



GIVE WITH PURPOSE AND PLAN WITH CONFIDENCE

Charitable Giving Options Through the Roman Catholic Foundation

The Roman Catholic Foundation is an independent 501(c)(3) established to support the parishes, schools, and ministries in our Catholic community. We can help you help those you serve achieve their charitable goals, whether establishing a legacy gift or giving today for the greatest possible impact.

Donors don't give to the Foundation; they give through it to Catholic causes they care about most.

\$103M

Assets Under Management

300+

Charitable Funds & Gifts

~\$91M

Parish, School & Ministry Gifts

~\$83M

Stewarding Testamentary Gifts

As a strategic partner, our team supports advisors, nonprofit professionals, and donors throughout the philanthropic planning process. The donor's trusted relationships remain at the center of the conversation, while we help explore charitable giving strategies that align with the donor's values, goals, and financial or estate planning priorities. Possible giving options may include gifts through a will or trust, retirement plan assets, life insurance, gifts that provide income and preserve assets for future generations, and other approaches designed to create meaningful impact.

FUND TYPE	DONOR BENEFITS
Donor-Advised Fund	• Immediate tax deduction for the donor • Avoid capital gains on gifts of highly appreciated assets, including real estate • Funds invested in accordance with Catholic social teaching • Funds grow tax-free • Grants may be recommended at donor's convenience • Anonymity is possible on a gift-by-gift basis
Long-Term Unendowed Fund	• Immediate tax deduction for the donor • Avoid capital gains on gifts of highly appreciated assets, including real estate • Support meeting a specific need over a specified time period • Flexibility in distributions as both principal and earnings can be distributed
Endowment Fund	• Immediate tax deduction for donor or his/her estate • Avoid capital gains on gifts of highly appreciated assets, including real estate • Perpetual support for a parish, school or ministry that the donor loves • Support meeting either a specific need or most critical need of the day
Charitable Gift Annuity	• Secure, fixed annuity payment for life • Tax-free income on a portion of annuity payment • Avoid immediate capital gains tax on gifts of highly appreciated assets, including real estate • Partial charitable deduction for donor • Utilize the once-in-a-lifetime distribution from IRA to establish CGA
Charitable Remainder Trusts	• Partial charitable deduction for the gift made to the trust • Avoid immediate capital gains tax on gifts of highly appreciated assets, including real estate • Lifetime income for the designated beneficiary • Remainder benefits the parish, school, or ministry that the donor loves
Testamentary Designated Fund	• Tax deduction for donor's estate • Flexibility during donor's lifetime to make changes without incurring additional professional fees

*Each charitable fund pays an investment oversight fee and a support fee that covers the wide range of services available to donors and helps support the Roman Catholic Foundation's work in the community. Support fees enable the Foundation to deliver an exceptional donor experience, and manage grants. In aggregate, these fees are reinvested to support Archdiocesan impact through our work in the Catholic community.