



**Catholic Foundation**  
*for the Diocese of Green Bay, Inc.*



**2011** Annual Report



## MISSION

The Catholic Foundation will encourage financial stewardship and generosity by providing a faith-based avenue for giving.

## GUIDING PRINCIPLES

*In all we do –*

- ✦ We will be Stewardship-minded. ✦
- ✦ We are accountable to our donors. ✦
- ✦ We will be faithful to our Church's mission. ✦

## VISION

We will be known and trusted throughout our diocese as the preferred faith-based foundation for giving.

# TABLE OF CONTENTS



Bishop's Message	4
President & Executive Director's Message	5
Advancing the Mission	6
Bishop's Appeal	6
Lumen Christi	7
World Mission Services	7
Fund Descriptions	8 – 20
Catholic Foundation Board of Directors	21
Distributions	22 – 25
Financial Statements	26
Legacy Society	27
Levels of Giving	28 – 29
Circle of Hope	30
Planned Giving	31
Catholic Foundation Planned & Deferred Giving Donors	32 – 34
Catholic Foundation Staff	35



## Dear Sisters and Brothers in Christ,

People across Northeastern Wisconsin have lived by this simple message from St. Francis of Assisi. I experience the Lord's blessings even more when I share my prayers, service or financial gifts. We all know God can never be outdone in generosity. Through your generous giving, the Catholic Church continues to change the lives of thousands of families and individuals each and every day.

People often use the Catholic Foundation as a vehicle for their charitable giving. In many cases a person or a family works with the Foundation to leave a legacy to their parish, Catholic school or special ministry. Legacies large and small make a tremendous difference. As one couple recently shared with Cindi Brawner, they are going to remember the Diocese in their will because they view the Church as their fourth child.

I am grateful they have decided not only to leave a legacy, but also to remember the Catholic Church. If you have remembered the Church in your will or estate plans, thank you. If you have any questions about leaving a legacy, please give a call to Cindi Brawner or Josh Diedrich at the Catholic Foundation.

Thank you also for your support of the Church through the Bishop's Appeal, Seminarian Collection, World Mission Sunday Collections and in many other ways. Your gifts makes a significant impact in the lives of Catholics throughout our Diocese and the world.

As you review this annual report, please pray about what legacy God is calling you to leave. Thank you again, and may God continue to bless you.

Sincerely yours in Christ,

A handwritten signature in black ink that reads "David L. Ricken". The signature is written in a cursive style with a large initial 'D'.

The Most Reverend David L. Ricken, DD, JCL  
Bishop of Green Bay

A stained glass window depicting St. Francis of Assisi, showing him with a halo and holding a staff, set within a pointed arch. The colors are muted and the image is semi-transparent.

*“For it is in giving  
that we receive.”*

— St. Francis of Assisi





## Dear Friends,

As we look back on the past year, we are pleased to note the many new legacies created through the Catholic Foundation in the forms of endowments, bequests and estate plans. Twenty-two new funds created this year will impact so many charitable purposes for years to come.

The Foundation is an important part of our Diocese. We are the vehicle through which donors may share gifts and know their intentions will be carefully followed. A capable group of Catholics who follow the tenets of our faith and serve as the Board of Directors ensure the funds will always be governed with strong Catholic values. Many of our donors tell us this is important to them and a deciding factor as they make their plans.

The Advancing the Mission campaign endowments continue to impact the Diocese with more than \$677,592 being distributed in the areas of Leadership Development, Lifelong Catechesis, Evangelization and Priestly Retirement Care since inception. This is a large part of the almost \$3 million given through the Foundation this year.

The Bishop's Appeal continues to be a success thanks to all of the donors, parishioners and the dedicated work of every parish. We see the Appeal impact thousands through ministries like Catholic Charities who are able to help more than 45,000 people annually and the Education department who help children in Catholic schools and religious education programs know the love of Jesus Christ. The Seminarian Collection and the many mission appeals are also so important to helping both here and throughout the world.

As we look to the future, we see how the continued growth of the Catholic Foundation will have an everlasting impact on the Diocese of Green Bay. We want to identify at least one volunteer in every parish to help in this important work. If you would like to serve as a Catholic Foundation representative in your parish, please let one of us know.

If you would like help as you consider the legacy you would like to provide, please contact Cindi to allow the Catholic Foundation to assist you in this important effort.

May God bless you and all those whom you love,

*Mary Schaupp Cindi K. Brawner*

Mary Schaupp  
President

Cindi K. Brawner  
Executive Director



# ADVANCING THE MISSION



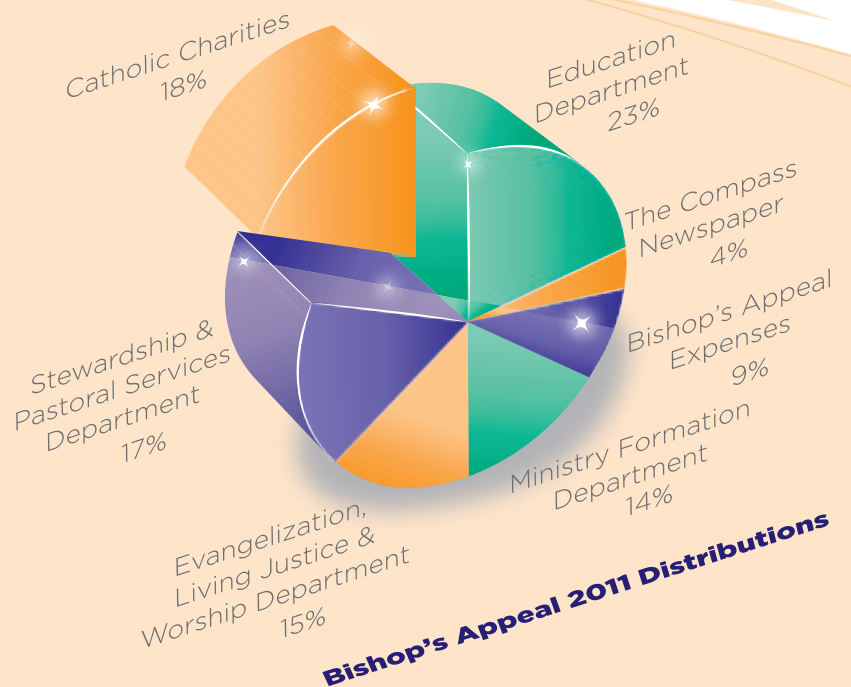
For hundreds of young adults on the west side of Green Bay, finding a place to gather and share their faith has been a blessing. A grant from the Catholic Foundation Advancing the Mission Evangelization Endowment helped the Quad parishes fund their “One Room at a Time” project. This Faith Formation center will provide a place to meet the spiritual and social needs of our youth. The center will also provide religious education classes, parish-wide youth ministry programs and parish events.

The Advancing the Mission campaign established endowments in the areas of Leadership Development, Evangelization, Lifelong Catechesis and Priestly Retirement Care. The campaign raised nearly \$40,000,000 and has distributed more than \$677,592.

## BISHOP’S APPEAL

Each year thousands of people across Northeastern Wisconsin come together and share their love of Christ by supporting the Bishop’s Appeal.

The Appeal is an annual fundraising campaign conducted by the Catholic Foundation to benefit nearly 300,000 people served by the Church. The 2011 Bishop’s Appeal raised \$5,017,000 and was distributed to the follow diocesan departments.



# LUMEN CHRISTI

Imagine being able to share the teachings of the Catholic faith with hundreds of young people. As a high school catechist, Kathy has been called to serve as a leader and role model to this very important population. Through a grant from the Lumen Christi Endowment, Kathy is able to continue her education and help our youth grow in their faith. More than 40,000 children have come to know people like Kathy, who have a great influence on our children's faith lives.

The everlasting impact on today's youth and future generations is just one way the Lumen Christi Endowment makes a difference. Created in 1988, Lumen Christi was established to benefit Catholic education and has since distributed more than \$17 million. This helps fund scholarships for educators to pursue additional training in religious education, provides annual funding to every parish religious education program and to every Catholic school. Over \$663,503 has been distributed this past year and to date the total value of the Lumen Christi endowment of the Catholic Foundation is nearly \$12 million.

## WORLD MISSION SERVICES

World Mission Services promotes the missionary spirit of the Gospel of Jesus Christ. Our programs, as offered through Catholic Relief Services and the Pontifical Mission Societies, foster global awareness and encourage Catholics in their baptismal call to missionary activity. Through prayer and financial support we join the people of the Green Bay Diocese in support of the spiritual, financial, and structural needs of developing churches, foster native vocations, contribute to disaster relief and assist the poor through self-development programs.



# FUND DESCRIPTIONS

## *Unrestricted*

---

### BISHOP'S GREATEST NEEDS

The diocesan Bishop decides which areas of greatest need receive help from this fund, which serves as the Foundation's general fund. All unrestricted gifts to the Foundation become part of this fund. Established in 1998 in honor of Bishop Robert J. Banks.

### BISHOP'S APPEAL ENDOWMENT

Supports the Green Bay Diocese's ongoing programs and services. Established by a generous bequest to the Bishop's Appeal. Additional gifts and bequests are most welcome!

### OPERATING FUND

Supports the ongoing operations of the Catholic Foundation. Additional gifts are most welcome!

## *Donor Advised*

---

### ARTHUR & GLADYS SCHMIDT FAMILY FUND FOR NEEDY

Established to carry on the values of family giving through gifts to various Catholic organizations reaching out to the needy.

### CATHOLIC WOMAN'S CLUB OF GREEN BAY

Established to continue the heritage of giving of the Catholic Woman's Club of Green Bay.

### JOSEPH & SARAH VAN DRISSE ENDOWMENT

Established to honor the memory of Joseph & Sarah Van Drisse by assisting many Catholic causes in the Diocese of Green Bay.

### LONG FAMILY FUND FOR CATHOLIC CHARITY

Established by the Darlene and Donald J. Long, Sr. family to support a variety of Catholic causes.

### MANUEL & ALICE FALK FUND FOR CATHOLIC CHARITY

Established in recognition of Manuel & Alice Falk, the parents of the donor, to carry on a tradition of giving to Catholic and community charitable activities.





**MARK & SALLY FOLLETT FAMILY  
STEWARDSHIP FUND**

Established in honor of St. Joseph the Worker and in gratitude for their many blessings. It is part of their mutual commitment to support one another in adopting a Stewardship way of life through prayer, service & sharing.

**OUR LADY QUEEN OF PEACE  
STEWARDSHIP FUND**

Established to support Catholic and community charitable activities in honor of Our Blessed Mother, our model of faith, hope and charity, to promote the truth and love of our Lord and to give honor to our Lord and his Mother, Our Lady Queen of Peace.

**PAUL & CAROL SCHIERL DONOR ADVISED FUND**

Established to facilitate Schierl Family charitable giving for Catholic endeavors.

**PAUL & NICOLE SCHNEIDER FAMILY FUND**

Established to carry on into the future the family tradition of giving to Catholic and community charitable activities.

**RELEVANT RADIO CHRISTIAN OUTREACH FUND**

Helps the Starboard Network serve the mission of Jesus Christ by establishing community Catholic radio and providing relevant programming to educate, inform, inspire and build a new civilization of love.

**SCHIERL CHILDREN FAMILY STEWARDSHIP FUND**

The children of Paul Schierl and their spouses established this fund out of gratitude for their many blessings and as part of their mutual commitment to support each other in adopting a Stewardship way of life through prayer and charitable works.

**STEPHEN H. ECKES CUSTODIAL FUND**

Established through a generous bequest from the Stephen H. Eckes estate to carry on charitable giving in his memory to help Catholic organizations.

**WALTER & MARY ANN WILINSKI FAMILY  
DONOR ADVISED FUND**

Established to promote charitable giving of the Walter & Mary Ann Wilinski Family.

## *Education*

---

**ALL SAINTS CATHOLIC SCHOOL  
ENDOWMENT, ANTIGO**

Benefits students of the All Saints Catholic School System of Antigo.

**BURUNDI GREATEST NEEDS FUND**

Created to ensure school supplies and other educational needs for the children of Burundi, Africa. Any amount is most welcome!

**CHRISTMAS STARS SCHOLARSHIP FUND**

Supports the fine arts programs of Appleton Catholic Education System (ACES) and Xavier High School through scholarships to ACES/Xavier students involved in the fine arts.

**CHRISTMAS STARS ANNA LEITERMANN  
SCHOLARSHIP FUND**

Established in memory of Anna Leitermann, tragically killed in a car accident, to benefit a Christmas Stars' member who is enrolled in the fall college term.

**DR. JAMES C. & KATHLEEN CURRY  
TUITION FUND**

Benefits Catholic elementary schools through tuition assistance to low-income, minority or other children needing aid to attend Catholic grade schools.

**EDWARD & MARGIE VAN DE LOO FUND**

Created in memory of Edward & Margie Van De Loo to benefit the Kaukauna Catholic School System by providing tuition assistance to poor and deserving children who attend the Kaukauna Catholic School System. Preference is given to the children of Hollandtown.

**FATHER DONALD FULLER FUND FOR  
HOLY ANGELS**

Established through a generous bequest from the estate of Father Donald Fuller, to be used by Holy Spirit School as determined by the principal and the Total Catholic Education Board.

#### FATHER LEO PRZYBYLSKI ENDOWMENT

Established through the estate of Alice Przybylski to honor the memory of her brother, Fr. Leo Przybylski and to benefit the educational needs in the parishes in which he served.

#### GEORGE P. MUELLER ENDOWMENT FOR ST. MARGARET MARY PARISH SCHOOL

Supports and assists the Catholic elementary school at St. Margaret Mary Parish in Neenah by providing supplemental funding for its programs and services.

#### GEORGE P. MUELLER ENDOWMENT FUND FOR SACRED HEART PARISH ELEMENTARY EDUCATION

Supports and assists the Catholic elementary school at Sacred Heart Parish in Sherwood by providing supplemental funding for its programs and services.

#### GREEN BAY AREA CATHOLIC EDUCATION SYSTEM (GRACE) ENDOWMENT FUND

Established to benefit the programs and operations of the GRACE System. Additional gifts are most welcome!

#### HELEN K. ASMUTH ENDOWMENT FUND FOR ST. MARY CENTRAL HIGH SCHOOL

Established to provide scholarships to attend St. Mary Central High School in Menasha.

#### HOLY FAMILY PARISH EDUCATION ENDOWMENT, BRILLION

Assists Holy Family Parish in its mission to support total Catholic education by providing supplemental funding for programs and services.

#### JOHN S. GRUNDMAN SCHOLARSHIP FUND

This scholarship provides tuition for financially distressed students in the Oshkosh Catholic schools.

#### JOSEPH & MARY SCHINDLER FAMILY FUND

Provides tuition assistance to students in need at St. Mary Central High School in Menasha.

#### KAUKAUNA CATHOLIC SCHOOL SYSTEM FUND

Helps provide for the operation of the Kaukauna Catholic School System.

#### LOURDES HIGH SCHOOL ENDOWMENT

Provides for the greatest needs of the Lourdes High School in Oshkosh.

#### LUMEN CHRISTI ENDOWMENT

Established in 1988 to assist with educational needs in the Diocese of Green Bay.

Provides annual support for religious education in every faith community, an annual per student contribution to every Catholic school, tuition assistance and scholarships to those furthering their education to serve in Catholic education.

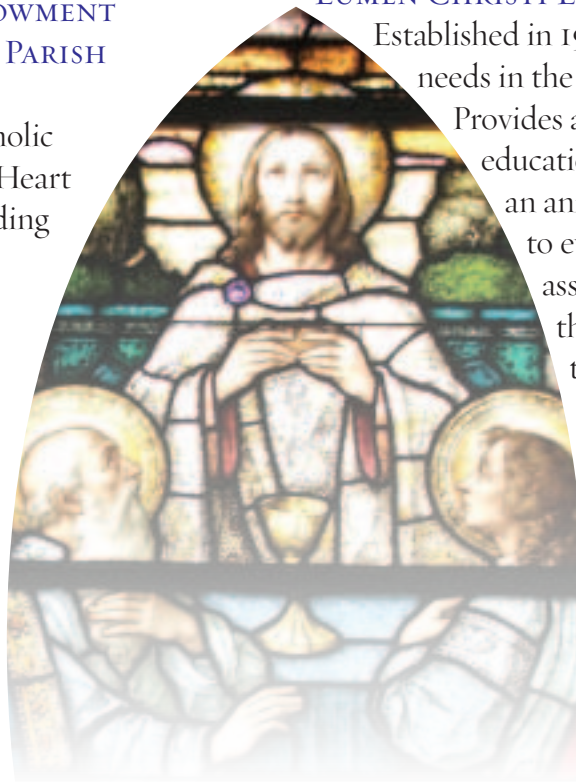
#### NANCY RIVAS MEMORIAL SCHOLARSHIP FUND

This scholarship was established to honor the memory of Green Bay East High School student, Nancy Rivas, who was killed in a tragic car accident in 2009. This fund will help female, Hispanic senior-

age students who have been accepted into an accredited program/college and, like Nancy, have demonstrated the ability to overcome challenges and obstacles to achieve life and education goals.

#### NORBERT & CAROLINE KOEPPEL SCHOLARSHIP FUND FOR ST. JOSEPH/HOLY FAMILY PARISH

Established in memory of Norbert & Caroline Koepfel to benefit confirmed members of the St. Joseph/Holy Family Parish in Phlox who are pursuing post secondary education.



**NOTRE DAME DE LA BAIE ACADEMY ENDOWMENT, GREEN BAY**  
Established by the Darlene and Donald J. Long, Sr. family to benefit the programs and operations of Notre Dame de La Baie High School.

**NOTRE DAME OF DE PERE SCHOOL ENDOWMENT**  
Established to provide support and assistance to Notre Dame of De Pere in its mission by providing supplemental funding for its programs and services as well as operations, maintenance, capital requirements and continued existence.

**OPEN SKIES EDUCATION INITIATIVE FUND**  
Established by Bishop Robert J. Banks to provide educational scholarships to underprivileged children.

**SACRED HEART TUITION ASSISTANCE ENDOWMENT**  
Provides tuition assistance to needy students attending the Unified Catholic School System of Oshkosh.

**SS. PETER & PAUL EDUCATION ENDOWMENT, GREEN BAY**  
Supports and assists Ss. Peter & Paul Parish in its mission of providing lifelong Catholic education for parishioners. Additional gifts are most welcome!

**ST. MARY PARISH EDUCATION ENDOWMENT, PESHTIGO**  
Assists and supports the Catholic school and religious education for adults and children by providing additional support for operations and maintenance to assure the school's continued existence.

**ST. ANN'S PARISH ASSISTANCE FOR DIVINE SAVIOR CATHOLIC SCHOOL, NEW HOLSTEIN**  
Established to help St. Ann's Parish children entering Divine Savior Catholic School.

**ST. ANTHONY CATHOLIC SCHOOL FUND, OCONTO FALLS**  
Established for the greatest needs of the Catholic school of St. Anthony Parish.

**ST. BERNARD SCHOLARSHIP FUND, GREEN BAY**  
Assists members of St. Bernard Parish, based on academic performance, with their high school and college education.

**ST. JOHN - SACRED HEART SCHOOL ENDOWMENT, SHERWOOD**  
Supports St. John-Sacred Heart School through supplemental funding for education programs and services. Additional contributions are always welcome and appreciated.

**ST. JOHN BOSCO CATHOLIC SCHOOL ENDOWMENT,  
STURGEON BAY**

Provides supplemental funding to support and assist St. John Bosco Catholic School and any future programs, and the St. John Bosco religious education program for adults and children.

**ST. JOHN NEPOMUCENE SCHOOL ENDOWMENT,  
LITTLE CHUTE**

Established through generous gifts from the 'Advancing the Mission' Stewardship Campaign to promote Catholic education and to provide for the general needs and ongoing operations of the St. John Nepomucene Catholic School.

**ST. JOHN THE BAPTIST PARISH SCHOOL FUND, HOWARD**

Established to provide support and assistance to St. John the Baptist School by providing supplemental funding for its programs and services, and to provide additional support for its operations, maintenance, capital requirements and continued existence.

**ST. JOSEPH PARISH SCHOOL FUND, GREEN BAY**

Established to support St. Joseph Parish School in Green Bay in its mission.

**ST. MARY CENTRAL HIGH SCHOOL ENDOWMENT, MENASHA**

Established to provide support for the general school operations, scholarships to attend the high school, and scholarships to assist graduating seniors with their initial college tuition financial needs.

**ST. MARY PARISH CATHOLIC SCHOOL ENDOWMENT, HILBERT**

Supports St. Mary Catholic School in its mission by providing funding to continue the legacy of Catholic education in Hilbert.

**ST. MARY PARISH SCHOLARSHIP FUND, OSHKOSH**

Established by the Thomas Lopina Family to provide scholarships to children from the former St. Mary Parish who wish to attend the Unified Catholic Schools of Oshkosh and the lay ministry formation program of the parish.

**ST. PAUL LIFETIME CATHOLIC EDUCATION FUND, WRIGHTSTOWN**

Supports and assists St. Paul Parish, now St. Clare Parish, in its mission of providing Catholic education throughout the life spans of the Wrightstown parish community members.

**ST. THOMAS MORE CATHOLIC EDUCATION ENDOWMENT, GREEN BAY**

Established by Donald J. Long, Sr. in honor of his wife, Darlene M. Long, who received an excellent elementary school education at St. Mary of the Angels Catholic Elementary School, now part of Green Bay Area Catholic Education system (GRACE).



#### THE BRUCE & GRACE SCHOMMER FAMILY EDUCATION ENDOWMENT

Supports and assists St. John Nepomucene Parish Elementary School in its mission by providing supplemental funding for services and assistance with its educational programs.

#### THE LORRAINE VANDE WALLE FUND

Established by Lorraine Vande Walle to carry on her tradition of Catholic charitable giving.

#### THE SIMON FAMILY ENDOWMENT

Established to reduce tuition at St. John Nepomucene Catholic School in Little Chute and Xavier High School of Appleton, to encourage parents to provide a Catholic education for their children. Other Catholic charitable activities may also benefit.

#### TOTAL CATHOLIC EDUCATION ENDOWMENT

Established to benefit religious education programs and Catholic schools in the Diocese of Green Bay.

#### UNIFIED CATHOLIC SCHOOLS OF OSHKOSH

Benefits the Unified Catholic School System of Oshkosh.

#### XAVIER HIGH SCHOOL SCHOLARSHIP ENDOWMENT, APPLETON

Provides Catholic high school scholarships to Xavier High School students. Additional gifts are most welcome and appreciated.

### *Ministry*

---

#### A NEW GENESIS COMMUNITY ENDOWMENT

Assists 'A New Genesis Community' in its mission by enabling the community to contribute financial and material support to relevant causes.

#### BISHOP WYCISLO FUND FOR LAY MINISTRY FORMATION

Supplements funding for tuition and book costs to those in the Diocese who are in the Lay Ministry Formation program.

#### CLARENCE & DOLORES WALLACE FUND FOR MOUNT TABOR CENTER

Benefits Mount Tabor Center in Menasha, which provides retreat opportunities for youth and young people throughout the Diocese.

#### CLAUDE P. AND BERNICE V. ALLIE MINISTRY FUND

Established through the Claude P. & Bernice V. Allie estate to procure and educate priests, seminarians, and lay ministers of the Church of Green Bay.

#### DALLAS AND ANN MARIE WIXOM FUND FOR SEMINARIAN EDUCATION

Established to support and assist the Diocese of Green Bay in its mission to provide educational training to seminarians. This support can be for the general needs, tuition, room and board, health insurance, spiritual and pastoral programs and any other programs that benefit our seminarians.

#### DOMINICAN REPUBLIC MISSION, ELIAS PIÑA

Supports and assists the Diocese of Green Bay's mission in Elias Piña, Dominican Republic, including all outreach in the area through supplemental funding for its programs and services; and assistance in providing Catholic education programs.

#### DR. THOMAS & LOUVAIN BENO ENDOWMENT FOR

#### ADVANCING THE MISSION

Supports and assists the Catholic Diocese of Green Bay in its mission by funding leadership development, evangelization, life long catechesis, and priestly retirement care.





#### ELIZABETH M. ANDERLE FUND

Benefits St. Mary of the Angels Parish, Green Bay, and the Bishop's Greatest Needs Fund in the Catholic Foundation.

#### EVANGELIZATION ENDOWMENT

Created by the Advancing the Mission campaign to provide support for the Evangelization Department of the Diocese of Green Bay and to help support Diocesan-wide, vicariate, parish cluster and/or parish programs for worship, spirituality, sacred music, youth and young adult ministry, marriage preparation, family life, baptism preparation, campus ministry, retreat operations and activities of the RCIA programs by providing for these new evangelization initiatives.

#### GOLDIE & ETHEL DERENNE FUND FOR CHARITY

Established to carry on a tradition of giving to Catholic and community charitable activities.

#### HEALTH & WELFARE FUND OF THE DISCALCED CARMELITE NUNS, DENMARK

Established by the Premonstratensian Fathers of St. Norbert Abbey for the ongoing support of the Discalced Carmelite Nuns of the Holy Name of Jesus in Denmark.

#### HOLY ANGELS PARISH FUND, DARBOY

Established for the general needs of Holy Angels Parish, now Holy Spirit, in Darboy-Kimberly.

#### HOLY ANGELS STAINED GLASS WINDOW FUND, DARBOY

Established to preserve the stained glass windows at Holy Spirit Parish, Darboy site.

#### HOLY FAMILY PARISH ENDOWMENT, MARINETTE

Supports and assists Holy Family Parish in its mission by providing supplemental funding for its programs and services, operations, maintenance, capital requirements and continued existence.

#### HOLY NAME RETREAT HOUSE FUND

Established to benefit Holy Name Retreat House on Chambers Island. Additional gifts to Holy Name Retreat House are most welcome!

#### LEADERSHIP DEVELOPMENT ENDOWMENT

Created by the Advancing the Mission campaign to provide leadership development to include priestly study for advanced degrees; recruitment and education for deacons; assist in the education of seminarians toward ordination; recruitment and education of new parish directors; and to promote and support lay ecclesial vocations such as parish associates, religious education directors, parish business managers, youth ministers and any other lay ecclesial ministries.

#### LIFE-LONG CATECHESIS ENDOWMENT

Created by the Advancing the Mission campaign to provide for life-long catechesis to include help in funding religious education at the parish/vicariate level in the form of learning materials and teaching stipends; to help Catholic schools establish tuition assistance to needy families, and to provide direct assistance to needy schools; and to help in funding the current work of the Education Department of the Catholic Diocese of Green Bay inclusive of Adult Faith Formation.

**MAGGIE SULLIVAN CONLON FUND FOR  
ST. NORBERT COLLEGE PARISH/OLD ST. JOE'S, DEPERE**  
Provides supplemental funding to support and assist St. Norbert  
College Parish/Old St. Joe's with its greatest needs and help carry  
out the mission of the parish.

**MARCELLA GREUEL FUND**  
This fund is established through a bequest. Distributions benefit the  
Bishop's greatest needs.

**MARIE H. VAN DAALWYK FUND FOR SEMINARIAN EDUCATION**  
This fund was created in memory of Marie H. Van Daalwyk to facilitate  
the education and training of young men for the priesthood in the  
Diocese of Green Bay.

**MEISTER SEMINARIAN FUND**  
Benefits the seminarians of the Diocese to honor the memory of the  
founder's son, Richard Meister.

**MONICA MEYER FUND FOR THE EDUCATION OF PRIESTS**  
Established by a generous bequest from the Monica Meyer Estate to  
educate priests in the Catholic Diocese of Green Bay.

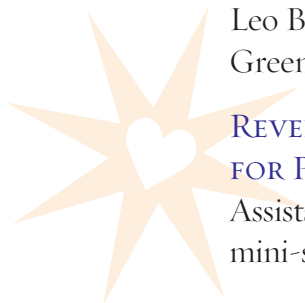
**NATIVITY OF OUR LORD PARISH FUND, GREEN BAY**  
Established on the 40th anniversary of Nativity Parish to provide for ongoing  
capital improvements and maintenance of the parish buildings and grounds.

**PETER T. WEILER FAMILY FUND**  
Awards scholarships for education of needy and deserving seminarians.

**PHILIP W. & MARIETTE C. ORTH ENDOWMENT FOR  
ST. AUGUSTINE PARISH, WAUSAUKEE**  
Established in memory of Philip & Mariette Orth to benefit the greatest  
needs of St. Augustine Parish, Wausaukee.

**PRIESTLY CARE ENDOWMENT**  
Created by the Advancing the Mission campaign to provide for priestly  
care by funding support for the welfare of the retired diocesan priests  
of the Catholic Diocese of Green Bay and the benevolent fund of the  
Leo Benevolent Association of the Priests of the Catholic Diocese of  
Green Bay, Inc.

**REVEREND MONSIGNOR CARL E. STEINER MINISTRY FUND  
FOR PRIESTS**  
Assists deserving priests with their requests for sabbaticals and  
mini-sabbaticals.





#### REVEREND DIONNE FUND FOR ALL SAINTS PARISH, DENMARK

This fund was established in memory of Father Chester Dionne to support religious education at All Saints Parish, Denmark, WI.

#### SALVATORIAN MISSION WAREHOUSE FUND

Helps the Salvatorian Mission Warehouse, a volunteer-run organization, defray annual transportation costs to deliver products donated by corporations to missions in Third World countries.

#### SEMINARIANS FUND

Established through a generous bequest from the Marcella T. Greuel estate to assist needy young men studying for the priesthood. Additional gifts are most welcome!

#### SEMINARIAN FUND IN MEMORY OF MARGARET GIROTTI - ANSHUS

This fund was established to honor the memory of Margaret Girotti Anshus and provide support and assistance to Seminarians by funding for education, programs and services.

#### SHRINE OF OUR LADY OF GOOD HELP, CHAMPION

Established to provide for the Shrine's future long-term needs. Additional gifts are most welcome.

#### SISTERS OF ST. FRANCIS OF THE HOLY CROSS FUND

Established to meet the greatest needs of the Sisters of St. Francis of the Holy Cross, Bay Settlement.

#### SR. MARY JO KIRT FUND FOR MOUNT TABOR RETREAT CENTER

Established in memory of Sister Mary Jo Kirt to honor her leadership and direction by providing for the greatest needs of Mount Tabor Retreat Center, Inc.

#### SS. PETER & PAUL LEGACY FUND, GREEN BAY

Established to provide financial support for maintenance, capital requirements and the continued existence of Ss. Peter & Paul Parish. Additional gifts are most welcome.



**SS. PETER & PAUL PARISH FUND,  
HORTONVILLE**

Established for the greatest needs of the parish with a sub-account for specified contributions for the purpose of education needs such as curriculum improvement, and tuition assistance. Also provides for capital improvements.

**ST. ANTHONY PARISH ENDOWMENT, NEOPIT**

Established to honor the memory of Robert Fiedler. To support and assist St. Anthony Parish, Neopit, in its mission by providing supplemental funding for its programs and services or areas of greatest need.

**ST. ANTHONY PARISH FUND, OCONTO FALLS**

Established for the greatest needs of St. Anthony Parish

**ST. CHARLES BORROMEIO FUND**

Established from a bequest from Reverend Charles W. Mocco to provide scholarships and general assistance to the Seminarians of the Diocese of Green Bay, Wisconsin.

**ST. EDWARD PARISH ENDOWMENT, MACKVILLE**

Support and assists St. Edward Parish in its mission by providing supplemental funding for its programs and services; assists in the Catholic educational programs; and supports its operations, maintenance, capital requirements and continued existence.

**ST. FRANCIS & ST. MARY PARISH FUND,  
BRUSSELS**

Established for the greatest needs of St. Francis and St. Mary Parish in Brussels.

**ST. FRANCIS XAVIER CATHEDRAL FUND,  
GREEN BAY**

Established by Darlene & Donald J. Long, Sr. for the greatest needs of St. Francis Xavier Cathedral.

**ST. JOHN NEPOMUCENE PARISH & SCHOOL  
ENDOWMENT, LITTLE CHUTE**

Supports and assists St. John Nepomucene Parish in Little Chute in its mission by providing supplemental funding for its programs and services, or any areas of the parish's greatest need.

**ST. JOHN NEPOMUCENE PARISH  
ENDOWMENT, LITTLE CHUTE**

Established through generous gifts from the Advancing the Mission Stewardship Campaign to promote Catholic education and to provide for the general needs and ongoing operations of St. John Nepomucene Parish.

**ST. JOHN THE BAPTIST PARISH  
ENDOWMENT, HOWARD**

Established to provide support and assistance to St. John the Baptist Parish in its mission by providing funding for its programs and services; additional support for its operations, maintenance, capital requirements and continued existence.

**ST. JOSEPH SEMINARIAN FUND**

Educates, forms, trains and assists seminarians of the Diocese of Green Bay.

**ST. LOUIS GOOD NEIGHBOR FUND,  
DYCKESVILLE**

Established in memory of Lola Deadman who received excellent care from her neighbors, the Catholic Community of St. Louis Parish. This fund will benefit other neighbors in need of assistance as identified by a parish committee.

**JUD & MARY BETH FOWLER ENDOWMENT  
FOR ST. MARGARET MARY PARISH, NEENAH**

Established by Jud & Mary Beth Fowler to help St. Margaret Mary Parish with its greatest needs.

**ST. MARY PARISH FUND, OSHKOSH**

Benefits the parish in its community outreach, for extraordinary expenses and for needs as determined by parish leadership of Most Blessed Sacrament Parish, Oshkosh (formerly St. Mary Parish.)

**ST. MARY PARISH CHRISTENSEN FUND,  
PESHTIGO**

Provides for the greatest and/or special needs of the parish.

**ST. MARY PARISH LEGACY LEAGUE  
ENDOWMENT, MENASHA**

Established as a permanent, growing trust to help meet long term future needs of the parish and for its financial stability.

**ST. NICHOLAS PARISH FUND, FREEDOM**

Helps the parish with its operations, maintenance, capital requirements and continued existence.

**ST. PAUL FACILITIES FUND, WRIGHTSTOWN**

Provides additional support for St. Paul Parish, Wrightstown, (now St. Clare Parish) for maintenance, capital requirements and continued existence.

**ST. WILLEBRORD OPEN  
DOORS, OPEN HEARTS  
FUND, GREEN BAY**

Provides programming and resources to continue the parish's "Open Doors, Open Hearts" ministry of caring for its diverse population, which includes all of God's children.

**ST. THOMAS THE APOSTLE  
PARISH ENDOWMENT,  
HUMBOLDT**

Established by a generous bequest from a former member of Ss. Cyril & Methodius Parish, one of the two parishes that formed St. Thomas the Apostle Parish, to benefit parish operations.

**THE GRACE M. LA VOY ENDOWMENT FUND  
FOR SEMINARIANS**

Established by the Grace M. La Voy Estate to provide scholarships for needy Roman Catholic seminarians.

**VIOLA L & EDMUND W. MILLER MEMORIAL FUND**

Established by the Viola L. and Edmund W. Miller family to benefit St. Joan of Arc Parish, Goodman, WI.

**Services**

**AFFORDABLE HOUSING INSTITUTE**

Established by the Donald J. Long, Sr. family to enhance the availability of affordable housing and home ownership in the greater Green Bay area.

**CAMP TEKAWITHA ENDOWMENT FUND**

Funds greatest needs of Camp Tekawitha, including scholarships, year-round building needs or summer programs. Additional gifts are most welcome!

**CATHOLIC CHARITIES  
ENDOWMENT**

This endowment assists Catholic Charities in reaching out to tens of thousands of people through more than 20 excellent programs such as but not limited to mental health counseling, child welfare services, family strengthening programs and budget counseling. Additional gifts are most welcome!

**COMMISSION OF  
CONSCIENCE, OLD ST.  
JOE'S PARISH, DEPERE**

The purpose of this fund is to initially provide support for the 'Commission of Conscience' program to enable post graduate students to provide public service and to allow current students and/or adults to participate in service trips.

**COMMUNITY OUTREACH TEMPORARY  
SERVICES (COTS), APPLETON**

This fund is established to provide support and assistance to the COTS Program in its mission by providing funding for its transitional shelter programs and services for the homeless in the Fox Valley. Additional gifts are most welcome!



#### GRELLINGER HALL ENDOWMENT, GREEN BAY

Supports the everyday operations, maintenance, capital requirements and continued programming of Grellinger Hall for retired priests in the Diocese of Green Bay.

#### HELEN DANOSKI CAMPAIGN FOR HUMAN DEVELOPMENT

Supplements local grants for the Diocese's Catholic Campaign for Human Development.

#### JEANETTE K CLARK FUND FOR CHILDREN SERVICES

Helps fund children's services of Catholic Charities; established through a generous bequest.

#### JOSEPH & MARGARET VANDEN HEUVEL ENDOWMENT FUND FOR CATHOLIC GIVING

This fund is to benefit children in the Catholic Diocese of Green Bay. It will equally benefit needy children through Catholic Charities, Camp Tekawitha camperships and tuition assistance for Catholic schools.

#### LEADERSHIP LEGACY ENDOWMENT FUND

Established by the family of Donald J. Long, Sr. in his memory as the Catholic Foundation's founding president. This fund will ensure the Foundation's future. Additional gifts are most welcome!

#### MARIE D. & DENIS J. GAROT ENDOWMENT FOR CATHOLIC CHARITY

The fund is designed to carry on a tradition of giving to Catholic and community charities, which we wish to continue well into the future. Specifically Holy Name Retreat House, services for the blind and deaf communities and our parish, St. Agnes, Green Bay, by providing our Catholic newspaper, The Compass.

#### MONICA MEYER RESPECT LIFE ENDOWMENT

Established by a generous bequest from the Monica Meyer estate for a Respect Life Anti-Abortion Program in the Diocese of Green Bay.

#### NAZARETH FUND

Helps children and families in the Diocese of Green Bay. Established by Bishop Robert J. Banks through a generous bequest from the Jeanette K. Clark Estate.



**PAUL'S PANTRY ENDOWMENT**

Established by the Donald J. Long, Sr. family to care for the poor served by Paul's Pantry in Green Bay. Additional gifts are most welcome!

**POOR & HOMELESS FUND**

Assists the poor and homeless of the Diocese of Green Bay.

**REGINA & DOMINIC OLEJNICZAK ENDOWMENT**

Benefits Catholic Adoption Services through Catholic Charities of the Diocese of Green Bay.

**ST. AGNES PARISH, ST. VINCENT DEPAUL SOCIETY FUND, GREEN BAY**

Promotes charitable giving to and support of the mission of St. Agnes Parish's St. Vincent De Paul Society Conference.

**ST. MARY'S HOSPITAL 'A WOMAN'S PLACE' FUND**

Helps fund operations or capital expenses of "A Woman's Place" drop-in center in Green Bay. Additional gifts are greatly appreciated.

**ST. PATRICK PARISH ENDOWMENT, GREEN BAY**

Established by the Donald J. Long, Sr. family to care for the poor served by St. Patrick Parish in Green Bay. Additional gifts are most welcome!

**STEPHEN H. ECKES FUND FOR CATHOLIC CHARITY**

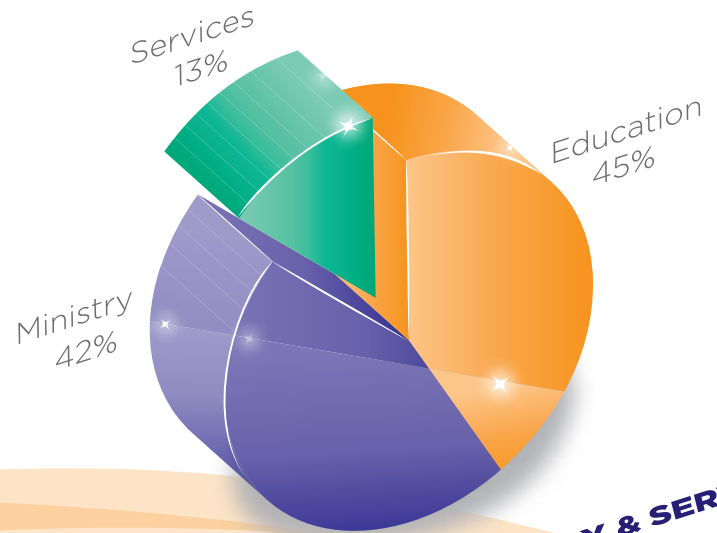
Established through a generous gift from the Stephen Eckes estate to continue Catholic charitable giving.

**THRESHOLD OF HOPE DESIGNATED FUND**

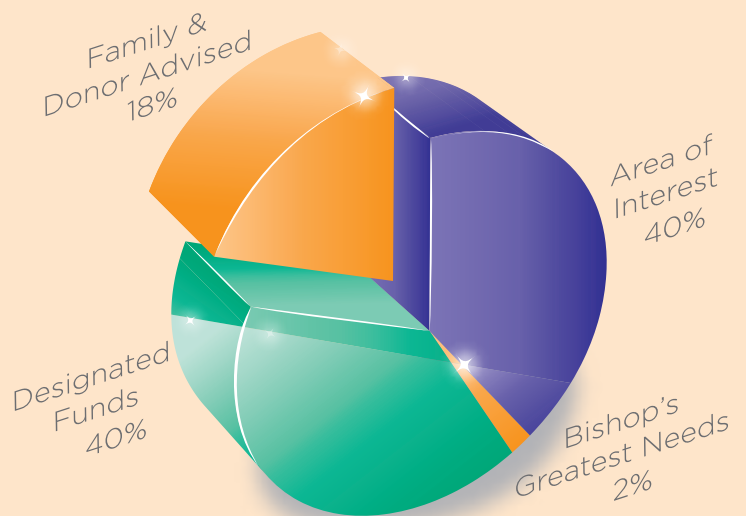
Provides support to homeless individuals whose needs are not served by other social service agencies in the Brown County area. Special emphasis and support shall be given to the ministry and operations of St. John the Evangelist Homeless Shelter.

**WISCONSIN RIGHT TO LIFE EDUCATION/ VERITAS SOCIETY FUND**

Established to provide the Wisconsin general public with an extensive pro-life education to save lives from abortion and to achieve a lasting culture of life.



**EDUCATION, MINISTRY & SERVICES**



**DESIGNATED FUNDS**

2010 – 2011

# CATHOLIC FOUNDATION

FOR THE DIOCESE OF GREEN BAY, INC.

## Board of Directors

BISHOP DAVID L. RICKEN

*Chairman, Diocese of Green Bay*

MARY G. SCHAUPP

*President, Green Bay*

DEACON TIMOTHY REILLY

*Vice President of Operations,  
Diocese of Green Bay*

DENNIS J. LONG

*Vice President, Oshkosh*

SUSAN M. OL MSTED

*Treasurer, Green Bay*

GERALD “GERRY” MILLER

*Secretary, Combined Locks*

JOHN CAVIL

*Green Bay*

KERRY DESTINO

*Green Bay*

TERENCE “TERRY” FOX

*Manitowoc*

PATRICK HASTINGS

*Combined Locks*

W. PAUL JONES

*Oneida*

KARMEN LEMKE

*Kaukauna*

ROBERT “BOB” ROSS

*Brussels*

PAUL J. SCHNEIDER

*Green Bay*

SISTER MYRA JEAN

SWEIGART, OSF

*Manitowoc*

TODD C. THIEL

*Sherwood*

BRIAN WALLACE

*Appleton*

## BOARD MEMBERS EMERITUS

Michael Ariens

*Brillion*

Deacon James Asmuth

*Neenah*

Most Reverend Robert Banks

*Green Bay*

Robert Endries

*Brillion*

Alfred “Fritz” Ganther

*Oshkosh*

Judy Howald

*Green Bay*

Lewis Konop

*Green Bay*

Donald Long Sr.†

*Green Bay*

Bishop Robert Morneau

*Green Bay*

Paul Schierl

*Green Bay*

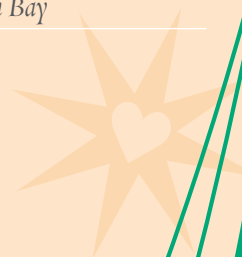
Arthur Schmidt

*Appleton*

Marianne Van Drisse

*Green Bay*

†Deceased



# DISTRIBUTIONS 2010 – 2011

## Unrestricted

Allouez Catholic Cemetery .....	\$8,000
Bishop's Appeal .....	\$14,246
Compass Newspaper .....	\$5,000
Dominican Republic Mission Chapel .....	\$5,000
Sisters of Saint Francis of the Holy Cross .....	\$25,000
Theological Bible Course, Pontifical University of Mexico .....	\$1,000
<b>UNRESTRICTED TOTAL .....</b>	<b>\$58,246</b>

## Donor Advised

A+A Alexandrina Center Ltd. ....	\$400
Bishop's Appeal .....	\$8,200
Boy Scouts of America - Bay Lakes Council .....	\$500
Catholic Relief Services, Baltimore, MD .....	\$15,000
Diocese of Green Bay - Blind & Deaf Community Services .....	\$26,376
Diocese of Green Bay - Catholic Charities .....	\$1,400
Diocese of Green Bay - Marian Eucharistic Conference .....	\$1,000
Diocese of Green Bay - Respect Life Services .....	\$91,299
Diocese of Green Bay - Stewardship & Pastoral Services .....	\$2,000
Diocese of Green Bay Seminarians in Memory of Margaret Girotti Anshus .....	\$5,000
Discalced Carmelite Friars Mission – Kenya, Africa .....	\$5,000
Divine Savior School System .....	\$9,350
Dominican Republic Mission, Elias Piña .....	\$26,376
Golden House .....	\$500
Holy Name Retreat House, Chambers Island .....	\$26,376
Leadership Convocation Speaker .....	\$2,000
Legacy Society - Catholic Foundation .....	\$4,000
Missionaries of Charity - Mother Teresa .....	\$5,000
Mount Tabor Center, Menasha .....	\$1,500
National Office of Post Abortion Reconciliation & Healing, Milwaukee .....	\$20,250
NEW Community Clinic & Shelter, Inc. ....	\$500
Notre Dame de la Baie Academy, Green Bay .....	\$1,000
Our Lady of Lourdes Parish, DePere .....	\$1,200
Paul's Pantry .....	\$500
Relevant Radio .....	\$102,300
Respect Life Ministry .....	\$2,500
Salvatorian Mission Warehouse, New Holstein .....	\$6,000
School Sisters of St. Francis, Milwaukee .....	\$15,268
Sisters of St. Dominic, Racine, WI .....	\$3,000
St. Anthony Parish, Neopit .....	\$500
St. Francis Xavier Cathedral .....	\$12,500
St. John Nepomucene Parish & School, Little Chute .....	\$125,000

St. John Nepomucene Parish, Little Chute	\$43,000
St. John the Evangelist Homeless Shelter, Green Bay	\$3,023
St. Mary Parish, Clarks Mills	\$25,000
St. Nicholas Parish, Freedom	\$25,000
St. Norbert College, DePere	\$5,000
St. Paul's University Catholic Center, Minnesota	\$5,000
St. Vincent DePaul Society	\$400
Stephen H. Eckes Fund for Catholic Charity, Catholic Foundation	\$10,000
The Compass Newspaper	\$26,376
Xavier High School Scholarship Endowment, Catholic Foundation	\$10,000
<b>DONOR ADVISED TOTAL</b>	<b>\$674,594</b>

## Education

ACES/Appleton Catholic Educational System	\$3,338
Christmas Stars Anna Leitermann Memorial Scholarship	\$327
Green Bay Area Catholic School System, Inc. (GRACE)	\$45,943
Holy Family Parish, Brillion	\$10,095
Holy Spirit School in Memory of Fr. Donald Fuller	\$9,256
Kaukauna Catholic School System	\$42,087
Lumen Christi	\$663,503
Nancy Rivas Memorial Scholarship	\$1,500
Notre Dame de la Baie Academy, Green Bay	\$5,793
Sacred Heart Parish Elementary Education	\$876
Sacred Heart Seminary, Green Bay	\$2,538
Ss. Peter & Paul Education, Green Bay	\$8,619
St. John the Baptist Parish School, Howard	\$8,377
St. Anthony Catholic School, Oconto Falls	\$3,587
St. Bernard Scholarships, Green Bay	\$8,750
St. John Bosco School, Sturgeon Bay	\$3,554
St. John Nepomucene Elementary School, Little Chute	\$64,624
St. Joseph/Holy Family Secondary Education, Phlox	\$6,000
St. Margaret Mary School, Neenah	\$876
St. Mary Central High School, Neenah	\$37,629
St. Mary Parish Education, Peshtigo	\$7318
St. Paul Catholic Education, Wrightstown	\$2,743
St. Thomas More Catholic School, Green Bay	\$2,214
Unified Catholic Schools of Oshkosh	\$64,832
Xavier High School Fine Arts Program, Appleton	\$3,338
Xavier High School Scholarships, Appleton	\$2,250
Xavier High School Tuition Assistance, Appleton	\$8,000
<b>EDUCATION TOTAL</b>	<b>\$1,017,967</b>

## Ministry

A New Genesis Community	\$1,360
ASPIRO	\$29,318
Advancing the Mission - Evangelization Grants	\$77,928
Advancing the Mission - Evangelization Fund	\$447
Advancing the Mission - Leadership Development Grants	\$114,282

## DISTRIBUTIONS 2010 – 2011 CONT'D

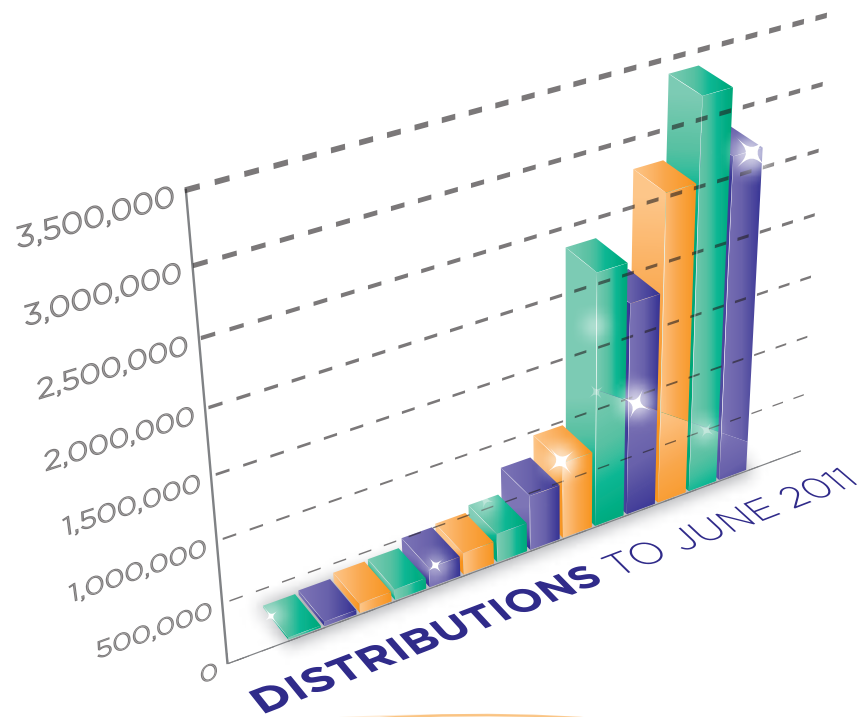
Advancing the Mission - Leadership Development Fund	\$447
Advancing the Mission - Lifelong Catechesis Grants	\$76,068
Advancing the Mission - Lifelong Catechesis Fund	\$447
Advancing the Mission - Priestly Care - Leo Benevolent Association	\$76,451
Advancing the Mission - Priestly Care Fund	\$448
Bishop Wycislo Center of St. Francis Xavier Cathedral, Green Bay	\$2,266
Bishop's Greatest Needs Fund	\$754
Camp Tekawitha, Loon Lake, Shawano	\$2,119
Casa Hogar Del Nino De Cabo, San Lucas	\$500
Catholic Foundation Operating Fund	\$901
Diocese of Green Bay - Lay Ministry Formation	\$3,294
Discalced Carmelite Nuns, Denmark	\$4,601
Dominican Republic Mission, Elias PiDa	\$3,834
Holy Family Parish, Marinette	\$5,011
Holy Spirit Parish Stained Glass Windows, Darboy	\$895
Holy Spirit Parish, Darboy	\$5,445
Leo Benevolent Society Memorial Masses	\$120
Missionary Oblates, Our Lady of the Snows, Belleville, IL	\$500
Mount Tabor Center, Menasha	\$7,418
Priest Sabbaticals	\$1,300
Prince of Peace, Green Bay in Memory of Fr. Leo Przybylski	\$1,521
Relevant Radio	\$49,720
Sacred Heart Parish, Red Granite in Memory of Fr. Leo Przybylski	\$1,521
Sacred Heart Seminary	\$49,658
Shrine of Our Lady of Good Help	\$1,413
Sisters of St. Francis of the Holy Cross	\$1,635
Sisters of St. Joseph of Carondelet, St. Louis, MO	\$500
Ss. Peter & Paul Parish, Hortonville	\$1,080
Ss. Peter & Paul Parish, Hortonville in Memory of Fr. Leo Przybylski	\$1,521
St. Anne Parish, Coleman in Memory of Fr. Leo Przybylski	\$1,521
St. Anthony Parish, Neopit	\$440
St. Anthony Parish, Oconto Falls	\$3,138
St. Edward Parish, Mackville	\$1,338
St. Francis & St. Mary Parish, Brussels	\$7,500
St. Joan of Arc Parish, Goodman	\$1,560
St. John Nepomucene Parish & School, Little Chute	\$23,150
St. John Nepomucene Parish, Little Chute	\$6,945
St. John Parish, Menasha in Memory of Fr. Leo Przybylski	\$1,521
St. John the Baptist Parish, Howard	\$8,914
St. Louis Parish, Dyckesville	\$71,415
St. Margaret Mary Parish, Neenah	\$2,721
St. Mark Parish, Red Granite in Memory of Fr. Leo Przybylski	\$1,521
St. Mary of the Angels Parish, Green Bay	\$251
St. Mary of the Angels Parish, Green Bay in Memory of Fr. Leo Przybylski	\$1,521
St. Mary Parish, Peshtigo	\$2,000
St. Nicholas Parish, Freedom	\$11,566
St. Norbert College Parish/Old St. Joe's in Memory of Maggie Sullivan	\$2,289



St. Thomas the Apostle Parish, Humboldt.....	\$1,946
St. Vincent DePaul Society .....	\$1,819
Zambia Well Project .....	\$8,250
<b>MINISTRY TOTAL.....</b>	<b>.\$686,049</b>

### Services

Catholic Charities Adoption Services .....	\$1,814
Catholic Foundation Operating Fund .....	\$1,470
Diocese of Green Bay - Campaign for Human Development.....	\$3,128
Diocese of Green Bay - Respect Life Services .....	\$13,691
Diocese of Green Bay - St. Therese of the Little Flower Inc. - Technology .....	\$91,298
Grellinger Hall.....	\$15,395
Knights of Columbus Project Youth.....	\$2,166
St. Patrick Parish Food Program.....	\$7385
Paul's Pantry .....	\$8,458
Salvatorian Mission Warehouse .....	\$6,249
St. Louis Parish, Dyckesville Good Neighbor Recipient.....	\$500
St. Norbert College Parish/Old St. Joe's Mission Trips .....	\$5,704
Wisconsin Right to Life/Veritas Society .....	\$6,155
<b>SERVICES TOTAL .....</b>	<b>.\$163,414</b>
<b>TOTAL DISTRIBUTIONS 2010-2011 .....</b>	<b>.\$2,600,269</b>



1997-98	\$	17,000	2004-05	\$	456,814
1998-99	\$	36,801	2005-06	\$	633,035
1999-2000	\$	79,184	2006-07	\$	2,042,921
2000-01	\$	88,255	2007-08	\$	1,724,709
2001-02	\$	162,876	2008-09	\$	2,479,903
2002-03	\$	182,861	2009-10	\$	3,104,799
2003-04	\$	239,294	2010-11	\$	2,600,270

## CONDENSED STATEMENT OF FINANCIAL POSITION

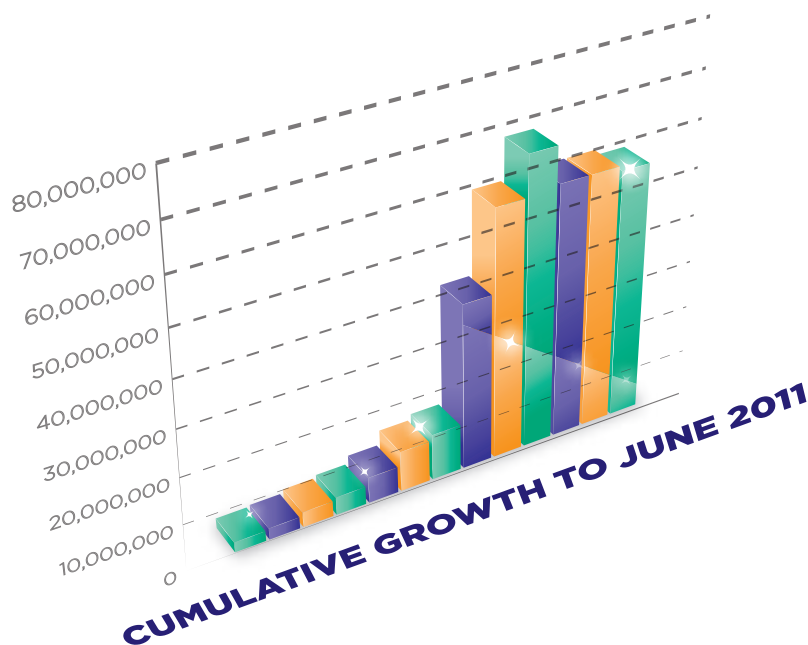
		<i>June 30, 2011</i>	<i>June 30, 2010</i>
ASSETS	Cash and Investments	\$57,138,570	\$46,042,104
	Accounts Receivable	2,272,080	-
	Gifts receivable	2,210,526	6,642,773
	Other	504,692	417,800
		<u>\$62,125,868</u>	<u>\$53,102,677</u>
LIABILITIES	Accrued expenses	\$213,361	\$191,201
	Custodial Funds	13,252,091	8,576,964
	Pledges Payable	66,825	86,628
		<u>\$13,532,277</u>	<u>\$8,854,793</u>
NET ASSETS		<u>48,593,591</u>	<u>44,247,884</u>
TOTAL LIABILITIES & NET ASSETS		<u>\$62,125,868</u>	<u>\$53,102,677</u>

## CONDENSED STATEMENT OF ACTIVITIES

<i>Year Ended June 30, 2011</i>		<i>June 30, 2011</i>	<i>June 30, 2010</i>
REVENUES, INVESTMENT GAINS AND OTHER SUPPORT	Contributions	\$6,791,310	\$6,819,906
	Management fees	332,980	330,696
	Total return on investments	5,413,723	2,331,007
		<u>\$12,538,013</u>	<u>\$9,481,609</u>
EXPENSES	Grants *	\$6,994,659	\$9,239,899
	Management and general	214,398	200,645
	Fundraising	983,249	1,017,357
		<u>8,192,306</u>	<u>10,457,901</u>
CHANGE IN NET ASSETS		<u>\$4,345,707</u>	<u>\$(976,292)</u>

\* Does not match total distributions due to payments from custodial funds, pledge payments and amortization of discounts.

A complete audit is available upon request.



1999	\$ 2,133,963	2006	\$ 35,175,000
2000	\$ 2,432,802	2007	\$ 52,275,710
2001	\$ 3,224,815	2008	\$ 60,626,275
2002	\$ 3,799,548	2009	\$ 53,139,945
2003	\$ 5,535,121	2010	\$ 53,102,677
2004	\$ 8,632,412	2011	\$62,125,868
2005	\$ 9,846,031		



## PLANNED GIVING

Planned giving is the act of making a charitable contribution where the method and timing benefit both the recipient and the contributor. The recipient can make long-range plans while relying on a dependable source for future funding. And the donor can reap numerous benefits: income tax incentives, guaranteed lifetime income, reduction or elimination of estate taxes, and the satisfaction of making an important charitable gift to a worthy cause, to name just a few.

The possible ways of financing a planned gift are nearly limitless.

They include:

- Paid-in-full, whole-life insurance policies
- Stocks, bonds, securities
- Real estate, including income producing property
- Works of art, special collections
- Retirement plans
- Mineral or timber rights
- Purchase of endowment life insurance policies
- Business assets

*For more information on planned giving, contact Cindi K. Brawner at [CBrawner@gbdioc.org](mailto:CBrawner@gbdioc.org)*

### Planned Giving Options

#### CHARITABLE WILL BEQUEST —

Bequeath gifts of real estate, cash, or other property as a last will and testament with the knowledge that it will benefit a charitable cause.

**CHARITABLE LIVING WILL —** Provide for eventual gifts of real estate, cash or other property knowing that all or part of the assets may be returned upon request.

**CHARITABLE GIFT ANNUITY —** Receive fixed annual payments for life which, for a period of time, may be partially free of taxes as well as an initial income tax reduction.

**CHARITABLE REMAINDER TRUSTS —** May bypass capital gains tax at the time the trust is created, and may receive federal estate tax savings.

**CHARITABLE LEAD TRUST —** Transfer assets to heirs with little or no real estate and gift taxes.

**LIFE INSURANCE POLICIES —** After a policy is no longer needed for its intended use, feel the satisfaction of giving to a charitable beneficiary.

**ENDOWMENT LIFE INSURANCE POLICIES —** Make a charitable gift to an organization which purchases policy in donor's name. When policy becomes self-funding, it is then designated to a beneficiary consistent with donor's wishes.

**GIFTS OF APPRECIATED PROPERTY —** Includes real estate, personal property, pension or retirement funds, and stocks and marketable securities.

# CATHOLIC FOUNDATION STAFF



Cindi K. Brawner



Josh Diedrich

Cindi K. Brawner, *Executive Director*

Josh Diedrich, *Assistant Director*

Janice Compton, *Management Assistant*

Debbie DeGrave, *Database Administrator*

Lindsay Draz, *Administrative Assistant*

Mary Jane Heim, *Data Entry*

Lois Kitzman, *Data Entry*

Margie Sunnicht, *World Missions Coordinator*

Claire Teitz, *Data Entry*

Pat Von Haden, *Administrative Assistant*

*Member:*

National Catholic Leadership Roundtable

*Credits:*

Design by Conard Creative Group, LLC

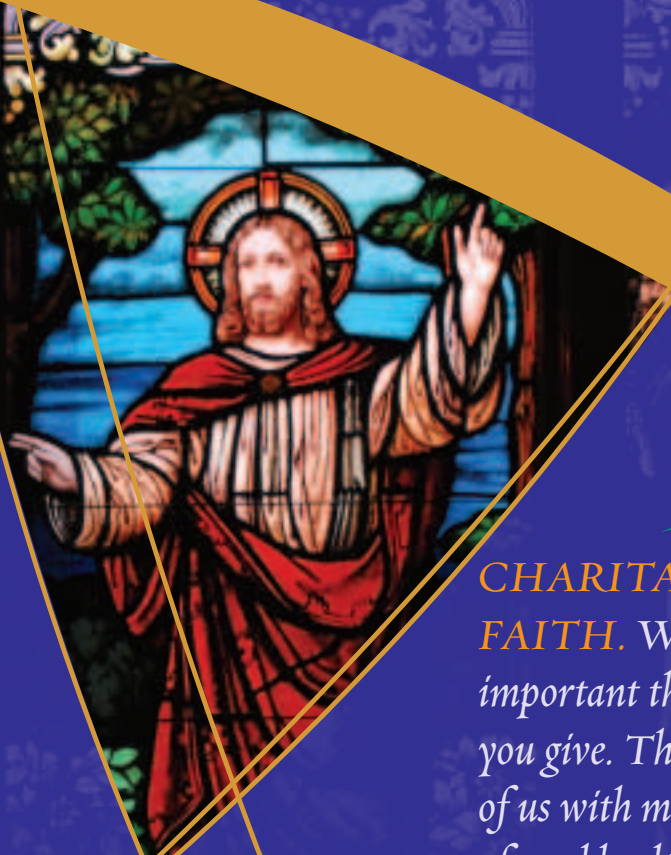
Printing partially donated by Independent Printing

The Catholic Foundation for the Diocese of Green Bay, Inc. Federal Tax ID # EIN 39-1924921

The material contained herein is not intended as legal advice or a substitute for such advice. The rules and regulations governing charitable Endowments and Planned Gifts are numerous and quite complex. The Catholic Foundation for the Diocese of Green Bay, Inc. recommends that anyone planning to make a contribution seek professional counsel which may be obtained from a lawyer, certified public accountant, trust officer and life insurance and investment professional who has experience and knowledge in estate and financial planning. Your gift is tax deductible to the extent allowed by law, as the Catholic Foundation for the Diocese of Green Bay, Inc. is a Tax Exempt Organization under section 501 (c)(3) of the Internal Revenue Code, pursuant to United States Catholic Conference Group Exemption.

The Catholic Foundation  
for the Diocese of Green Bay, Inc.  
PO Box 22128  
Green Bay, WI 54305-2128

NON PROFIT ORG.  
U.S. POSTAGE  
**PAID**  
GREEN BAY, WI  
PERMIT NO. 104



*CHARITABLE giving is an act of FAITH. What you GIVE is less important than the SPIRIT in which you give. The LORD has blessed each of us with many GIFTS in life — gifts of good health and talents which have allowed us to CARE for ourselves and others. As faithful stewards of these gifts, please consider GIVING back in GRATITUDE for receiving them.*



**Catholic Foundation**  
*for the Diocese of Green Bay, Inc.*

P.O. Box 22128 • Green Bay, WI 54305-2128 • Telephone: 920-272-8173 • Fax: 920-272-8435  
E-mail: [Catholicfoundation@gbdioc.org](mailto:Catholicfoundation@gbdioc.org) • [www.Catholicfoundationgb.org](http://www.Catholicfoundationgb.org)