don and Deby Schlaprizzi Family Donor-Advised Fund  
James and Karen Shaughnessy Family Charitable Fund  
Joseph and Rosemary Shaughnessy Fund  
Perry and Mary Simeroth Donor-Advised Fund  
Terry & Patty Smith Charitable Fund  
James and Jacquelyn Spellmeyer Donor-Advised Fund  
St. Martha Giving Circle of the Roman Catholic Foundation  
Reverend Robert J. Suit Donor-Advised Fund  
The St. Charles Group Foundation  
Steve and Donna Thielker Charitable Fund  
Tim and Kathy Thompson Charitable Giving Account  
Tracy Family Fund  
Lisa L. and Michael W. Walsh Donor-Advised Fund

**Rev. Msgr. Francis Blood**  
Annual Catholic Appeal/Perpetual Light Society (St. Louis, MO)  
**Msgr. Jerome Buchheit\***  
Retired Archdiocesan Priests' Endowment Fund (St. Louis, MO)  
**Mark Hanneke**  
Catholic Charities of St. Louis (St. Louis, MO)  
**Leonard Knobbe\***  
St. Mary's High School (St. Louis, MO)  
**Leonard Knobbe\***  
Washington University Catholic Student Center (St. Louis, MO)  
**Rev. Ronald Rubbelke (2)**  
Latin America Apostolate & Retired Archdiocesan Priests (St. Louis, MO)  
**Rev. Harold Voelker (6)**  
Retired Archdiocesan Priests' Endowment Fund (St. Louis, MO)  
**Rev. Msgr. Michael Witt**  
Kenrick-Glennon Seminary & All Saints Church (University City, MO)

## CHARITABLE REMAINDER TRUST

**Anonymous**  
Anonymous Endowment Fund (Archdiocese of St. Louis)  
**Anonymous**  
Today and Tomorrow Educational Foundation (Archdiocese of St. Louis)



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Gifts Totaling Over \$30M  
Benefiting 65 Organizations

## TESTAMENTARY GIFT INTENTIONS

Anonymous (35)  
 Annual Catholic Appeal St. Louis, MO (11)  
 Archbishop Robert J. Carlson Endowment Fund St. Louis, MO (1)  
 Association of the Miraculous Medal Perryville, MO (1)  
 Beyond Sunday Educational Endowment, St. Louis, MO (4)  
 Birthright Counseling of St. Louis St. Louis, MO (2)  
 Bishop DuBourg High School St. Louis, MO (1)  
 Cardinal Ritter Senior Services St. Louis, MO (1)  
 Carmelite Sisters of the Divine Heart of Jesus St. Louis, MO (2)  
 Cathedral Basilica of St. Louis St. Louis, MO (3)  
 Catholic Charities of St. Louis St. Louis, MO (8)  
 Cedar Lake Foundation Foristell, MO (1)  
 Christian Brothers College High School St. Louis, MO (1)  
 Covenant House Missouri St. Louis, MO (1)  
 Covenant Radio St. Louis, MO (2)  
 DeSmet Jesuit High School St. Louis, MO (1)  
 Holy Cross Academy, St. Michael the Archangel Campus St. Louis, MO (1)  
 Holy Trinity Catholic Church St. Ann, MO (1)  
 Immaculate Conception Church Cemetery Old Monroe, MO (1)  
 Incarnate Word Academy Normandy, MO (1)  
 Incarnate Word Catholic Church Chesterfield, MO (1)  
 Incarnate Word Parish School Chesterfield, MO (1)  
 Kenrick-Glennon Seminary St. Louis, MO (7)  
 Life Teen International, Inc. (1)  
 Mt. Grace Convent (Pink Sisters) St. Louis, MO (1)  
 National Shrine of St. Joseph and Friends St. Louis, MO (1)  
 Our Lady's Inn St. Louis, MO (2)  
 Priests Mutual Benefit Society St. Louis, MO (2)  
 Regina Cleri St. Louis, MO (1)  
 Respect Life Apostolate St. Louis, MO (2)  
 Retired Archdiocesan Priests St. Louis, MO (2)  
 Roman Catholic Foundation St. Louis, MO (2)  
 Rural Parish Workers of Christ the King Cadet, MO (1)  
 Rural Parish Workers of Christ the King Fertile, MO (1)  
 Seven Holy Founders Catholic Church St. Louis, MO (1)  
 Society of St. Vincent de Paul Perryville, MO (1)

Society of the Propagation of the Faith and Peace and Justice Commission (2)  
 St. Charles Lwanga Center St. Louis, MO (1)  
 St. Elizabeth, Mother of John the Baptist Catholic Church St. Louis, MO (1)  
 St. Francis Borgia Cemetery Washington, MO (2)  
 St. Francis Borgia Church Elementary School Washington, MO (2)  
 St. Frances Cabrini Academy St. Louis, MO (1)  
 St. Francis Community Services St. Louis, MO (1)  
 St. Francis of Assisi Oakville, MO (1)  
 St. Francis of Assisi Parish Portage Des Sioux, MO (1)  
 St. Gabriel Catholic Church St. Louis, MO (1)  
 St. John the Apostle and Evangelist Catholic Church St. Louis, MO (1)  
 St. Joseph Catholic Church Wentzville, MO (1)  
 St. Joseph Church Imperial, MO (1)  
 St. Justin Martyr Church St. Louis, MO (1)  
 St. Louis University St. Louis, MO (1)  
 St. Michael the Archangel Parish St. Louis, MO (1)  
 St. Patrick Center St. Louis, MO (1)  
 St. Paul Catholic Church & St. Paul Catholic Cemetery Berger, MO (1)  
 St. Pius X High School Festus, MO (1)  
 St. Stephen Catholic Church Richwoods, MO (1)  
 St. Vincent de Paul Church Perryville, MO (1)  
 St. Vincent de Paul Parish Elementary School Dutzow, MO (2)  
 St. Vincent de Paul Society Festus District (1)  
 St. Vincent de Paul Archdiocesan Council of St. Louis St. Louis, MO (2)  
 St. Vincent Education Foundation Perryville, MO (1)  
 The Carmelite Sisters of St. Joseph St. Louis, MO (1)  
 The School Sisters of Notre Dame Central Pacific Province (1)  
 Vision of Peace Hermitages Pevely, MO (3)  
 Visitation Academy St. Louis, MO (1)  
 White House Retreat St. Louis, MO (2)  
 Joan Steffan O'Reilly\*  
 Roman Catholic Foundation (St. Louis, MO)  
 Mary Riegel\*  
 St. James the Greater Church (St. Louis, MO)  
 Helen Sloan\*  
 St. Charles Lwanga Center (St. Louis, MO)  
 Gloria Schraut\*  
 St. Joseph Church (Imperial, MO) and St. Pius High School (Imperial, MO)

\*Deceased



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Funds Established/  
Other Planned Gifts

## A LETTER FROM OUR BOARD

Dear Friends,

It has been ten years since Archbishop Emeritus Carlson commissioned a Task Force to evaluate the creation of a Foundation “to help better coordinate ALL the fundraising in our parishes, schools, and all the other life-giving ministries and programs throughout the Archdiocese.” This exciting endeavor sought to actively engage Christ’s faithful in new ways, to empower people with a sense of ownership in the mission of the Foundation, and to ensure the future of schools and other vital missions that change lives throughout our Archdiocese. All of this would only be possible with a high level of professional expertise delivered in a donor-centric construct.



As we approach the tenth anniversary of our formation as a non-profit organization, we look back on the ways the Roman Catholic Foundation has helped to shape our community. The RCF successfully executed the Beyond Sunday campaign, raising more than \$100 million, which allowed the RCF to return \$44.3 million to parishes, endow \$31.5 million for future scholarships, and award \$16.3 million in scholarship funds and \$3.1 million in grants to Catholic schools for innovative and transformative projects. The RCF has given \$72.2 million in cumulative distributions and stewards an additional \$30 million in future testamentary gift intentions to benefit 66 Archdiocesan parishes, schools, and ministries.



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“It has been my privilege to step into Mark Guyol’s shoes as he transitioned into a well-deserved retirement. His zeal for the mission and historical knowledge have been invaluable as a confidant and advisor during my first year. I am surrounded by an engaged and passionately Catholic staff and Board of Trustees. As we enter into 2023, all at the Foundation are prepared to assist the donors and the Archdiocese through the historical changes that lie before us with All Things New.” – *Joe Bestgen, President & CEO*

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The Board of Trustees and staff have worked tirelessly to achieve the original goals of the task force and will continue to do so for many years to come. Taking a moment to consider all the lives impacted in our community, we are astounded! The generosity of each of you who have supported this new way of thinking about giving inspires us every day. It shows such leadership and vision in securing the future of so many important institutions. This strong track record gives us confidence as we prepare to work closely with parishes, schools, ministries, and faithful individuals in the Archdiocese as we navigate the All Things New initiative to ensure that the intentions of all donors will be honored. There are challenges ahead, but with the grace of God, and this dynamic coalition invested in keeping our Catholic faith alive for generations to come, we are confident that the Roman Catholic Foundation will continue to proclaim the glory of God. Thank you for your generosity, leadership, partnership, and vision in this important work.

Sincerely,

A handwritten signature in black ink that reads "Nancy Ross Don Ross". The signature is written in a cursive, flowing style.

Nancy and Don Ross, Board Co-Chairs

# ROMAN CATHOLIC FOUNDATION MEMBERS

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Most Reverend  
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\*Deceased

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Andrea Sharp  
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Mark Guyol, M.B.A.  
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## ACCREDITATIONS

The Roman Catholic Foundation has  
received the following recognition:





Roman Catholic Foundation  
of  
EASTERN MISSOURI

425 North New Ballas Road, Suite 200  
St. Louis, MO 63141

314.918.2890 | [rcfstl.org](http://rcfstl.org)

*Plan with Heart.  
Invest for Good.*

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