

THE ROMAN CATHOLIC FOUNDATION OF EASTERN MISSOURI

COMMUNITY 20 IMPACT REPORT 23

Strengthening Our Catholic Community

FORMING
FUTURE
LEADERS

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Roman Catholic Foundation
of
EASTERN MISSOURI

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See our 2024-2025 calendar!

A DECENNIAL MILESTONE OF FAITH & STEWARDSHIP

A Shared Vision of Faith & Hope

This year marks ten years since the Roman Catholic Foundation became an independent 501c3 organization established to support the parishes, schools, and ministries of Eastern Missouri.

Archbishop Robert Carlson led the Archdiocese of St. Louis at the time and had experience with similar foundations in other dioceses where he served. "When I was transferred to Sioux Falls, I was installed in February, and in March, they told me we were out of money! We got the idea that we needed another resource." Thankfully, there was no immediate financial crisis upon his arrival in St. Louis years later. Still, his years of leadership had shown him that preventing the problem in the first place would benefit everyone.

While the Archdiocese of St. Louis has a long tradition of stewarding the generous contributions of donors for both annual and special campaigns, Archbishop Carlson's experience in other dioceses showed him the benefit of having a separate organization established that would exclusively focus on planned giving to provide excellent service to individual donors as well as stewarding endowments and other planned gifts on behalf of the parishes, schools, and ministries around the Archdiocese. Archbishop Carlson believed this separation was necessary so that "funds are protected and separate from the Archdiocese so that when people give generously, they know those funds will be there in perpetuity."

Beyond Sunday was the first major initiative the newly assembled staff and Board of Trustees undertook. Archbishop Carlson wanted to encourage priests and parishioners to look beyond the Sunday collection and think about the more extensive needs of their parishes and schools and how to secure those long-term. "I told them I thought we needed to raise about \$100 million, and they looked at me like I was crazy!" he recalls. "People said I couldn't do it, but I said humor me and let me try." Ultimately, the campaign raised more than \$100 million. As parishes and organizations around the Archdiocese began to see the fruits of the work of the

Foundation, Archbishop Carlson observed that "people began to say, 'oh, this is something that isn't just going to be run by the Archbishop and what he wants,' but rather it was going to be protected, cared for, and overseen."



Upon his arrival in St. Louis in 2020, Archbishop Rozanski was immediately impressed with the Foundation's resources available to individual donors and to the benefitting parishes, schools, and ministries. In particular, he appreciated that the Foundation had the foresight to establish scholarship funds for students from middle-class families to make high-quality Catholic education available for everyone.

Archbishop Rozanski sees the planned giving resources offered by the Roman Catholic Foundation as a blessing for priests and leaders of schools and ministries. "If we're going to be present in every community, at church, school, Catholic charities, and all the different ways in which we minister in the name of Christ, the Roman Catholic Foundation really helps us to be a constant presence," he said. "It's a big help to our pastors and schools, and leaders of organizations that outreach in the name of Christ."

While the types and sizes of gifts stewarded by the Foundation are widely varied, the uniting factor behind all of them is faith in Jesus Christ and a desire to do his will as a Church. Archbishop Rozanski recognized that the staff and board who do the work of the Foundation "are people of deep faith. They believe in what our Catholic Church believes and does, and that's evident in how they live their lives and in the way they're stewards for our people of the funds of the Roman Catholic Foundation."

Archbishop Rozanski encourages a hope-filled vision for the future, supported by the work of the Roman Catholic Foundation. "Each of us can have an impact. No matter how small or large that impact is, it's still an impact in contributing to the mission of the Church."

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



AN EXCLUSIVE DISCUSSION: The Roman Catholic Foundation had the incredible opportunity to sit down with both Archbishop Emeritus Carlson and Archbishop Rozanski at the Archbishop's residence to talk about the work of the Roman Catholic Foundation. These two visionary leaders discussed the inspiring roots of the Foundation, the exciting prospects for the future, and how the faith-filled work of the Foundation is essential to the future of our parishes, schools, and ministries. Please scan this code or visit bit.ly/RCF-Archbishops to view and share this historic conversation.

SCAN TO WATCH!



THE ROMAN CATHOLIC FOUNDATION CELEBRATES 10 YEARS

Transition Reflects Strong Lay Leadership

During the 10th anniversary year of the Roman Catholic Foundation, the leadership of the Board of Trustees will transition for the first time. Don and Nancy Ross recall being invited to Mass and breakfast by then-Archbishop Robert Carlson back in 2012, not knowing what he had in mind. They learned that he was asking them to become the founding chairs of what would become the Roman Catholic Foundation.

Mark Guyol received a similar invitation shortly after and said, in hindsight, "Don't accept an invitation to Mass and breakfast with the Archbishop unless you're prepared to say yes to something!" Coming from a successful career in the corporate world, Mark felt

began in 2015, and the leadership visited parishes all over Eastern Missouri. "We went to some parishes I hadn't heard of, and the people who came were so enthusiastic," recalled Nancy, illustrating the people's shared faith and common sense of mission, regardless of location.

Don acknowledged that the goal of Beyond Sunday was ambitious. "It was a significant amount of money to raise, but would immediately return \$40 million to the parishes." He believes this historic campaign, with immediate results, showed donors and leaders the impact this Foundation could have on the community. As the scholarship programs grew, Don appreciated hearing



unqualified to take on such a monumental task. "I was very clear with Archbishop Carlson, Don, and Nancy: you're hiring a coffee salesman! I didn't have any experience with philanthropy, but it's all about relationships." He took his business experience, ability to build relationships, and in particular, his faith and started to make the Foundation a reality.

The relationships and connections grew quickly as the Beyond Sunday campaign

stories about families who were able to send their children to Catholic schools. "It makes you feel good to be a part of something and make an opportunity available," he said.

After leading Beyond Sunday and establishing many other successful programs, Mark discerned that it was time to retire as President and CEO in 2022. Don and Nancy never envisioned remaining Board Chairs for ten years. Still, they wanted



Pictured left to right: Don and Nancy Ross, Joe Bestgen, Joan and Mark Guyol

to ensure they could support Mark and his successor, Joe Bestgen, through the transition process. With Joe having successfully led the Foundation for over two years, they felt it was time to step back. Though Mark and his wife, Joan, were enjoying their retirement, the call to serve remained strong. They became Foundation board members, and now, with Don and Nancy leaving the board, they are filling the role of board chairs.

Don praised the Guyols' experience and dedication to the Foundation, saying, "This probably will be the smoothest transition any organization has ever had!" Mark has equally high regard for Don and Nancy. "Their commitment level and the term of their commitment is incredible," he said.

Foundation President and CEO Joe Bestgen praises both couples for their faith-filled leadership. Their shared focus "is all about how we want the Foundation to succeed, no matter who's involved. You just don't see that in every organization," he said, giving him hope for steady continuity throughout the time of transition.

As these couples have worked to build the Foundation, they

have also practiced planned giving in their own lives for deeply personal reasons.

"The Church is a big part of who we are and how we grew up," noted Joan. "It's the fabric of our lives," added Mark. The Guyols heard advice from Archbishop Carlson years ago to consider the Church as a member of their family when making estate planning decisions. In deciding to put that into practice for their own family, to provide for their descendants as well as the faith-based institutions that have been so important to them, Mark hopes that their children "see it, experience it, and that we live it – and that becomes their model as well."

These remarkable couples have inspired countless others to provide for the future of the Church. "People all down deep want to do something," said Don, and he believes the Roman Catholic Foundation makes the planned giving process easier for both donors and the benefiting organizations.

The Roman Catholic Foundation is blessed by the leadership of Don, Nancy, Mark, and Joan. Their humble service will impact our community for generations to come.

FORMING CATHOLIC LEADERS FOR THE FUTURE



Beyond Sunday High School Fellows Program

The Beyond Sunday High School Fellows program provides faith and leadership experiences that help high school students live their faith proudly today and as they discern their future vocations. One requirement for applying for the Beyond Sunday High School scholarship is to submit an essay describing how this opportunity would positively affect them, their walk with God, and their faith. The selected students, referred to as Fellows, receive financial assistance toward their Catholic high school tuition.

These students participate in both a spring and a fall event each year. A core objective of the Beyond Sunday Fellows Program is to build fellowship among Catholic high school students while serving the community, which is a concrete and visible way of putting their faith in action in the service of others.

In the spring of 2023, the Fellows were given the option of helping to restore the Old St. Ferdinand's Shrine after flooding damage or being a buddy for St. Louis Challengers Baseball, a league for people with disabilities.



In the fall of 2023, a Mass was held with Archbishop Rozanski, followed by lunch and a leadership panel in the afternoon. The panel consisted of Fr. Augustine Wetta, OSB, and Sr. Mariana Joy, DCJ, who led the Fellows through a discussion on discerning God's vocation to the single, married, or religious life.

Fulfilling the Final Wishes of a Faithful Servant



For Fr. James T. (Jim) Edwards, faith was the center of his existence. Born in St. Louis, he attended St. Louis Preparatory Seminary South, Cardinal Glennon College, and Kenrick Seminary. He was ordained to the priesthood in 1976 by Cardinal John J. Carberry and served as associate pastor of St. Charles Borromeo Parish in St. Charles.

He then served as associate pastor of St. George Parish in Affton, St. Clement Parish in Des Peres, and St. Ann Parish in Normandy.

Fr. Edwards later served as pastor of St. Ann Parish and then as pastor of St. Elizabeth of Hungary Parish in Crestwood.

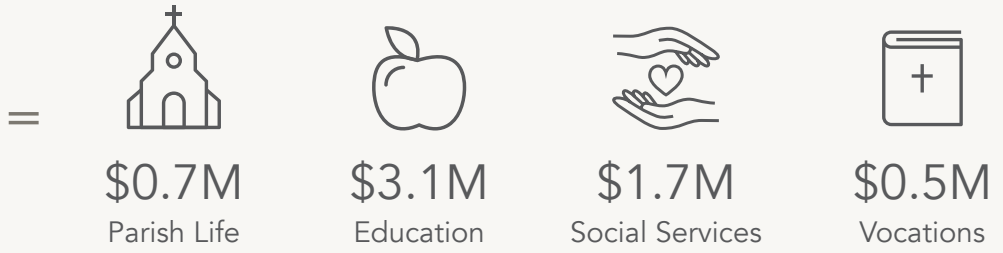
In 2009, Fr. Edwards retired due to health issues. Despite his retirement, his passion for the Church and involvement did not waver. He served as the spiritual director of the Archdiocese's Office of Apostolic Services throughout this time.

Fr. Edwards died on May 13, 2020, at the age of sixty-nine. He lived and died by his faith. His sister, Jeanne Hevesy, shared, "In February 2020, Jim told me I was to inherit his estate. He said he was very grateful to the Archdiocese of St. Louis for supporting him in his vocation and continuing to support him throughout his retirement. He asked me to take care of Regina Cleri (the Archdiocesan retirement home for clergy) and the Priest Mutual Benefit Society (PMBS), which provides retired clergy with their retirement income, as they were of great importance to him."

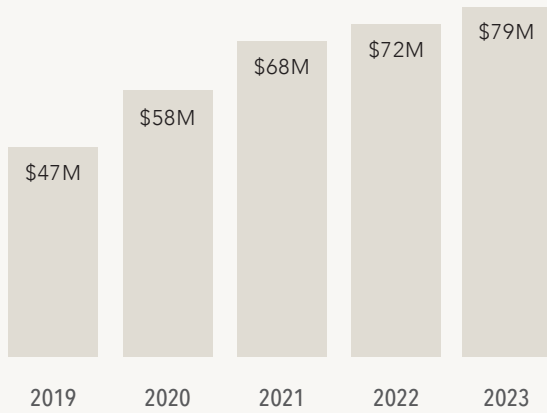
As his named beneficiary, Jeanne was legally entitled to all his assets. Like her brother, she believes in doing what is right and honorable. She fulfilled his wishes by creating and funding the Reverend James T. Edwards Memorial Endowment Fund, which provides ongoing support to both Regina Cleri and the PMBS.

The Roman Catholic Foundation made this process easy for Jeanne as she dealt with the details of her brother's estate. As a result, the generosity of Fr. Edwards and Jeanne will help allow his fellow priests to have a secure and comfortable retirement for years to come, continuing his legacy of a faith-filled vocation.

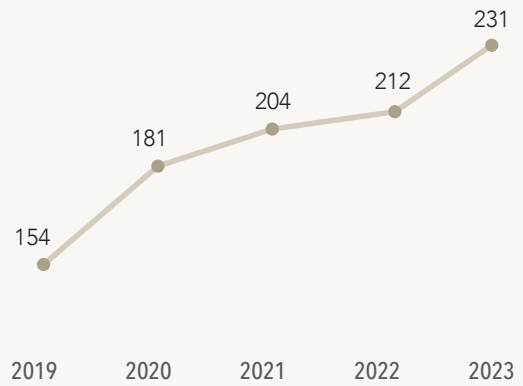
GRANTS & DISTRIBUTIONS



Cumulative Grant Distributions

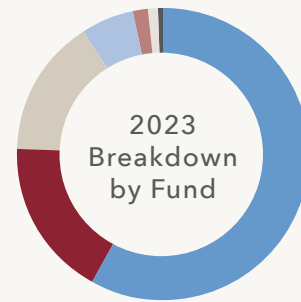
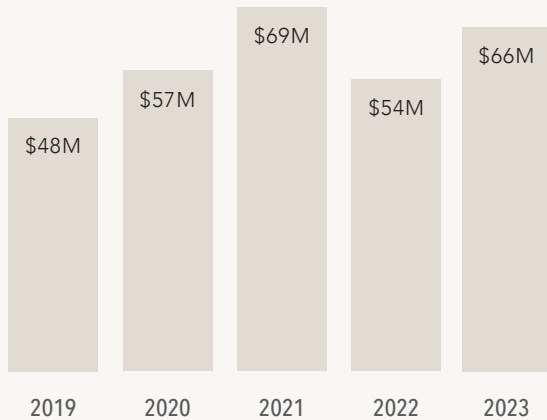


Cumulative Number of Funds



ASSETS UNDER MANAGEMENT

Cumulative Growth by Year



- Beyond Sunday Education Endowment.....58.3%
- Endowment Funds – All Others17.3%
- Donor-Advised Funds15.3%
- Long-Term (Unendowed) Funds6.0%
- Charitable Remainder Trusts1.7%
- Charitable Gift Annuities1.0%
- Charitable Gift Annuities – Agency0.4%

SECURING THE FUTURE for Special Children

Msgr. Jack Costello, known as Fr. Jack, believed that every child should be able to enjoy the benefits of a Catholic education and worked to make that dream a reality. Fr. Jack had been a life-long proponent of quality Catholic education. In 2016, the National Catholic Educational Association recognized him for his contributions to Catholic education with the "Lead. Learn. Proclaim. Award." Therefore, it was no surprise that he diligently explored the burning issue of Catholic education for all and identified the key components to make his vision a reality. When he presented the plan to his parish, St. Peter in Kirkwood, they unanimously agreed that this was "doable" and promptly began working to bring the vision to life.

In June 2020, Fr. Jack proudly announced that a new endowment fund, initially called the SPICE (Special People In Catholic Education) Fund, had been created through the Roman Catholic Foundation. The parish loved Fr. Jack and has supported this new fund through personal gifts and fundraisers.

The fund provides St. Peter Elementary School with resources to train teachers to understand the needs of special students, hire tutors to provide the students with the extra attention they need to stay current with their class, and the resources needed to bring OT and PT experts in to work with the students.

"The SPICE Program at St. Peter, which Fr. Jack started, has significantly contributed to enhancing the academic excellence

at our school. The students receive speech therapy, tutoring, and other academic assistance to help them excel in the classroom. In addition, our faculty have access to resources and training to help educate students with learning needs," said Kevin Stillman, Director of Finance of Operations and St. Peter Catholic Church.



Fr. Jack's target was to see the fund reach a value of \$1,000,000. Sadly, he left this world on March 27, 2022, after a valiant battle with cancer. As a testament to his service and their love for him, the parishioners of St. Peter renamed the fund in honor of him the Monsignor John M. Costello Special People In Catholic Education (SPICE) Endowment Fund. The fund has grown to a market value of \$113,525 as of December 31, 2023, and will continue to grow with ongoing gifts and investments.

Fr. Jack identified a need to serve God's people in a way that was close to his heart. The Roman Catholic Foundation helped him turn his vision into reality, and now that vision will impact generations of students and families.

CHARITABLE GIFT ANNUITY: Give a Gift & Receive Income

Did you know there is a way to support the Catholic organizations you love while also receiving a guaranteed fixed-income stream for life?

EXAMPLE 1: If you **fund your Charitable Gift Annuity with cash or taxable assets** such as highly appreciated stocks or real estate, you will bypass capital gains taxes and receive a Charitable Deduction for a portion of your gift amount. You will receive a guaranteed lifetime of fixed annuity payments, which will be partially tax-free, all while making a meaningful gift to the organization(s) you love. Let's look at this example for Sally Smith (72):

\$50K CGA	\$18,431 charitable tax deduction	6.6% annuity percentage	\$3,300 annual payments	\$1,122 ordinary income	\$2,178 tax-free income	\$25K estimated gift to charity
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EXAMPLE 2: If you are over 70 ½ and **fund your Charitable Gift Annuity through a distribution from your IRA**, you can receive a one-time Qualified Charitable Distribution (QCD) of up to \$53,000, which ensures your distribution is not taxed as income. You will create a guaranteed lifetime of fixed annuity payments without paying taxes on your IRA distribution, all while supporting the organization(s) you love. Let's look at this example for Mary Miller (72):

\$50K CGA	6.6% annuity percentage	\$3,300 annual payments	\$3,300 ordinary income	\$0 tax-free income	\$25K estimated gift to charity
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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, 2023

Anonymous (54)
 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
 Mr. and Mrs. David J. Caruthers
 Daniel & Mary Charles
 Anne-Marie Clarke
 & Richard Gaines
 Helen Patricia Clendenin
 Michael & Carol Conoyer
 Barbara Conway
 Jennifer and Jim Cunnane
 Peter & Beverly Danis
 Michael & Brenda Dempsey
 Mary Rose Desloge
 Leonard* & Patricia Dino
 Mr. and Mrs. Charles L. Drury, Jr.
 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
 Reverend Bruce Forman
 Rick & Michele Forshaw
 Con Franey & Stephanie Re
 Niall & Gretchen Gannon
 Rich and Julie Gau
 John & Marilyn Gibbs
 Ralph* & Vikki Glosemeyer
 Jerel & Mary Grimaud
 Deacon H. Wayne
 & Cynthia Groner
 David & Sarah Gulick
 Mark & Joan Guyol
 Frank & Christine Guyol*
 Kathleen Haffner
 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
 Judy and Jerry Kent
 Shirley A. Schweigert Kist
 Mary Margaret Kleba
 John & Marilyn Kluesner
 Len & Helen Knobbe*
 Rev. Urban H. Knoll
 Norman Koelling
 Raymond Kopsky, Jr.
 Raymond Kreienkamp
 & Patricia Amato
 Linda Kurz
 Robert & Geraldine Lammert*
 Reverend Robert Lane*
 Kent LeVan
 Joseph & Joan Lipic
 Sheri L. Locher
 Michael & Laura Lueken
 Reverend Michael Lydon
 Robert & Nancy Macher
 Michael McMillan
 Jacqueline D. Miller*
 Thomas Monahan
 Michael & Rita Mooney
 Nancy Mueller
 Barbara Murray

Steve & Connie Notestine
 Reverend John Nuelle, M.S.
 Steve and Lisa Nuelle
 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
 Rev. Ronald J. Rubbelke
 Barbara Rubinelli*
 Lynn Ryan
 Michael Ryan
 Douglas & Molly Sansone
 Timothy & Susan Sansone
 Paul Schindler
 Don & Deby Schlappizzi
 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. Wuenscher
 Michael & Jeanne Zychinski
 *Deceased

ST. MARTHA GIVING CIRCLE

The St. Martha Giving Circle had another successful year in 2023 due to the generosity of its devoted members. Since its inception, the group has awarded \$45,000 each year to local organizations, for a combined total of \$90,000.

David and Diane Snively once again opened their beautiful home to the group in March, which also served as the year's inaugural event. The Incarnate Word Church Hall held The Marthas' next gathering, where 10 of the 19 nominated non-profit organizations came to speak about their charitable work. After the presentations, the Marthas voted on the organizations they would like to receive the funds, with grants ranging from \$3,000 to \$15,000.

The year's final event was a wine and cheese reception at the Archbishop's residence. This lovely evening allowed The Marthas to enjoy fellowship with one another while they reveled in their accomplishments.

The eight organizations that received financial gifts were:

- The Covering House*
- HumanKIND STL*
- Jesus in Disguise Ministry*
- Our Lady's Inn Maternity Homes*
- One Classroom*
- More Than Coffee*
- Good Shepherd Children & Family Services*
- Covenant House of Missouri*



ST. MARTHA GIVING CIRCLE
 THE ROMAN CATHOLIC FOUNDATION



If you are interested in joining the Marthas, scan this code or visit the web link below.

bit.ly/RCF-AR22-Marthas



HISTORIC CAMPAIGN PUTS FAITH IN ACTION


The Beyond Sunday campaign sunsetted at the end of 2023 as the most successful capital campaign in the Archdiocese of St. Louis's history. Thanks to the gifts of 25,500 Catholic families, more than \$100 million was raised. The funds will transform the Archdiocese of St. Louis, impacting Catholic education (60%) and local parish communities (40%).

To learn more about the Beyond Sunday High School Fellows program, including how to apply and how you can support this important effort, scan this code or visit bit.ly/BeyondSundayEndowment.

Beyond Sunday's Impact as of December 31, 2023

25,800 FAMILY PLEDGES

 **\$44.4M**
distributed to parishes

\$3.1M 
awarded in school grants

\$18M 
awarded in scholarships

\$38M 
endowed for Catholic education

ROSARIO GASQUET MEMORIAL FUND



The St. Austin School, a private Catholic elementary school, was founded in 2011. It operated on a shoestring budget, with only fifty-some students and a small faculty. The school wanted to provide a top-notch education to the students, but its financial situation limited its ability to do so.

Rosario Gasquet was particularly interested in the school's opening and immediately enrolled her granddaughter and three exchange students from Spain.

Feeling strongly that students should have the opportunity to learn other languages, Rosario volunteered to become the school's first Spanish teacher when she realized that, due to budget constraints, the school couldn't offer Spanish classes.

Originally from Peru, she volunteered for several years until the school had the resources to hire her as a paid faculty member. The impact Rosario had on her students was immeasurable. They not only learned Spanish, but her lessons gave them a first-hand glimpse into Peruvian culture. Sadly, she passed away in 2019. Though she is no longer with us, her memory and outreach inspired those she left behind.

As a person who truly lived her Catholic faith as a mentor, teacher, and friend, today she is beautifully memorialized through the "Rosario Gasquet Memorial Fund," started by a friend of The St. Austin School who understood the importance of her work. The fund provides resources to ensure that Spanish is continually an option for all kindergarten through eighth-grade students.

What impact have you, a friend, or a family member made on those around them? How can the Roman Catholic Foundation help you memorialize these works, whether they are still with us or have gone on to their Heavenly reward?



HELPING YOU EMBRACE THE EUCHARISTIC REVIVAL



A Call to Devotion and Unity

During this historic year for the Eucharistic Revival, we are invited to grow in our devotion to the presence of Jesus Christ in the Eucharist. This summer, a nationwide Eucharistic pilgrimage will culminate in the first National Eucharistic Congress in a generation. We invite you to save this calendar and display it throughout the year as a reminder of this significant time for our universal Church. Please note the days that we are particularly united in prayer as we work together to support the people of God through our beloved institutions and ministries.



bit.ly/EucharistSTL

“The revival is a beautiful invitation to grow in our living relationship with the Lord Jesus Christ in the Holy Eucharist, to experience his love and mercy, and to share that love and mercy with the world.” – Archbishop Rozanski

“In the humble signs of bread and wine, changed into his body and blood, Christ walks beside us as our strength and our food for the journey, and he enables us to become, for everyone, witnesses of hope.” – St. John Paul II

BE A PART OF THE REVIVAL. SCAN THE CODE TO LEARN MORE!

2024-2025 CALENDAR

MAY 9 The Ascension of the Lord

MAY 19 Pentecost Sunday

MAY 26 Solemnity of the Most Holy Trinity

MAY 31 Feast of the Visitation of the Blessed Virgin Mary

JUNE 2 Solemnity of the Most Holy Body and Blood of Christ

JUNE 7 Solemnity of the Sacred Heart of Jesus

JUNE 24 Solemnity of the Nativity of John the Baptist

JULY 4 Independence Day

JULY 5-7 National Eucharistic Pilgrimage, St. Louis Leg

JULY 17-21 National Eucharistic Congress (Indianapolis, IN)

AUG 15 Solemnity of the Assumption of the Blessed Virgin Mary*

AUG 24 Feast of St. Louis, King of France

NOV 1 Feast of All Saints Day*

NOV 2 Feast of All Souls Day

NOV 24 Feast of Christ the King

NOV 28 Thanksgiving

DEC 1 First Sunday in Advent

DEC 6 Feast of St. Nicholas

DEC 8 Solemnity of the Immaculate Conception of the Blessed Virgin Mary (observed December 9)

DEC 12 Feast of Our Lady of Guadalupe

DEC 16 Deadline to recommend grants for 2024 Donor-Advised Funds

DEC 25 Christmas Day*

DEC 27 Deadline for 2024 Wire Transfer, Stock, and Securities Contributions

DEC 29 Feast of the Holy Family

DEC 31 Deadline for 2024 Online and Postmarked Contributions

JAN 1 Solemnity of the Blessed Virgin Mary*

JAN 5 Solemnity of the Epiphany of the Lord

JAN 22 Day of Prayer for the Legal Protection of Unborn Children

FEB 2 Feast of the Presentation of the Lord

MAR 5 Ash Wednesday

MAR 19 Solemnity of St. Joseph

MAR 25 Solemnity of the Annunciation

APR 20 Easter Sunday

*Holy Day of Obligation

SPIRITUAL COMMUNION PRAYER

My Jesus, I believe that You are present in the Most Holy Sacrament.

I love You above all things, and I desire to receive You into my soul.

*Since I cannot at this moment receive You sacramentally,
come at least spiritually into my heart.*

I embrace You as if You were already there and unite myself wholly to You.

Never permit me to be separated from You. Amen.



Roman Catholic Foundation
of

EASTERN MISSOURI

RCFSTL.ORG

STATEMENT OF FINANCIAL POSITION

As of December 31, 2023	2023	2022
ASSETS		
Cash	\$1,041,729	\$1,093,684
Investments - At Fair Value	\$66,350,102	\$56,689,174
Promises to Give - Net	\$ -	\$144,549
Other Assets	\$482,172	\$531,811
Total Assets	\$67,874,003	\$58,459,218
LIABILITIES		
Accounts Payable and Accrued Liabilities	\$244,841	\$302,508
Funds Held for Others	\$1,438,414	\$1,580,729
Grants Payable	\$3,299,964	\$3,340,148
Beneficiary Endowments	\$4,127,267	\$3,380,168
Total Liabilities	\$9,110,486	\$8,603,553
NET ASSETS		
Without Donor Restriction	\$1,363,966	\$2,198,018
With Donor Restriction	\$57,399,551	\$47,657,647
Total Net Assets	\$58,763,517	\$49,855,665
Total Liabilities and Net Assets	\$67,874,003	\$58,459,218

STATEMENT OF FINANCIAL ACTIVITIES

As of December 31, 2023	2023	2022
REVENUE		
Total Contributions, Including Amounts Raised for Others	\$7,586,626	\$3,451,044
Less: Amounts Raised for Others	\$42,933	(\$319,118)
Less: Amounts Received for Beneficiary Endowments	\$325,933	(\$112,150)
Net Contributions	\$7,217,760	\$3,019,776
Other Income	\$207,538	\$265,393
Interest and Dividends	\$1,269,392	\$1,546,733
Investment Gains (Losses)*	\$6,528,099	(\$12,905,586)
Total Revenues	\$15,222,789	(\$8,073,684)
PROGRAM GRANTS		
Grants	\$5,374,615	\$4,734,587
Less: Grants Made on Behalf of Beneficiary Endowments	\$88,825	(\$51,607)
Total Grants	\$5,285,790	\$4,682,980
OPERATING EXPENSES		
Program	\$352,009	\$340,733
General and Administrative	\$456,118	\$473,535
Fundraising	\$221,020	(\$17,697)
Total Expense	\$1,029,147	\$796,571
Change in Net Assets	\$8,907,852	(\$13,553,235)
Beginning Net Assets	\$49,855,665	\$63,408,900
Ending Net Assets	\$58,763,517	\$49,855,665

*Net of Investment Fees

Caring for Christ's Servants: Continuing a Family Tradition

Eugene and Mary Kathleen Hanneke, known to their friends and family as Gene and Kathie, are also known as philanthropists. Their desire to generously serve and spread the gospel goes back many generations.

Kathie grew up in an interfaith household. Her mother was Catholic, and her father was the son of a Lutheran minister, but he agreed to raise their children Roman Catholic. Kathie took her religious upbringing from her mother but was inspired by her father's family's desire to give back to others. Kathie recalled that her grandfather lived through the difficulties of raising a family on a minister's salary and wanted to ensure other young people whose parents were ministers would not struggle to pay for education. Therefore, he

created a scholarship fund at a Lutheran college for those unable to afford their education expenses.

During the nearly fifty years since their wedding at St. Michael the Archangel Catholic Church, Kathie and Gene have been blessed with two sons and have supported one another through career changes and all the challenges of marriage and family life. Early in their marriage, they moved to Ballwin, where they were among the first parishioners of Holy Infant Catholic Church. Kathie and Gene remain very active today, giving most of their time to various programs in the parish.

Returning God's gifts is important to the Hannekes. As they considered how

they could share their faith with future generations, they decided to create the Eugene A. and Mary Kathleen Hanneke Scholarship Endowment Fund with the Roman Catholic Foundation. "Priests are essential to our faith and important to carry our faith on into the future," they said, noting the number of priests who have benefitted from other scholarship funds previously created for this purpose. They are so grateful that God has given them the resources to help others and felt that the endowment was a way to thank God for their good fortune.

Approximately 95% of our Archdiocesan priests are products of Catholic education. The first step is providing our young people with a solid base of Catholic



education and praying to the Holy Spirit that those with the calling will hear it and respond. The next step is providing each young man with the tools he needs to fulfill his calling. The Roman Catholic Foundation is proud to steward the gifts of people like Gene and Kathie, whose foresight and generosity will impact the Church for generations.

LEAVING A LEGACY THROUGH CHARITABLE GIFT ANNUITIES



As one of the longest-serving priests in the Archdiocese of St. Louis, Fr. Harold Voelker has many stories of his assignments in various parishes and his work with seminarians at Kenrick-Glennon Seminary. By no means boastful, he tells of his nearly 70 years of service to God and the Church with great reverence and humility.

Fr. Voelker grew up during the Great Depression, the only child of first-generation German parents. His parents did not expect the blessing of a child, so they were thrilled when he was born. Fr. Voelker knew at a young age that he wanted to serve God. Some families may have been conflicted, as their only descendant would not marry and not have the potential to carry the family name forward. However, when he told his parents he was planning to enter the seminary, they were pleased that God called their son to the priesthood.

Coming from a working-class environment, Fr. Voelker has never felt the need to indulge in worldly pleasures such as expensive clothes, extravagant trips, or new vehicles, choosing to live very modestly. Father said, "As priests, we are to serve

God's people, not only spiritually but financially as well. If we have more than enough to meet our needs, we should give it to those who are less fortunate."

Fr. Voelker resides at Our Lady of Life Apartments, a Cardinal Ritter Senior Services facility on the Cardinal Rigali Campus. He said he has the smallest room in the complex, which meets his needs perfectly! He feels blessed that the Archdiocese provides for his room and board, his medical needs, and almost anything else as necessary.

As a result, he finds that he has few personal expenses. As he builds funds in his bank account, he contacts the Roman Catholic Foundation to create another Charitable Gift Annuity (CGA.) He has consistently named the Retired Archdiocesan Priests' Endowment Fund at the Roman Catholic Foundation as the beneficiary of all his CGAs. This means that after his lifetime, all the funds remaining in his multiple CGAs will be added to the endowment fund he designated, continuing to provide retirement benefits for his fellow priests. He feels strongly that the Archdiocese provided him with all he needed for his entire career, even as a retired priest, and that it is now his personal duty to say "thank you" by ensuring future generations of priests have the same confidence of knowing that their retirement will be comfortable. The Roman Catholic Foundation is honored to be able to share in that mission of securing the care of our retired priests.

PRACTICING THOUGHTFUL GENEROSITY

With hearts open to the Holy Spirit, Steve and Donna Thielker have created an inspiring family legacy. As their family has grown throughout more than 40 years of marriage, they have continually increased their contributions to their community through charitable giving. They initially began giving to their parish, the Annual Catholic Appeal, and a few others. Over time, they found themselves on a myriad of mailing lists from charities of all types.

Their generous spirits prompted them to consider and carefully research the solicitations that resonated with them, studying each organization's mission and annual reports. As the years progressed, the number of organizations they supported grew. They both began to feel that their giving system was becoming overwhelming and began to pray that they would find a solution to ease the process. Steve and Donna read an article about Donor-Advised Funds (DAF) in a Roman Catholic Foundation newsletter. The couple inquired about the DAF and quickly realized that this was the answer to their prayers.

The Thielkers met with a Foundation professional and were quickly able to set up a DAF, transfer funds and begin their gifting. Steve and Donna have found many benefits to having a DAF with the Roman Catholic Foundation:

- 1 Setting up and making additional gifts to the fund was easy.
- 2 They receive a charitable deduction each year when they give a gift to the fund.
- 3 They no longer have to chase down the tax information each year they make a gift.
- 4 The DonorCentral system allows them to track their giving history easily.
- 5 They find comfort in knowing that the Foundation does a "deep dive" to research all organizations to whom a donor requests a distribution and will notify a donor if the organization does not align with Catholic values.
- 6 They greatly appreciate that the Foundation invests all funds in accordance with the United States Conference of Catholic Bishops Guidelines.
- 7 They can choose to make individual gifts anonymously or have their name attached to the gift.

The Thielkers did not stop with just the DAF; they also decided to make an ongoing difference to several of their favorite organizations after their lifetimes. To make this possible, they have created an Endowment Fund Estate Agreement, which they plan to fund with some of their assets after their lifetimes. The organizations named in the endowment will continue to receive annual distributions from their endowment in perpetuity.

The Thielkers truly have embraced the concept of selfless giving and are examples of how we all might choose to live our lives in service to God and the Church.



THANK YOU

to our generous donors and their families
for keeping our Catholic community strong!



FUNDS & OTHER PLANNED GIFTS

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 Catholic Church (Overland, MO)

Annual Catholic Appeal Endowment Fund

Archdiocese of St. Louis

Annunciation Catholic Church Endowment Fund

Annunciation Catholic Church (Webster Groves, MO)

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) Catholic Church (St. Louis, MO)

Friends of the Cathedral Basilica Endowment Fund

Cathedral Basilica of St. Louis (St. Louis, MO)

Gloria Schraut Endowment Fund

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

ICOM Cemetery Endowment Fund

Immaculate Conception Catholic Church Cemetery (Old Monroe, MO)

Immaculate Conception Catholic Church Endowment Fund

Immaculate Conception Catholic Church (Dardenne Prairie, MO)

Immaculate Conception Parish and Cemeteries Endowment Fund

Immaculate Conception Catholic Church & Cemetery (Park Hills, MO)

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

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

Immaculate Heart of Mary Catholic Church Endowment Fund

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

Jane T. Sohm Memorial Scholarship Endowment Fund

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



\$79M Cumulative Grants and Distributions

Assumption Catholic Church (Mattese) Endowment Fund

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

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

Assumption Catholic Church (O'Fallon, MO)

Beyond Sunday Education Endowment Fund

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

Cadet Thomas M. 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 Catholic 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)

Francis and Margaret Monahan Memorial Scholarship Endowment Fund

Bishop DuBourg 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)

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 (Des Peres, 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 Catholic Church (Kirkwood, MO)

FUNDS & OTHER PLANNED GIFTS

ENDOWMENT FUNDS CONTINUED

Most Sacred Heart Catholic Parish – Eureka Endowment Fund

Most Sacred Heart Catholic 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 Catholic Church (Oakville, 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 Lamert Memorial Endowment Fund

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

Roman Catholic Foundation Endowment Fund

Roman Catholic Foundation of Eastern Missouri (St. Louis, MO)

Rosati-Kain High School Class of 1988 Memorial Scholarship Endowment Fund

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

St. Cletus Parish Endowment Fund

St. Cletus Catholic 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 Catholic Church (Oakville, 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. Gabriel the Archangel Parish Endowment Fund

St. Gabriel the Archangel Catholic Church (St. Louis, MO)

St. Gertrude Catholic Church Endowment Fund

St. Gertrude Catholic Church (Krakow, MO)

St. Ignatius Loyola Catholic Church Endowment Fund

St. Ignatius Loyola Catholic Church (Marthasville, MO)

St. James the Greater Beyond 28 Endowment Fund

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

St. John the Apostle Parish and Cemetery Endowment Fund

St. John the Apostle Catholic Church & Cemetery (Bismarck, MO)

St. Joseph (Apple Creek) and St. Michael (Apple Creek) Cemeteries Endowment Fund

St. Joseph Catholic Church (Apple Creek, MO)

St. Joseph Catholic Church (Apple Creek) Endowment Fund

St. Joseph Catholic Church (Apple Creek, MO)

St. Louis Archdiocesan Priests' Doctoral Education Endowment Fund

Archdiocese of St. Louis



\$66M Total Assets Under Management

Rosati-Kain High School Endowment Fund

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

Rural Parish Clinic Endowment Fund

Rural Parish Clinic (Archdiocese of St. Louis)

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)

Sacred Heart Catholic Church (Troy) Endowment Fund

Sacred Heart Catholic Church (Troy, 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)

Sisters of the Most Precious Blood Cemetery Fund

Sisters of the Most Precious Blood Cemetery (O'Fallon, MO)

St. Ann Catholic Church – Clover Bottom Endowment Fund

St. Ann Catholic 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 Catholic Church (Ellisville, MO)

St. Clement of Rome Catholic Church Endowment Fund

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

St. Margaret Mary Alacoque Parish Endowment Fund

St. Margaret Mary Alacoque Catholic Church (St. Louis, MO)

St. Margaret Mary Alacoque Parish School Endowment Fund

St. Margaret Mary Alacoque School (Oakville, MO)

St. Margaret of Scotland Catholic Church Endowment Fund

St. Margaret of Scotland Catholic Church (St. Louis, MO)

St. Mary Magdalen Catholic Church Endowment Fund

St. Mary Magdalen Catholic Church (Brentwood, MO)

St. Mary Parish Endowment Fund

St. Mary Catholic Church (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 Catholic Church (Lemay, MO)

St. Maurus (Biehle) Cemetery Endowment Fund

St. Maurus Catholic Church (Biehle, MO)

St. Monica Catholic Church Endowment Fund

St. Monica Catholic Church (Creve Coeur, MO)

St. Patrick Parish Endowment Fund

St. Patrick Catholic Church (Wentzville, MO)

St. Peter Catholic Church (Kirkwood) Endowment Fund

St. Peter Catholic 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)

ENDOWMENT FUNDS CONTINUED

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

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

St. Vincent de Paul Knights of Columbus Endowment Fund
St. Matthias Catholic Church – St. Vincent de Paul Conference (Lemay, MO)

Ste. Genevieve Catholic Church Endowment Fund
Ste. Genevieve Catholic Church (Ste. Genevieve, MO)

Sts. Joachim and Ann Care Services Endowment Fund
Sts. Joachim and Ann Care Services (St. Peters, MO)

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

The Immacolata Catholic Church Endowment Fund
Immacolata Catholic Church (Richmond Heights, 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 (Clayton, MO)

Young Catholic Musicians Endowment Fund
Catholic Grade School Band Programs (Archdiocese of St. Louis)

DONOR-ADVISED FUNDS

Anonymous (14)

Baalmann Family Charitable Fund

Baranowski Family Charitable Fund

The BVC Catholic Impact 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

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

Our Lady of La Salette Charitable Legacy (OLLSSL)

Our Lady of Guadalupe Donor-Advised Fund



35 Testamentary Intentions Valued at \$33M+

LONG-TERM FUNDS

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

Christopher M. Locher (Class of 1999) Memorial Scholarship Fund
St. Francis Borgia High School (Washington, 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 (Des Peres, MO)

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

Kevin Beckmann Fund St. Anselm Catholic Church (Creve Coeur, 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 Catholic Church (St. Louis, MO)

Roman Catholic Foundation Fund
Roman Catholic Foundation of Eastern Missouri (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)

Robinson Family Donor-Advised Fund

Ross Family Donor-Advised Fund

Sacred Heart Donor-Advised Fund

Sisters of the Most Precious Blood - (O'Fallon) Donor-Advised Fund

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

Rosemary and Joseph Shaughnessy Fund

Perry and Mary Simeroth Donor-Advised Fund

Terrance Michael Smith 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

The Tracy Family Fund

Lisa L. and Michael W. Walsh Donor-Advised Fund

FUNDS & OTHER PLANNED GIFTS

CHARITABLE GIFT ANNUITIES

Anonymous (2) All Souls Catholic Church (Overland, MO)
Anonymous Assumption (Mattese) Catholic Church (St. Louis, MO)
Anonymous Catholic Charities of St. Louis (St. Louis, MO)
Anonymous Daily Worldmissionaries (St. Louis, MO)
Anonymous Michael P. McMillan Scholarship Endowment Fund
Anonymous Our Lady of Lourdes Catholic Church (Washington, MO)
Anonymous St. Francis Borgia Regional High School (Washington, MO)
Anonymous St. Francis Borgia Catholic Church (Washington, MO)
Anonymous St. Joseph Catholic Church (Apple Creek, MO)
Anonymous St. Mary Magdalen Catholic Church (Brentwood, MO)
Anonymous St. Vincent de Paul Catholic Church – Perryville Endowment Fund (Perryville, MO)
Anonymous Sts. Joachim and Ann Care Services (St. Peters, MO)
Rev. Msgr. Francis Blood Annual Catholic Appeal/Perpetual Light Society (St. Louis, MO)
Patricia Helen Clendenin Annual Catholic Appeal/Perpetual Light Society (St. Louis, MO)
Mark Hanneke Catholic Charities of St. Louis (St. Louis, MO)
Rev. Harold Voelker (8) Retired Archdiocesan Priests' Endowment Fund (St. Louis, MO)
Rev. Msgr. Michael Witt
Kenrick-Glennon Seminary & All Saints Catholic Church (University City, MO)

CHARITABLE GIFT ANNUITIES GIFT COMPLETED

Anonymous Our Lady of Lourdes Catholic Church (Washington, MO)
Anonymous St. Francis Borgia Catholic Church (Washington, MO)
Anonymous St. Francis Borgia Regional High School (Washington, MO)
Msgr. Jerome Buchheit* Retired Archdiocesan Priests' Endowment Fund (St. Louis, MO)
Leonard Knobbe* St. Mary's High School (St. Louis, MO)
Leonard Knobbe* Washington University Catholic Student Center (Clayton, MO)
Rev. Ronald Rubbelke*(2)
Latin America Apostolate & Retired Archdiocesan Priests (St. Louis, 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 \$33M
Benefiting 128 Organizations

TESTAMENTARY INTENTION RECIPIENTS

Access Academies St. Louis, MO (1)
Aid to the Church in Need Brooklyn, NY (1)
American Life League Falmouth, VA (1)
Annual Catholic Appeal St. Louis, MO (12)
Archbishop Robert J. Carlson Endowment Fund St. Louis, MO (1)
Association of the Miraculous Medal Perryville, MO (1)
Assumption Catholic Church O'Fallon, MO (1)
Benedictine Mission House (Christ the King Priory) Schuyler, NE (1)
Beyond Sunday Educational Endowment St. Louis, MO (4)
Birthright Counseling of St. Louis St. Louis, MO (1)
Bishop Dubourg High School St. Louis, MO (1)
Cardinal Glennon Children's Foundation St. Louis, MO (1)
Cardinal Ritter 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 Bishops of North Alaska Fairbanks, AK (1)
Catholic Charities of St. Louis St. Louis, MO (10)
Catholic Near East Welfare Association New York, NY (1)
Cedar Lake Foundation Foristell, MO (1)
Champ Assistance Dogs St. Louis, MO (1)
Christian Brothers College High School St. Louis, MO (1)
Christian Brothers of the Midwest District Burr Ridge, IL (1)
Covenant House Missouri St. Louis, MO (1)
Covenant Radio St. Louis, MO (4)
Cross Catholic Outreach Boca Raton, FL (2)
DeSmet Jesuit High School St. Louis, MO (1)
Duo Dogs St. Louis, MO (1)
Dynamic Catholic Institute Erlanger, KY (1)
Edward J. Auer Memorial Scholarship Fund St. Louis, MO (1)
Endangered Wolf Sanctuary St. Louis, MO (1)
Equestrian Order of the Holy Sepulcher of Jerusalem, Northern Lieutenancy Omaha, NE (1)
Eternal Word Television Network Irondale, AL (1)
Food for the Poor Coconut Creek, FL (1)
Fr. Bob's (Gettinger) Outreach St. Louis, MO (1)
Glenmary Home Missioners Fairfield, OH (1)
Gregorian University Foundation Washington, D.C. (1)
Holy Cross Academy, St. Michael the Archangel Campus Shrewsbury, MO (1)
Holy Trinity Catholic Church St. Louis, MO (1)
Immacolata Catholic Church Richmond Heights, MO (1)
Immaculate Conception Catholic Church Cemetery, Old Monroe Old Monroe, MO (1)
Incarinate Word Academy St. Louis, MO (1)
Incarinate Word Catholic Church Chesterfield, MO (1)
Incarinate Word Parish School Chesterfield, MO (1)
Kenrick-Glennon Seminary St. Louis, MO (7)
Life Teen International, Inc. Atlanta, GA (1)
Little Flower Catholic Church Richmond Heights, MO (1)
Little Sisters of the Poor St. Louis, MO (1)
Marian Middle School St. Louis, MO (1)
Maryknoll Fathers and Brothers Maryknoll, NY (1)
Mission of Our Lady of Mercy Chicago, IL (1)
Mission of The Sisters at Our Lady of Guadalupe Convent St. Louis, MO (2)
Missionary Association of Mary Immaculate Belleville, IL (1)
Missouri National Veterans Memorial Perryville, MO (1)



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Funds Established/ Other Planned Gifts

TESTAMENTARY INTENTION RECIPIENTS CONTINUED

Mount Hope Cemetery - St. Boniface Cemetery Perryville, MO (1)
 Mt. Grace Convent (Pink Sisters) St. Louis, MO (1)
 National Shrine of St. Joseph and Friends St. Louis, MO (1)
 National Shrine of St. Jude Chicago, IL (1)
 National Shrine of St. Odilia Onamia, MN (1)
 Our Lady's Inn St. Louis, MO (2)
 Pontifical North American College Rome, Italy (1)
 Priests for Life Coco, FL (2)
 Priests Mutual Benefit Society St. Louis, MO (3)
 Regina Cleri St. Louis, MO (2)
 Relevant Radio Green Bay, WI (1)
 Respect Life Apostolate St. Louis, MO (2)
 Retired Archdiocesan Priests' Endowment Fund St. Louis, MO (1)
 Roman Catholic Foundation of Eastern Missouri St. Louis, MO (2)
 Rosati-Kain Academy St. Louis, MO (1)
 Rural Parish Clinic St. Louis, MO (1)
 Rural Parish Workers of Christ the King Cadet, MO (2)
 Sacred Heart Monastery - Priests of Sacred Heart Hales Corner, WI (1)
 Saints Peter & Paul Catholic Church St. Louis, MO (1)
 Salesian Missions New Rochelle, NY (1)
 Seven Holy Founders Catholic Church Afton, MO (1)
 Society of St. Vincent de Paul Archdiocesan Council of St. Louis St. Louis, MO (2)
 Society of St. Vincent de Paul Festus, MO (1)
 Society of St. Vincent DePaul Perryville, MO (1)
 Society of the Propagation of the Faith and Peace and Justice Commission St. Louis, MO (2)
 St. Angela Merici Catholic Church Florissant, MO (1)
 St. Cletus Catholic Church St. Charles, 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 Catholic Church Elementary School Washington, MO (2)
 St. Francis Cabrini Academy St. Louis, MO (1)
 St. Francis Community Services St. Louis, MO (1)
 St. Gabriel Catholic Church St. Louis, MO (1)
 St. Gianna Catholic Church Wentzville, MO (1)
 St. John the Apostle and Evangelist Catholic Church St. Louis, MO (1)
 St. Joseph Catholic Church Wentzville, MO (1)
 St. Joseph Neier Catholic Church Cemetery Neier, MO (2)
 St. Jude's Children's Hospital Memphis, TN (1)
 St. Justin Martyr Catholic Church Sunset Hills, MO (1)
 St. Louis Area Food Bank St. Louis, MO (1)
 St. Louis University St. Louis, MO (1)
 St. Louis University High School St. Louis, MO (1)

St. Luke the Evangelist Catholic Church Richmond Heights, MO (1)
 St. Margaret of Scotland Elementary School St. Louis, MO (1)
 St. Martha's Hall St. Louis, MO (1)
 St. Mary's of the Barrens-National Shrine Perryville, MO (1)
 St. Mary's Southside Catholic High School St. Louis, MO (1)
 St. Michael the Archangel Catholic Church Shrewsbury, MO (1)
 St. Norbert Catholic Church Florissant, MO (1)
 St. Patrick Center St. Louis, MO (2)
 St. Paul Catholic Church & St. Paul Catholic Church Cemetery Berger, MO (1)
 St. Paul VI Institute Omaha, NE (1)
 St. Peter Catholic Church St. Charles, MO (1)
 St. Simon the Apostle Catholic Church Green Park, MO (1)
 St. Stephen Catholic Church Richwoods, MO (1)
 St. Theodore Catholic Church Wentzville, MO (1)
 St. Vincent de Paul Catholic Church Perryville, MO (1)
 St. Vincent de Paul Parish Elementary School Dutzow, MO (2)
 St. Vincent de Paul Society, Annunziata Parish Ladue, MO (1)
 St. Vincent Education Foundation Perryville, MO (1)
 Stephen Siller Tunnel to Towers Foundation Staten Island, NY (1)
 The Carmel of St. Joseph St. Louis, MO (1)
 The Companions of St. Anthony Ellicott City, MD (1)
 The Crudem Foundation Ludlow, MA (1)
 The School Sisters of Notre Dame Central Pacific Province St. Louis, MO (1)
 Thomas Moore Society Chicago, IL (1)
 Unbound Kansas City, KS (1)
 Variety the Children's Charity St. Louis, MO (1)
 Vision of Peace Hermitages Pevely, MO (1)
 Visitation Academy St. Louis, MO (1)
 White House Retreat Center St. Louis, MO (2)
 Woodlawn Foundation Chicago, IL (1)
 World Bird Sanctuary Valley Park, MO (1)

TESTAMENTARY GIFT INTENTIONS FUNDED

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

*Deceased



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Benefiting Organizations



A LETTER FROM OUR BOARD

Dear Friends,

We are all at a crucial point in our history as we work to grow our Catholic faith for the next generation. The Roman Catholic Foundation’s tenth anniversary reflects Archbishop Carlson’s vision of inspiring Catholic leaders and donors to consider how planned giving could help our institutions today and in future generations. The seamless transition over the years of our board members, president, and now board chairs reflects the shared dedication to our mission. These elements are essential as we seek to pass on our faith to our children and grandchildren and help the Church be a voice for peace and eternal salvation in a world that would try to pull them away.



We are also at a point of significant generational change. As those who have led our institutions and ministries for decades begin to pass the baton to the next generation, the Roman Catholic Foundation has a tremendous opportunity. Over the next few years, billions of dollars will change hands as one generation hands it on to the next. The work of the Foundation could impact countless more souls with even a marginal growth in the funds we steward. Far more than just a financial figure, these funds represent student scholarships, capital improvements for parishes, emergency assistance funds for ministries, and so much more.



“As President of the Roman Catholic Foundation, I extend heartfelt appreciation to the Rosses for their exemplary leadership, which has significantly shaped our organization’s success. Their dedication and vision have left an indelible mark, guiding us towards our noble mission. Additionally, I warmly welcome the Guyols as our new Board Chairs. Their historical connection, enthusiasm, and expertise promise to invigorate our endeavors, ushering in a continued legacy of excellence and impact. Together, we shall continue to serve with unwavering commitment and compassion.” – Joe Bestgen, President & CEO

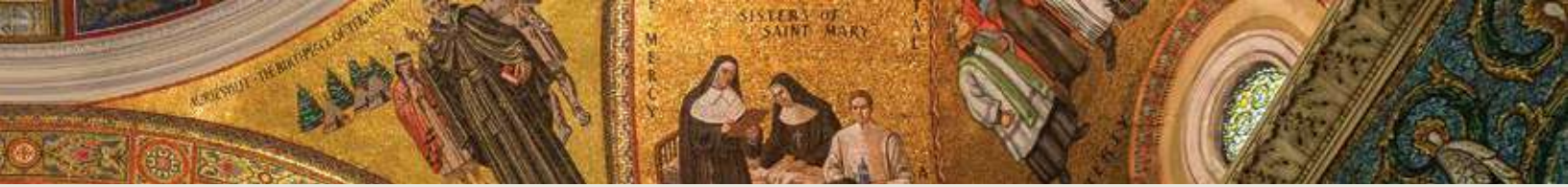
This annual report includes a collection of personal examples that show how taking simple steps in planned giving can have a lasting impact. The examples represent gifts of various sizes and a wide range of personal stories and connections. The key uniting factor is faith, followed by a desire to help and trust in God’s providence.

It has been our honor to grow this mission together with the Foundation staff over the last ten years, and we want to especially thank the board members for their tireless work. Serving on the board of the Roman Catholic Foundation is not simply a formality or prestige position but a significant time commitment to furthering the Foundation’s mission through the work of various committees.

The Roman Catholic Foundation’s success in just ten years is remarkable. It would not have been possible without the work of many parish, school, and ministry leaders, priests, donors, and everyone who has taken the time to consider how they can share our Catholic faith. We are filled with hope and joy for the future, and thank you for your support!

Sincerely,

Don & Nancy Ross, Mark & Joan Guyol Board Co-Chairs



ROMAN CATHOLIC FOUNDATION MEMBERS

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Archdiocese of St. Louis*

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Archbishop, Archdiocese of St. Louis

Most Reverend
Mark S. Rivituso
Auxiliary Bishop, Archdiocese of St. Louis

Joe Bestgen
*President & CEO,
Roman Catholic Foundation*

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Pat & Leonard* Dino

Rita & Mike Mooney

Rosemary & Joe Shaughnessy

*Deceased

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Christina K. Duepner, MS Accounting
Senior Accountant

Andrea Sharp
*Senior Donor Services Representative
& Analyst*

Erica Winter, MA
Marketing Coordinator

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

*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.

MAXIMIZING GIVING WITH A DONOR-ADVISED FUND

Strengthen Your Catholic Philanthropy

Make the most of your contributions. Here are six reasons you should consider opening a **Donor-Advised Fund (DAF)** at the Roman Catholic Foundation:

- 1 **Tax Efficiency:** DAF contributions are tax-deductible, offering immediate benefits. Additionally, by donating appreciated assets, donors can avoid capital gains taxes.
- 2 **Simplicity:** A DAF makes managing charitable giving easier by consolidating donations into one account, simplifying record-keeping, and reducing administrative burdens.
- 3 **Flexibility:** Donors can recommend grants to eligible charities over time, allowing for strategic and flexible giving according to changing priorities or needs.
- 4 **Privacy:** DAFs offer a degree of anonymity, allowing donors to support causes without publicly disclosing individual grants.
- 5 **Legacy Building:** DAFs enable donors to involve their families in philanthropy, fostering a culture of giving across generations and leaving a lasting charitable legacy.
- 6 **Alignment with Catholic Values:** The Foundation invests all assets in a manner that aligns with your Catholic values.



SCAN TO WATCH!

Learn more about Donor-Advised Funds

Whether you already have a DAF or would like to create one, we invite you to scan the code or visit bit.ly/RCF-DAFP to watch a brief video and learn more!

Transfer your existing Donor-Advised Fund to the Foundation to align your giving and faith!