

Our promise



*... to future
generations*

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.



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Dear Sisters and Brothers in Christ,

God showers each of us with wonderful blessings each day. Some of these blessings are visible and others are small, silent gifts that pass us by without notice. Sometimes these little blessings happen when we use our gifts to serve one another. This reminds me of the parable of the mustard seed in the Gospel of Luke where a small seed grows into a large bush.

In many respects the Catholic Foundation began in the same way as a small group of people sharing their love of the Church with a gift. This gift has grown and has been an example to others to share their gifts and today the Catholic Foundation manages \$53,000,000 and distributes over \$2,400,000 to ministries and individuals throughout the Diocese.

Since I arrived here in the summer of 2008, I have been continually impressed by the spirit of stewardship in the Diocese. Over the last year, our Church has sheltered the poor, cared for those hurting from a loss of a loved one and welcomed 10 new men into the seminary.

Through endowments the Catholic Foundation provides a tremendous impact in each of these areas. Catholic Charities endowment fund distributed \$13,625 last year to help fund services that reach thousands of people in need.

As you read through this annual report, please pray about how God is calling you to share the gifts He has so generously given you. Maybe God is calling you to support the Foundation Legacy Society or to remember a Foundation endowment fund in your will and estate plans.

Thank you and may God bless you abundantly and reward you for the faith we believe in.

Sincerely yours in Christ,

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

Dear Friends,

As we age, the questions we may ponder are “How do I want to be remembered?”



“Who and what have I loved during my lifetime?” and even “How will my love continue?” These are the kinds of questions that keep people up at night!

For everyone who recognizes God as owner of all, knows we are simply caretakers of all He has blessed us with. We understand the concept of Stewardship as a Way of Life. A natural conclusion of a life of stewardship is a thoughtful plan for the use of those worldly goods bestowed on us during our lifetime. At the Catholic Foundation we have seen people who leave a legacy of those gifts they’ve been given. They express their love and appreciation to those family members, friends and organizations who have blessed their lives.

By leaving a bequest in their will or estate plan they are able to demonstrate their love will continue. No matter what the size of the gift—large or small, it is the intention that is important. It is a beautiful way to pass on our values and demonstrates to our children and grandchildren the importance of faith in our lives. There are many creative ways to increase the benefits of giving both during life and at death. Life insurance policies, charitable gift annuities and other types of trusts are all possible ways to make sure your love of family and those charitable organizations continue.

This year marked the last of four active years of the Advancing the Mission Stewardship campaign, although some pledges will continue to be paid into 2012. The generosity of 27,000 faithful who made gifts and pledges totaling more than \$39 million to benefit parishes and the four major endowments of the campaign will leave a legacy for all future generations of the Church of Green Bay. Leadership development, evangelization, lifelong catechesis and priestly retirement care will all flourish in our diocese by the gifts made which will continue forever.

Please join us as we promote the idea of Stewardship as a Way of Life to everyone throughout the diocese—it will allow us to answer those haunting questions of passing on the love during our lifetime to future generations. Call us if you would like help as you consider your legacy.

God bless you and all those whom you love.

Bob Enders Cindy K. Brawner

President

Executive Director

Advancing the Mission

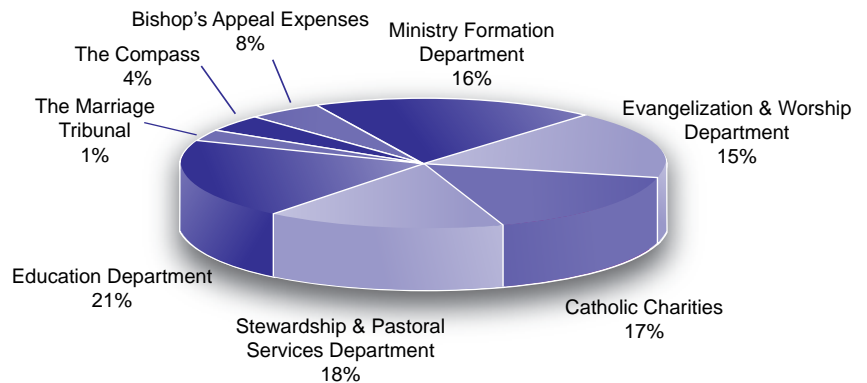


The Advancing the Mission Stewardship campaign, which began in 2006, helped fund five initiatives designed specifically toward planning for the future of parishes and the Diocese of Green Bay. The campaign allows us to provide grants to parishes and individuals in the areas of leadership development, evangelization, education and priestly retirement care. Over 14,000 parishioners were involved in the campaign and Advancing the Mission raised \$39,600,000 to benefit our parishes and Diocese. We are grateful for the prayers and efforts of all who have supported the campaign.

Bishop's Appeal 2009 Distributions

Bishop's Appeal

Each year thousands of people across northeastern Wisconsin come together and share their love of Christ by supporting of the Bishop's Appeal. The Appeal is an annual fundraising campaign conducted by the Catholic Foundation to benefit more than 300,000 people served by the Church. These diocesan ministries impact children in Catholic schools and religious education programs, adults eager to learn more about the Catholic faith and over 40,000 people served through Catholic Charities. The 2009 Bishop's Appeal raised \$4,600,000 and was distributed to diocesan departments.





Lumen Christi

In 1988, the Lumen Christi campaign was established to benefit Catholic education. Since then more than \$3.5 million has been distributed to parish religious education programs; Catholic schools have received more than \$5.4 million; \$2.2 million has been given to educational leaders as scholarships to help fund their professional and academic development. As of June 30, 2009, the total value of the Lumen Christi endowment of the Catholic Foundation is more than \$9.6 million.

Specialized Fundraising

The Catholic Foundation for the Diocese of Green Bay serves as a development resource for many other ministries within the diocese including The Shrine of Our Lady of Good Help, Camp Tekawitha and Holy Name Retreat House. If you are interested in sending a needy child to summer camp, supporting the wonderful ministry at the Shrine or helping to continue retreats for people on Chambers Island, please let us know. We would love to work with you.

World Missions

“Those who are in a position to help others will realize that in doing so they themselves receive help ...”
- Pope Benedict XVI, *God is Love*



World Mission Services promotes the missionary spirit of Jesus Christ by fostering programs of global awareness and encouraging Catholics in their baptismal call to missionary activity.

Helping yourself and the Church through a Charitable Gift Annuity



*Left: Fr. Nickel &
Right: Fr. Rickert*

As senior priests in the Diocese of Green Bay, Fathers Leander Nickel and William Rickert wanted a steady income to help them meet their needs in retirement.

“When you get older you have more expenses for pills and all kinds of health problems,” Father Rickert said.

They also wanted something safe with a good rate of return that would help the Church. So they were among the first to buy charitable gift annuities from the Catholic Foundation for the Diocese of Green Bay.

“I once bought some annuities from another place and I lost most of that money, about nine, ten years ago. They paid annuities for two years and after that they said they went broke,” Father Nickel said. “Since then I buy annuities only from Catholic organizations.”

Checks from the Catholic Foundation come regularly, they said. Plus they like knowing that after they die the money they invested will be used for good causes.

“The diocese knows where to put the money,” Father Rickert said.

One of those places, Father Nickel, said is the education of seminarians, who as priests will serve the Church for decades to come.

In this Year for Priests they see a need to help the diocese look to the future and to remind people that “priests come from good Catholic families, not from a factory,” Fr. Nickel said.

“We’ve been in these charitable gift annuities a long time,” Father Rickert said. “Anybody who isn’t in here should take note.”

The Mount Tabor Center Changing Lives, One Kid at a Time

Eden Foord sees it several times a year. As high school students arrive at Mount Tabor Center in Menasha for the required Confirmation retreat several express their dissatisfaction — in attitude or word.

Then the activities begin, such as asking them to write their temptations on slips of blue paper that represent the river of temptation, says Foord, director of the only staffed youth retreat center in the Diocese of Green Bay.



Youth then hear how the faith — Mass, where Christ is truly present, Scripture and service to others — can help them overcome temptation. They write these aspects of faith on cardboard pizza rounds and use them as stepping stones to cross the river, Foord says.

“Once they start into these activities, and hear the witnesses, you can see that God is working on them and they begin opening up. Many times students who are totally closed coming in leave saying, ‘This was the best experience of my life’ and giving us hugs and high-fives on the way out.”

About a month after one retreat, a man told Foord that his niece had been involved with pornography, parties and drugs until going on the retreat. “We hear many stories like that,” Foord says.

Two Catholic Foundation funds benefit Mount Tabor Center. The Clarence Wallace family started one years ago. The other, in memory of Sister Mary Jo Kirt, a former Center director, began last fall.

In 2003-04, Foord’s first year, the center did 40 retreats for 1,000 students. Last year that had grown to 100 retreats for more than 3,000 students, requiring more staff and a larger budget.

“These fund disbursements are vital, especially as we’ve grown,” Foord says.

Legacy Society 2008-2009

The Catholic Foundation Board of Directors recently voted to change the name of the Leadership Society to the Legacy Society. They thought it better captured the essence of what the group helps us to do. The main thing our almost 100 members have in common is their support of the Foundation's efforts to encourage others to leave a legacy. These legacies take many forms, outright bequests, charitable gift annuities, life insurance policies and various charitable trusts.

Surprisingly, in the United States today, more than 80% of individuals make a gift to charity each year, yet fewer than 10% make plans to continue their important help with a gift in their will or estate plan. They just don't consider leaving a legacy.

By taking the important step to remember your parish, school or other special charity with a legacy gift – you truly become the promise to future generations.

The promise is to share our faith in God and our Catholic values with those who come after us. It is with this purpose in mind we encourage an annual gift of \$1,000 to the Legacy Society to help others carry on their charitable intentions with a lasting legacy.

Anonymous (3)	Reverend Monsignor Paul P. Koszarek	Deacon & Mrs. Timothy G. Reilly
Mr. & Mrs. Michael S. Ariens	Donald & Carol Kress*	John & Janet Van Den Wymelenberg Foundation
Mr. & Mrs. William R. Arndt	Mrs. Julie-Anne Kress	Mr. & Mrs. Hans Schaupp
Mr. & Mrs. Errico Auricchio	Dr. & Mrs. Paul A. Larson	Mark & Patricia Schick
Mr. & Mrs. Stephen J. Baisch	Mrs. Phyllis L. Leach	Mr. & Mrs. Paul J. Schierl
Most Reverend Robert J. Banks	Mr. & Mrs. David L. Lee*	Mr. & Mrs. Robert M. Schindhelm
Mr. & Mrs. Gary F. Bernegger	Mr. & Mrs. Donald F. Liebmann	Mr. & Mrs. Arthur J. Schmidt
David & Cindi Brawner	Mrs. Darlene M. Long	Mr. & Mrs. Charles Schuster
Mr. & Mrs. Gerald G. Censky	Mr. & Mrs. Dennis J. Long	Mr. & Mrs. Linus M. Stoll
Mr. & Mrs. William C. Censky	Mr. & Mrs. Thomas J. Lopina Sr.	Mr. & Mrs. Peter H. Thomson
H.B "Nick" Conlon*	Deacon & Mrs. Lawrence Mastalish	Dr. & Mrs. Francis B. Vande Loo
Mr. & Mrs. James L. Cummings	Mr. & Mrs. Michael J. McClone	Dr. Pam Vanderwall
Robert & Patricia Endries*	Mr. & Mrs. Gerald Miller	Dr. & Mrs. Donald L. Wackwitz
Mr. & Mrs. Judson E. Fowler	Mr. & Mrs. Jay M. Minorik	Ms. Darlene M. Ward
Terence & Paula Fox	Mr. & Mrs. Mark Mullins	Mr. & Mrs. James Williamson
Mr. & Mrs. Alfred R. Ganther Jr.	Reverend Leander F. Nickel	Mr. & Mrs. Jerome Wolf
Mr. & Mrs. Paul O. Gehl	Mr. & Mrs. William Novak	
Dr. & Mrs. James N. Grace	Mr. & Mrs. Thomas A. Olmsted	
Bradley & Lori Hanus	Mr. & Mrs. Jeffrey M. Prickette	
Mr. & Mrs. George F. Hartmann	Mr. & Mrs. William A. Raaths	
Mr. & Mrs. Timothy J. Howald	Reverend Paul J. Radetski	
Dr. & Mrs. Robert Kaftan		
Mr. & Mrs. Patrick Klass		

* Five Year Membership

(While every attempt is made to insure the correctness of our listings and to correct any errors brought to our attention, we apologize for any omissions.)

Fund Descriptions



Unrestricted

Bishop's Greatest Needs

The diocesan Bishop decides which areas of greatest need receive help from this fund, which also serves as the Foundation's general 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 are most welcome!

Operating Fund

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



Donor Advised

Catholic Woman's Club of Green Bay

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

Goldie & Ethel Derenne Fund for Charity

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

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.

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 and sharing.

Long Family Fund for Catholic Charity

Established by the Long Family to support a variety of Catholic causes.

Lourdes Building Fund, Oshkosh

Established for capital needs of the Lourdes High School and St. John Neumann Middle School construction and renovation project.

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.

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.

Paul & Carol Schierl Donor Advised Fund

Established to facilitate Schierl Family charitable giving for Catholic endeavors.

Paul & Carol Schierl Tuition Assistance Fund

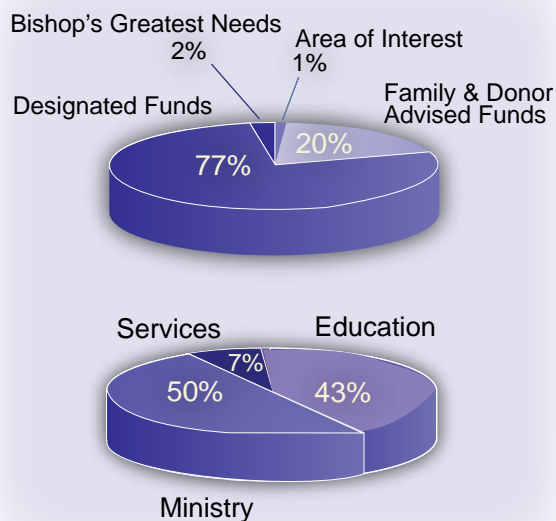
Provides tuition assistance to needy children for Catholic elementary school education.

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.

Schmidt Family Parish Vitality Fund

Established to help parishes create programs to revitalize their parish and attract new members.



Paul & Nicole Schneider Family Fund

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

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.

Walter S. & Mary Ann K. Wilinski Family Fund

Established to promote the 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.

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 high school senior Christmas Stars' member who is enrolled in a 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.



Father Donald Fuller Fund for Holy Angels Catholic School, Darboy

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.

John S. Grundman Scholarship Fund

This scholarship provides tuition for financially distressed students in the Oshkosh Catholic elementary and high schools, to include Lourdes High School.



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.

Joseph & Mary Schindler Family Fund

Provides tuition assistance to students in need at St. Mary's 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, Oshkosh.

Provides for the greatest needs of Lourdes High School in Oshkosh, to include general operations.

Lumen Christi

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.

George P. Mueller Endowment for St. Margaret Mary, Neenah

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 for Sacred Heart Parish, Sherwood

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

Norbert Koepfel Scholarship Fund

Benefits confirmed members of St. Joseph/Holy Family Parish in Phlox who are pursuing post secondary education.

Notre Dame de la Baie Academy Endowment

Established by the Darlene & Donald J. Long, Sr. family to benefit the programs and operations of Notre Dame de La Baie High School.

Open Skies Initiative Education Fund

Established by Bishop Robert J. Banks to provide educational scholarships to underprivileged children.

Oshkosh Unified Schools

Benefits the Unified Catholic School System of Oshkosh.

*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 accident in 2009. This fund will help a female, Hispanic senior-age high school student who has been accepted into an accredited program/college and like Nancy, have demonstrated an ability to overcome challenges and obstacles to achieve life and education goals.



Sacred Heart Tuition Assistance Endowment, Oshkosh

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. Ann's Catholic School Fund, St. Anna

Established to help the St. Ann's Catholic School children entering the Divine Savior Catholic School System.

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 Bosco Catholic School Endowment,
Sturgeon Bay*

Provides supplemental funding to support and assist the mission of St. John Bosco Catholic School and any future programs of the St. John Bosco Religious Education program for adults and children.



*St. John Nepomucene School Endowment,
Little Chute*

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

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. Joseph School Fund, Green Bay

Established to support St. Joseph Parish Catholic School in its mission.

St. Mary Parish Catholic Education Endowment, Hilbert

Supports and assists the St. Mary Catholic School and Religious Education Program for adults and children by providing supplemental funding for its programs and services to include, although not limited to, youth faith formation and adult ministry.

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 commissioned ministry program.

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. 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 Simon Family Endowment Fund

Reduces tuition to encourage parents to provide a Catholic education for their children. Also may benefit other Catholic charitable activities.

Edward & Margie Van De Loo Fund for Education

Created in memory of Edward & Margie Van De Loo to benefit the Kaukauna Catholic School System by tuition assistance to poor and deserving children attending the Kaukauna Catholic School System with first preference to the children of the Hollandtown area.

Total Catholic Education Endowment

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

Xavier High School Scholarship Endowment, Appleton

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



Ministry

American College of Louvain Endowment, Belgium

With your help we can meet the immediate needs of the historically rich American College at Louvain and maintain this seminary for future generations of young men studying for the priesthood.

Holy Family Parish Endowment, Marinette

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



Meister Seminarian Fund

Benefits the seminarians of the Diocese to honor the memory of the founders' son, Richard Meister.

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 welcome.

Claude P. & Bernice V. Allie Ministry Fund

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

Elizabeth M. Anderle Fund

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

R.J. & Bernice Baudhuin Estate for the Holy Name Retreat House

Established through the generosity of the R.J. & Bernice Baudhuin estates to benefit Holy Name Retreat House on Chambers Island. Additional gifts to the Holy Name Retreat House Endowment are most welcome!

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 as the Diocese determines the needs.

Maggie Sullivan Conlon Fund

Provides supplemental funding to support and assist St. Norbert College Parish/Old St. Joe's, De Pere, with its greatest needs and help carry out its mission.

Bishop Wycislo Fund for Lay Ministry Formation

Supplements funding for tuition and books to those in the Diocese in the Lay Ministry Formation program.

Goldie & Ethel Derenne Fund for St. Louis Parish, Dyckesville

This fund is intended to build a parish center/gathering area, if one is to be built or to be available to the parish for other capital improvements.

Dominican Republic Mission Fund, Elias Pina

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

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.

Health & Welfare Fund of 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.

Holy Angels Stained Glass Window Fund, Darboy

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

Holy Angels Parish Fund, Darboy

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

The Grace M. La Voy Endowment Fund for Seminarians

Established by the Grace M. La Voy estate to provide a scholarship for a needy Roman Catholic seminarian.

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 pastoral 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.

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.

Viola L. & Edmund W. Miller Memorial Fund

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

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.

A New Genesis Community Endowment Fund

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

Newman Center Building Fund, Oshkosh

Provides for the capital needs of the Oshkosh Newman Center.

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.

Sr. Mary Jo Kirt Fund for Mount Tabor Center

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

St. Anthony Parish Fund, Oconto Falls

Established for the greatest needs of St. Anthony Parish.

St. Francis & St. Mary Parish Fund, Brussels

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

St. Francis Xavier Cathedral Fund, Green Bay

Established by Darlene & Donald J. Long, Sr. for the Bishop Aloysius Wycislo Center's greatest needs. In the future, St. Francis Xavier Cathedral may use the annual proceeds for its greatest need.



St. John Nepomucene Parish Endowment, Little Chute

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

St. John Nepomucene Parish & School Endowment, Little Chute

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

St. Joseph Seminarian Fund

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

St. Margaret Mary Parish Fund, Neenah

Established by a generous donor to help St. Margaret Mary Parish with their 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 (formerly St. Mary Parish).

St. Mary Parish Legacy League Endowment, Menasha

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

St. Mary Parish Fund, Peshtigo

Provides for the greatest and/or special needs of St. Mary Parish, Peshtigo.

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.

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 educational needs such as capital improvements, curriculum improvement and tuition assistance.



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.



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.

Salvatorian Mission Warehouse Fund, New Holstein
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.

Seminarists 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!

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

Reverend Monsignor Carl E. Steiner Fund for Priests
Assists deserving priests with their requests for sabbaticals and mini-sabbaticals.

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

Peter T. Weiler Family Fund
Funds scholarships to educate needy and deserving seminarians.



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
Funds greatest needs of Camp Tekawitha, including scholarships, year-round building needs or summer programs.

Catholic Charities of the Diocese of Green Bay Endowment

This endowment assists Catholic Charities in reaching out to tens of thousands of people through more than 20 excellent programs like mental health counseling, child welfare services, family strengthening programs and budget counseling to name a few.

Jeanette K. Clark Fund for Children Services

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

Commission of Conscience Fund, Old St. Joe's, DePere

The purpose of the fund is to 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.

Helen Danoski Campaign for Human Development

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

Stephen H. Eckes Fund for Catholic Charity

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

Grellinger Hall Fund, Green Bay

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



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.

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.

Regina & Dominic Olejniczak Endowment

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

Paul's Pantry, Green Bay

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. Established through a charitable gift. Additional gifts are most welcome!

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

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. Additional gifts are most welcome!

Wisconsin Right to Life Education Fund, Veritas Society

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.



2008-2009
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Condensed Statement of Financial Position

	June 30, 2009	June 30, 2008
<i>Assets</i>		
Cash and Investments	\$41,699,355	\$44,319,370
Accounts Receivable	22,853	3,720
Gifts receivable	11,129,683	15,976,152
Other	288,054	327,033
	\$53,139,945	\$60,626,275
<i>Liabilities</i>		
Accrued expenses	\$140,272	\$78,858
Custodial Funds	7,663,379	8,711,077
Pledges Payable	112,118	126,039
Line of Credit	-	-
	7,915,769	8,915,974
Net assets	45,224,176	51,710,301
Total liabilities and net assets	\$53,139,945	\$60,626,275

Condensed Statement of Activities

Year Ended June 30, 2009

Revenues, Investment Gains and Other Support

	June 30, 2009	June 30, 2008
Contributions	\$7,752,627	\$20,531,875
Management fees	158,151	174,369
Total return on investments *	(3,958,919)	(1,501,788)
	3,951,859	19,204,456
<i>Expenses</i>		
Grants **	9,335,481	9,189,580
Management and general	162,983	164,533
Fundraising	939,520	1,980,217
	10,437,984	11,334,330
Change in Net Assets	(\$6,486,125)	\$7,870,126

* Excludes ROI on \$7,663,379 of custodial funds. A fund with a mix of 65% stocks and 35% bonds resulted in a total investment return of -15.96%.

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

A complete audit is available upon request.

Distributions 2008-2009

Unrestricted

Distribution

Free Enterprise Award Dinner	\$995.00
International Catholic Stewardship Conference	\$14,000.00
Sisters of Saint Francis of the Holy Cross, Bay Settlement	\$25,000.00
St. Joseph Real Estate Services	\$19,000.00
Unrestricted Total	\$58,995.00

Education

All Saints Catholic School, Antigo	\$10,000.00
Anna Leitemann Scholarship Award, Appleton Catholic Education System	\$265.00
Appleton Catholic Education System	\$3,152.00
Diocesan Department of Education Tuition Assistance	\$1,696.00
Divine Savior Catholic School System, Kiel & New Holstein	\$9,598.00
Holy Family Parish Education, Brillion	\$8,832.00
Holy Spirit School, Appleton	\$15,500.00
Kaukauna Catholic School System	\$39,831.00
Lumen Christi for Parishes & Schools	\$534,756.00
Notre Dame de la Baie Academy	\$6,611.00
Sacred Heart Catholic Elementary School, Sherwood	\$708.00
St. Anthony Sacred Heart School, Tuition Assistance, Shawano	\$1,721.00
St. Anthony Catholic School, Oconto Falls	\$2,905.00
St. Bernard Parish Education Scholarships, Green Bay	\$6,250.00
St. John Bosco Catholic School, Sturgeon Bay	\$2,224.00
St. John Sacred Heart School	\$2,246.00
St. John Nepomucene School, Tuition Assistance, Little Chute	\$40,208.00
St. Joseph Holy Family Parish, Phlox	\$6,000.00
St. Margaret Mary Catholic Elementary School, Neenah	\$708.00
St. Mary Parish Education, Hilbert	\$3,987.00
St. Mary Parish Education, Peshtigo	\$5,857.00
St. Mary Parish, Tuition Assistance, Oshkosh	\$3,699.00
St. Paul Parish Education, Wrightstown	\$1,263.00
St. Thomas More Catholic School, Green Bay	\$2,529.00
Unified Catholic Schools of Oshkosh, Lourdes Scholarships	\$3,402.00
Unified Catholic Schools of Oshkosh, Scholarships	\$46,687.00
Xavier Catholic High School Scholarship, Appleton	\$3,152.00
Xavier Catholic High School Tuition Assistance, Appleton	\$9,193.00
Education Total	\$772,980.00

Ministry

Bishop Wycislo Center, St. Francis Xavier Cathedral, Green Bay	\$2,568.00
Bishop's Appeal Campaign 2009	\$873.00
Casa Hogar Del Nino, Cabo San Lucas	\$500.00
Catholic Foundation Operating Fund, Green Bay	\$2,966.00
Discalced Carmelite Nuns, Denmark	\$5,251.00
Dominican Republic Mission	\$2,388.00

Distributions ... cont'd

Holy Name Retreat House	\$712,050.00
Holy Spirit Parish, Darboy	\$6,014.00
Lay Ministry Formation, Diocese of Green Bay	\$3,733.00
Leo Benevolent Society	\$120.00
Missionary Oblates, Our Lady of the Snows, Belleville, IL	\$500.00
Mt. Tabor Center, Menasha, in Memory of Sister Mary Jo Kirt	\$1,427.00
Mt. Tabor Center, Menasha	\$6,257.00
Sacred Heart Seminary	\$42,488.00
Salvatorian Mission Warehouse, New Holstein	\$7,760.00
Sisters of St. Francis of the Holy Cross, Bay Settlement	\$1,273.00
Sisters of St. Joseph of Carondalet, St. Louis, MO	\$500.00
Ss. Peter & Paul Parish, Hortonville	\$1,225.00
St. Anthony Parish, Oconto Falls	\$2,542.00
St. Francis & St. Mary Parish, Brussels	\$2,110.00
St. Joan of Arc Parish, Goodman	\$1,399.00
St. John Nepomucene Parish, Little Chute	\$14,704.00
St. Louis Parish, Dyckesville	\$3,412.00
St. Margaret Mary Parish, Neenah	\$3,104.00
St. Mary of the Angels Parish, Green Bay	\$291.00
St. Mary Parish, Peshtigo	\$23,440.00
St. Nicholas Parish, Freedom	\$11,682.00
St. Norbert College Parish, De Pere	\$6,466.00
St. Paul Parish, Facilities, Wrightstown	\$31,000.00
St. Thomas the Apostle Parish, Humboldt	\$2,221.00
St. Vincent De Paul, Green Bay	\$600.00
Vicar for Ministry, Priests Sabbaticals, Diocese of Green Bay	\$1,496.00
Ministry Total	\$902,360.00

Services

Bishop's Appeal Campaign 2009	\$8,689.00
Camp Tekawitha, Shawano	\$2,973.00
Catholic Charities Adoption Services, Green Bay	\$2,093.00
Catholic Charities Child Welfare, Green Bay	\$3,727.00
Catholic Charities Mental Health Program, Green Bay	\$10,000.00
Gifts in Honor of the Installation of Bishop David Ricken	\$35,000.00
Grellinger Hall, Diocesan Priests Retirement Living	\$12,460.00
JOSHUA – Program Advertisement	\$275.00
Paul's Pantry, Green Bay	\$9,705.00
Respect Life Programs, Diocese of Green Bay	\$15,643.00
St. Agnes Parish, St. Vincent DePaul Society, Green Bay	\$1,507.00
St. Joseph Parish, Wautoma	\$500.00
St. Patrick Parish Food Program, Green Bay	\$8,491.00
St. Philip the Apostle Love Life Program, Green Bay	\$500.00
Wisconsin Interfaith Needs Response, Inc (WINR)	\$500.00
Wisconsin Right to Life/Veritas Society	\$7,648.00
Services Total	\$119,711.00



Catholic Foundation

for the Diocese of Green Bay

Distributions ... cont'd

Donor Advised

A & A Alexandrina Center, Green Bay	\$1,200.00
All God's Children Education Fund	\$10,000.00
Bay Lakes Council, Boy Scouts, Appleton	\$500.00
Bishop's Appeal Campaign 2009	\$2,500.00
Camp Tekawitha, Camperships	\$29,006.00
Catholic Charities of the Diocese of Green Bay	\$1,000.00
Catholic Foundation Operating Fund, Green Bay	\$1,000.00
Catholic Relief Services	\$16,000.00
Cure JM Foundation, Illinois	\$150.00
Discalced Carmelite Friars African Mission	\$5,000.00
Discalced Carmelite Nuns, Denmark	\$1,000.00
Dominican Republic Mission	\$1,000.00
Food for the Poor	\$3,500.00
Golden House/Family Violence Center, Green Bay	\$200.00
Hurricane Ike Relief	\$2,500.00
Mother Teresa's Missionaries of Charity	\$5,000.00
NEW Community Shelter, Green Bay	\$300.00
Notre Dame de la Baie Academy	\$5,000.00
Pastoral Leadership Formation Program	\$7,064.00
Pastoral Theology Ave Maria University	\$15,000.00
Parish Vitality Program, Catholic Diocese of Green Bay	\$259,333.00
Paul's Pantry, Green Bay	\$1,578.00
Pope John Paul II Cultural Center, Washington DC	\$1,000.00
Relevant Radio, Green Bay	\$35,000.00
Salesian Order S. D. B., South Korea	\$11,150.00
Salvatorian Mission Warehouse, New Holstein	\$6,000.00
Seminarian Collection	\$1,000.00
Sisters of St. Dominic, Racine	\$2,000.00
Sisters of St. Francis, Bay Settlement	\$500.00
Society of Divine Savior, Holy Hill	\$7,000.00
St. Anthony's Parish, Neopit	\$200.00
St. John Nepomucene Parish & School Endowment Fund, Little Chute	\$50,000.00
St. John Nepomucene Parish, Little Chute	\$26,600.00
St. John the Evangelist Homeless Shelter, Green Bay	\$79,000.00
St. John the Evangelist Homeless Shelter Capital Campaign, Green Bay	\$200.00
St. Joseph's Food Program, Menasha	\$10,000.00
St. Norbert College, De Pere	\$5,500.00
St. Patrick Parish Food Program, Green Bay	\$200.00
St. Paul's University Catholic Center, Madison	\$2,500.00
Stephen H. Eckes Fund for Catholic Charity	\$10,000.00
Vincentian Congregation	\$300.00
Xavier High School Scholarship Endowment, Appleton	\$10,000.00
Donor Advised Total	\$625,981.00
Total Distribution 2008-2009	\$2,480,027.00

2008-2009

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