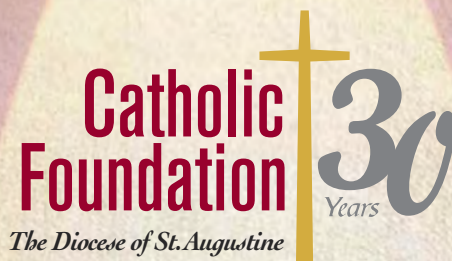




BUILDING
YOUR
Faith
LEGACIES
SINCE 1987



ANNUAL REPORT 2017-2018



Dear Diocesan Faithful,

Thank you for your faithful discipleship in following our Lord. Your stewardship of His blessings allows his Grace to overflow from our hearts into our communities.

This year marks the 30th Anniversary of our Catholic Foundation. We celebrated its founding by our beloved Bishop Snyder and other visionary leaders at a wonderful special event this past March. It was a marvelous gathering of many faithful stewards who've contributed so much to the Diocese of St. Augustine over the years. To all of you who have participated in its work and supported the permanent endowments it stewards – thank you!

As we prepare to celebrate the 150th Anniversary of the Diocese of St. Augustine in 2020, we reflect on the faithful generosity of so many who came before us, inspiring us to answer His call and lead others to the Gospel. So that we "May All Be One", we must do our part to ensure our legacy is as generous and impactful as prior generations'. I'm reminded of Jesus' parable of the mustard seed, the smallest and most modest of all seeds; and yet, it can grow into a tree that shelters and sustains generously. That is the work of the Catholic Foundation – to help each of us discern how best to plant the seeds of an enduring faith legacy that will grow endlessly.

Jesus gave His life for the unceasing benefit of all humanity. His precious gift of the Holy Eucharist is an inspiration which should guide our own faith legacies. A gift through the Catholic Foundation will nourish His Church in perpetuity and support the parishes, ministries and schools we love.

As disciples and good stewards of God's gracious gifts, let us faithfully consider how to respond to our blessings. To which ministries have we dedicated our time, talent and treasure? How can we impact our parish best, especially when we are no longer here? The Catholic Foundation was created to assist in our perpetual support of the Church. Please prayerfully consider a faith legacy gift through the Catholic Foundation.

I pray you find joy in planning your faith legacies. "May the eyes of [your] hearts be enlightened, that you may know what is the hope that belongs to his call, what are the riches of glory in his inheritance among the holy ones." May the "eyes of our hearts" truly discern how to answer His call. [Letter of St. Paul to the Ephesians I.18]

Sincerely yours,
+ ✓ . . . Estévez

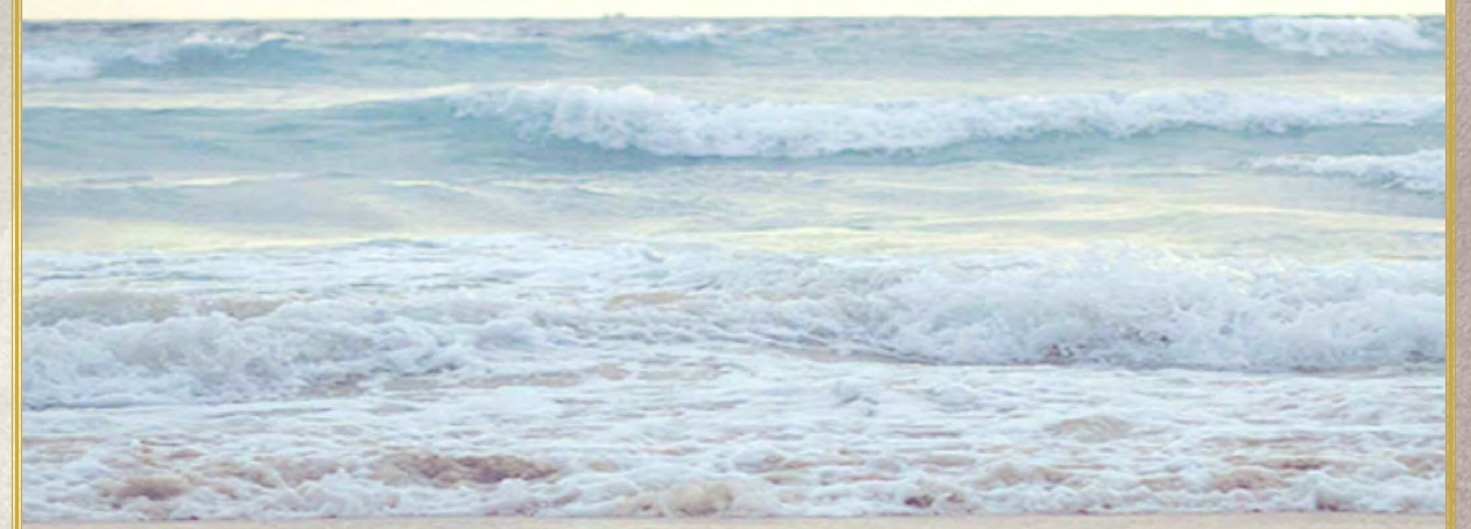
Most Rev. Felipe J. Estévez, S.T.D.
Bishop of St. Augustine

~ WE'RE PROUD TO SUPPORT ~
the work of the Catholic Foundation,
providing enduring resources for our
Church in North Florida for over 30 years!

Anderson Financial Partners has been serving the investment consulting needs of non-profit organizations, high net-worth families and 401k plans for over 15 years. We are an SEC-registered investment advisory firm that oversees nearly \$2 billion in conservatively invested publicly traded investment assets, from our office in Ponte Vedra, Florida.

John K. Anderson, Jr.

Timothy J. Anderson



212 PONTE VEDRA PARK DRIVE, SUITE 200
PONTE VEDRA, FLORIDA 32082

904-280-8995 | www.andersonfinancialpartners.com

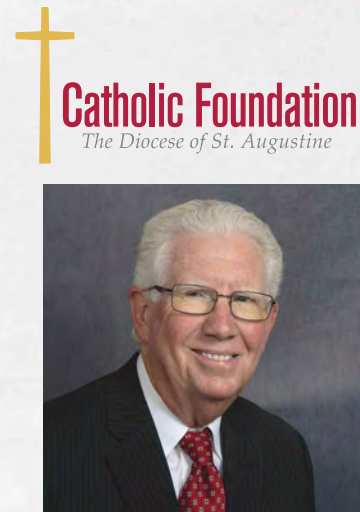
LETTER FROM BOARD CHAIR

January 15, 2019

Dear Friends and Supporters of the Catholic Foundation,
Another successful year!!

Thanks to increasing awareness of what the Catholic Foundation means to the future of Catholic organizations in the Diocese of St. Augustine, 2018 can be judged an outstanding success! Here are just a few achievements I'm happy to share:

- Total assets grew to \$34,743,476 – an increase of over \$2 million even with \$1,297,339 in distributions returned to diocesan parishes, schools and ministries for their use as needed.
- Twenty-five individuals or couples became members of our Legacy Society, the Order of Augustin Verot (see pages 9-10), making a combined commitment from their estate plans for legacy gifts of over \$7 million
- \$89,800 in grants to fifteen Diocesan organizations for special projects within Bishop Felipe J. Estevez' priority categories -
 - » Evangelization
 - » Rural Education
 - » Parish Life



Thanks to the exceptional work of our Board of Directors, the Foundation's permanent endowment funds continued to grow at a substantial rate, while prudently invested in keeping with Catholic values and teaching. At the same time, another clean audit of Foundation finances was received by an independent auditing firm. This Board continues to promote our work successfully and garner increased support from our Catholic community.

With the advice and approval of their Pastors and our Bishop, we're honored to have four new members join the Board in the coming year:

- Michael Maguire – Assumption Parish, Jacksonville
- William McCamy – St. Catherine of Sienna Parish, Orange Park
- Philip Moses – Epiphany Parish, Lake City
- Sidney Simmons – St. Paul Parish, Riverside, Jacksonville

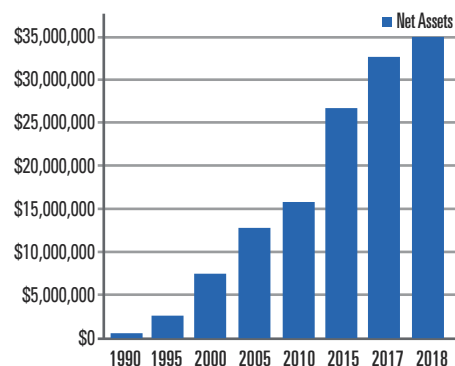
A special thank you to Planned Giving Officer Cliff Evans and our staff. They have energized a focus for working with individuals and their estate planning. This has greatly reduced the angst many endure when outlining charitable desires in their estate plans, as well as helping them give more strategically.

We enter the new year with experienced leadership in Chair John McLaughlin (Our Lady Star of the Sea), who joined the Board in 2016. John has served as Board Vice Chair for two years, as well as Chairing the Development Committee. His extensive background in financial advising and board leadership has proven invaluable.

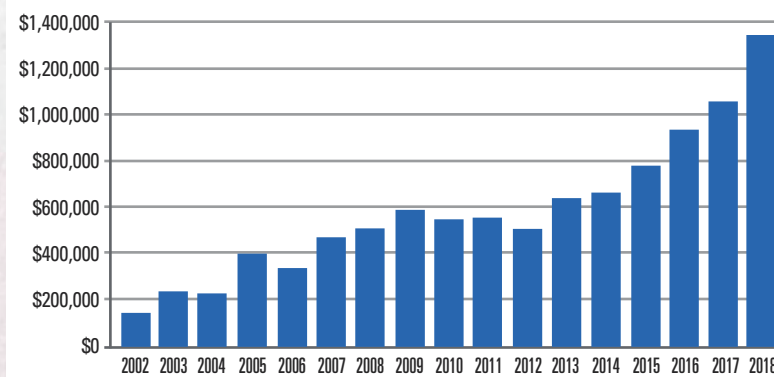
Blessings on all who have joined in this noble venture!

Michael J. McNamara
(St. Paul Parish, Jacksonville Beach) Chair, 2018

THE CATHOLIC FOUNDATION GROWTH OF NET ASSETS SINCE INCEPTION



ENDOWMENT FUND ENDOWMENT FUND DISTRIBUTIONS



Board of Directors 2017-2018

Most Rev. Felipe J. Estévez, President and Bishop,
Diocese of St. Augustine

Mr. Michael McNamara, Chair (St. Paul Beach)

Mr. John McLaughlin, Vice-Chair (Our Lady Star of the Sea)

Rev. Michael Houle, Treasurer/Episcopal Vicar of
Development and Finance

Ms. Martha Barrett, Secretary (Assumption)

Mr. Dick Mulvey, Immediate Past Chair
(Our Lady Star of the Sea)

Msgr. Keith Brennan, Vicar General

Deacon David Williams, Chancellor (Mary Queen of Heaven)

Mr. Dennis Axman (St. Catherine)

Mrs. Lynn Belo (Queen of Peace)

Dr. Rafael Gomez (Blessed Trinity)

Msgr. Vincent Haut (Basilica of the Immaculate Conception)

Mrs. Mary Pat Kulik (Our Lady Star of the Sea)

Mr. Michael Marconi (Holy Faith)

Mr. William McMenemy (St. Paul-Beach)

Mr. Ricardo Morales (San Jose)

Mr. Kenneth Thompson (Assumption)

Past Chairs

Mr. Hobart Joost*	1987-1991
Mr. George Helow*	1991-1994
Mr. Warren Powers	1994-1995
Mr. Robert Shircliff	1995-1997
Mr. John Crawford	1997-1999
Mr. Ernest Bono, Sr.	1999-2001
Mrs. Kay Zambetti	2001-2003
Msgr. Vincent Haut	2003-2005
Mr. Jeffrey Quaritius*	2005-2006
Mr. Gerald Weedon	2006-2007
Dcn. George Good	2007-2008
Mr. John Sullivan*	2008-2009
Mr. Clifford Lewis	2009-2010
Mrs. Mary Toomey	2010-2011
Mr. Michael Altes*	2011-2012
Mr. James Marx	2012-2014
Mr. Ricardo Morales	2014-2015
Mrs. Gwen Yates	2015-2016
Mr. Richard Mulvey	2016-2017

(*Deceased)

CATHOLIC FOUNDATION

11625 Old St. Augustine Road
Jacksonville, FL 32258 | 904-262-3200
www.dosafl.com/catholic-foundation/

A copy of the independent Auditor's Report for the Catholic Foundation for the fiscal year ending June 30, 2017 is available at the Fiscal Office of the Diocese of St. Augustine, 11625 Old St. Augustine Road, Jacksonville, FL 32258.

IRS Form 990 Tax Returns are also available by going to www.guidestar.org.



Past Chair Dick Mulvey passes gavel to incoming Chair Mike McNamara at 2018 Annual meeting.

Ex-Officio & Staff

Mr. Stephen Bell, CFO

Rev. Michael Houle, Executive Director

Mr. Tim Cebulko, Financial Advisor

Mr. Cliff Evans, OFS, MA, Planned Giving Officer

Mrs. Julie Snow,
Development Assistant

Mrs. Julia Colbert,
Planned Giving Assistant

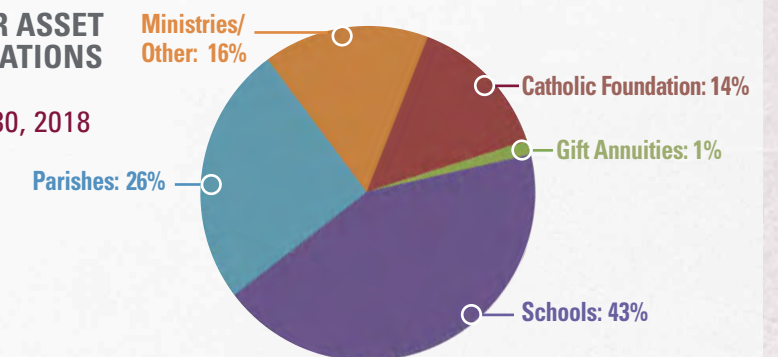
FINANCIAL ACTIVITY 2017-2018

Net Assets as of June 30, 2017	\$32,707,590
Contributions	\$208,044
Investment Income	\$1,041,020
Market Gains	\$2,191,016
Other Revenue	\$253,402
Total Public Support & Revenue	\$3,693,482
Grants, Annuity, & Beneficiary Payments	\$1,422,277
Operating Costs	\$235,319
Total Disbursements & Costs	\$1,657,596
Net Increase	\$2,035,886
Net Assets as of June 30, 2018	\$34,743,476

Net Assets by Fund Category as of June 30, 2018

Catholic Foundation	4,888,647	14%
Gift Annuities	\$465,885	1%
Schools	\$14,959,387	43%
Parishes	\$8,812,466	26%
Ministries/Other	\$5,617,091	16%
Total Net Assets	\$34,743,476	100%

DONOR ASSET ALLOCATIONS AS OF JUNE 30, 2018



PLANNED GIVING ADVISORY COMMITTEE

The Catholic Foundation hosted over fifty estate planning professionals and financial advisors at a forum February 20th, 2018. This was the first major initiative of the Foundation's newly formed Planned Giving Advisory Committee. Made up of Catholic professionals, this group provides invaluable expertise and support to the Board of Directors and staff.

The purpose of the committee is also to reach out to professional colleagues who advise benefactors in their estate and legacy planning. The Foundation seeks to be better known as a valuable partner to benefactors wishing to make a lasting impact through planned gifts to support diocesan programs – many of which provide services far beyond our Catholic community.

One of the organizations providing such services – the Jacksonville Bureau of Catholic Charities, was the featured Foundation partner agency at the forum. Many non-Catholic professionals attended and were surprised to learn of the varied and far-reaching programs Catholic Charities provides throughout North Florida and how the Foundation supports this through the permanent endowments it stewards.



*Estate Planning Advisors Forum Featured Speaker
Bob Shireliff, Jacksonville Business Community Icon
and Foundation Founding Board Member*

PLANNED GIVING ADVISORY COMMITTEE MEMBERS 2017 – 2018

- John Anderson – Anderson Financial Partners
- David Baker – Merrill Lynch
- Jeffrey Bernardo – Augustine Asset Management
- Richard Brock – BDO
- Gregory Estes – Augustine Asset Management
- James Heinz – Heinz & Jolles
- James Knutzen – Formerly of Knutzen & Associates
- William McMenemy – Donahoo & McMenemy, P.A.
- Christopher Thompson – Wells Fargo Advisors
- Ken Thompson – Wells Fargo Bank
- Kim Wilmoth – Wilmoth & Associates, CPAs



Barbara Scholtz received 2018 Bishop John J. Snyder Legacy Leadership Award in memoriam for her late husband Dutch. She selected San Jose Catholic School to receive the \$1,000 award placed in their endowment fund at the Catholic Foundation.

PARISH, MISSION, SCHOOL & MINISTRY ENDOWMENT FUNDS Fund Values as of June 30, 2018

ENDOWMENT FUND VALUES \$1,000,000+

Aycocke Trust
Cathedral Basilica Liturgical
Catholic Charities Central Office
Christ the King Church, Jacksonville
Christian Formation
Devlin Orphan Care & Adoption
Guardian Catholic School, Jacksonville
Mullen Nassau County Education
Queen of Peace Catholic Academy, Gainesville
Queen of Peace Church, Gainesville
St. Michael Academy, Fernandina Beach
St. Paul Church, Jacksonville
Vocations

ENDOWMENT FUND VALUES \$100,000 +

Bishop Kenny High School, Jacksonville
Bishop Snyder High School Vallencourt Scholarship
Cathedral Parish School, St. Augustine
Catholic Charities, Jacksonville
Christ the King School, Jacksonville
DSA Fund
Genevieve Joos Trust
L.E. Joos & Genevieve C. Joos Trust
Office of Human Life and Dignity
Priests' Long Term Care
Sacred Heart Church, Jacksonville
Sacred Heart School, Jacksonville
San Jose School, Jacksonville
San Lorenzo Cemeteries
St. Ambrose Church, Elkton
St. Anastasia Church, St. Augustine
St. Catherine of Siena Church, Orange Park
St. Elizabeth Ann Seton Church, Palm Coast
St. Francis Catholic Academy, Gainesville
St. Joseph Academy, St. Augustine
St. Matthew Church, Jacksonville
St. Michael Academy-Don Fuller Scholarship
St. Michael Cemetery
St. Patrick Interparish School, Gainesville
St. Patrick School, Jacksonville
St. Paul School, Jacksonville
St. Paul School, Jacksonville-Brizzard Scholarship
St. Paul School, Jacksonville Beach
St. Vincent de Paul Society, St. Augustine Council

ENDOWMENT FUND VALUES \$10,000 +

Annunciation Interparish School, Middleburg
Assumption Church, Jacksonville
Assumption School, Jacksonville
Basilica of the Immaculate Conception, Jacksonville
Bishop Snyder High School Nu-Trend Scholarship
Bishop Snyder High School, Jacksonville
Camp St. John Chapel
Catholic Charities, Gainesville
Catholic Charities, St. Augustine
Catholic Education General
Catholic Education Scholarship
Christ the King St. Vincent de Paul Society
Christ the King Youth
Corpus Christi Church, St. Augustine
Disabilities Ministry
Epiphany School, Lake City
Family Life

ENDOWMENT FUND VALUES \$10,000 + (CONTINUED)

Holy Faith Church, Gainesville
Holy Family Church, Jacksonville
Holy Family School, Jacksonville
Holy Rosary Church, Jacksonville
Holy Spirit School, Jacksonville
Morning Star School, Jacksonville
Our Lady Star of the Sea Church, Ponte Vedra Beach
Resurrection Church, Jacksonville
Resurrection School, Jacksonville
Retired Sisters
San Juan del Rio Bell Tower
San Juan del Rio Perpetual Care
San Lorenzo-Rose McNally Fund
St. Ambrose Cemetery
St. Francis Xavier Church, Live Oak
St. Patrick Church, Jacksonville
St. Vincent de Paul Society, Jacksonville Council

ENDOWMENT FUND VALUES UNDER \$10,000

Blessed Trinity Church, Jacksonville
Blessed Trinity School, Jacksonville
Cathedral Basilica, St. Augustine
Crucifixion Church, Jacksonville
Epiphany Church, Lake City
Holy Cross Mission, Cross City
Holy Family Church, Williston
Holy Spirit Church, Jacksonville
Mary Queen of Heaven Church, Jacksonville
Most Holy Redeemer Church, Jacksonville
Office of Human Resources
Our Lady of Consolation Church, Callahan
Our Lady of Good Counsel Mission, St. Augustine

Palmer Catholic Academy, Ponte Vedra Beach
Prince of Peace Church, Jacksonville
Sacred Heart Church, Fleming Island
San Jose Church, Jacksonville
San Juan del Rio Church, St. Johns
San Juan Mission, Branford
San Sebastian Church, St. Augustine
Santa Maria del Mar Church, Flagler Beach
Shrine of Our Lady of La Leche
St. Anthony the Abbott Mission, Inglis
St. Augustine Catholic Gators
St. Augustine Church, Gainesville
St. Augustine Sandow Retreat Scholarship
St. Edward Church, Starke
St. Elizabeth Ann Seton School, Palm Coast
St. Francis of Assisi Mission, Yulee
St. John the Evangelist Church, Chiefland
St. John the Evangelist Church, Interlachen
St. Joseph Church, Jacksonville
St. Joseph School, Jacksonville
St. Luke Church, Middleburg
St. Madeleine Church, High Springs
St. Madeleine Memorial Gardens Perpetual Care
St. Mary Church, Bunnell
St. Mary Mother of Mercy Church, Macclenny
St. Matthew School, Jacksonville
St. Michael Church, Fernandina Beach
St. Monica Church, Palatka
St. Patrick Church, Gainesville
St. Paul Church, Jacksonville Beach
St. Peter Mission, Jacksonville
St. Philip Neri Mission, Hawthorne
St. Pius Church, Jacksonville
St. William Church, Keystone Heights
Women's Formation Scholarship

WELLS
FARGO

THE PRIVATE BANK



Working together for a bright future

Your time is valuable; how you spend it reflects who you are and the kind of world you want to create. Thank you for supporting the Catholic Foundation, Diocese of St. Augustine. We're proud to stand with you. Together, we're helping make the future bright for those who need it most. We can help you plan for your vision of your future—and the future of our community.

To start a new kind of conversation, contact your local Wells Fargo Private Bank office:

Kenneth R. Thompson
Senior Fiduciary Specialist
904-351-7503
kenneth.r.thompson@wellsfargo.com

June L. Lundy
Investment Strategist
904-351-7538
june.lundy@wellsfargo.com

Wealth Planning ■ Investments ■ Private Banking ■ Trust Services ■ Insurance | wellsfargoprivatebank.com

Investment and Insurance Products: • NOT FDIC Insured • NO Bank Guarantee • MAY Lose Value



Wells Fargo Private Bank provides products and services through Wells Fargo Bank, N.A., the banking affiliate of Wells Fargo & Company, and its various affiliates and subsidiaries. Brokerage products and services are offered through Wells Fargo Advisors. Wells Fargo Advisors is a trade name used by Wells Fargo Clearing Services, LLC, Member SIPC, a registered broker/dealer and nonbank affiliate of Wells Fargo & Company. Trust services available through banking and trust affiliates in addition to non-affiliated companies of Wells Fargo & Company. Insurance products are available through insurance subsidiaries of Wells Fargo & Company and underwritten by non-affiliated Insurance Companies. Not available in all states.

© 2018 Wells Fargo Bank, N.A. Member FDIC. IHA-B08394 NMLS ID 399801

THE CATHOLIC FOUNDATION IS HERE TO HELP YOU CREATE THE MOST IMPACTFUL AND JOYFUL LEGACY GIFT YOU CAN!

JOHN MCLAUGHLIN ESTATE-PLAN GIFT SAVES TAXES FOR HIS LOVED ONES

Wealth management expert John McLaughlin is making his estate-plan gift to the Catholic Foundation of the Diocese of St. Augustine from his IRA for one simple reason—it saves taxes for his loved ones.

“If my wife or kids inherited my IRA, that money would be taxed as income and they would not get the full benefit,” explained McLaughlin, a senior vice president for Morgan Stanley and also vice chair of the Catholic Foundation board. “But if I give that money through the Catholic Foundation, the entire value of the gift goes to the endowment of my choice (the Our Lady Star of the Sea Parish).”

John is also giving a portion of a life insurance policy to his parish. He chose that asset for its simplicity. “I don’t need an attorney, and I don’t need to create a will or revocable living trust. I simply contact my



financial institution and request a change-of-beneficiary form,” John said.

John joined the foundation board after serving on the board of Catholic Charities Jacksonville.

He is in his second year as vice chair and is expected to be board chair next year. He has attended the Our Lady Star of the Sea Parish since moving to Florida from South Carolina, where he grew up and earned a bachelor’s degree in finance from the University of South Carolina. He and his wife Ana have been married for 21 years and have three children.

In designing the gift, John met several times with Planned Giving Officer Cliff Evans—whom he praised as a valuable resource. “He is a great first contact, and it is not a high-pressure thing,” John says. “He helped me to clarify what I was trying to achieve, and I don’t think I would have gotten all the way there without Cliff.”

To read about other creative faith legacy gift plans or how you can plan your own visit [dosafl.giftplans.org](https://www.dosafl.giftplans.org)

We need every legacy gift to count to its fullest while ensuring our faith community benefits to the fullest. Here are two families whom we’ve helped create wonderful faith legacy gift plans. Let us know if we can help you as well.

TERRY AND ERIN MCGEE SET UP SCHOLARSHIP IN THANKS FOR CHILDREN’S EDUCATION

Terence “Terry” McGee, MD, is an ophthalmologist in the U.S. Navy who’s grateful for the scholarship support he received to attend Catholic schools while growing up in New York. He is also thankful for the education his children Matthew and Molly received at Bishop John J. Snyder Catholic High School in Jacksonville and the positive impact it had on their lives.

In gratitude, he and his wife Erin have made a ten-year pledge to the Catholic Foundation to endow the McGee Family Scholarship Fund, which will provide scholarship assistance to Snyder students in perpetuity. An annual year-end gift from a mutual fund is planned for this that also provides tax deductibility as a gift of appreciated securities.

“We loved the school,” Terry says of Snyder. “We thought it was a great foundational experience for our kids that has helped them focus on the important things in life.”

The McGees have already established a similar scholarship at the high school Terry attended in Rochester, New York, with that fund named after his parents. “I was the eighth of nine children, and we didn’t have a lot of money,” Terry recalls. “I got to go to Catholic schools because of the beneficence of other people.”

Erin also attended Catholic schools, growing up in Augusta, Georgia, and her Catholic education was equally formative. “My Catholic education reinforced the idea that daily prayer



is quite normal for anyone. We feel very blessed to have some small role in helping others deepen their relationship with God.” Terry and Erin are active parishioners at St. Paul’s-Riverside, where Terry is a lector and has coached the basketball and softball teams for many years. Erin has served for many years as a board member

and fundraising chair of the Parents’ Association for St. Paul’s Catholic School-Riverside.

Terry expressed concern that more scholarships are needed in order to continue the positive influence of Catholic education.

“A whole lot of people would like to go to Catholic schools because of the quality of the education, but they have trouble affording it,” he says. “We are worried that future generations will not have the opportunity that I had. What we are giving is not a huge amount, but over a number of years it will generate money in perpetuity after we are gone to reduce the cost of Catholic education at Snyder. Just about everybody is capable of making a gift like this.”

ORDER OF AUGUSTIN VEROT LEGACY GIVING 2017-2018

Augustin Verot, first bishop of the Diocese of St. Augustine, had an abiding commitment to the growth of Catholicism through education, social justice and vocations. The Order of Augustin Verot recognizes the importance of planned gifts - bequests, charitable gift annuities, charitable remainder trusts, retirement plans, or other instruments—supporting the work of our Church in North Florida for generations to come...

Membership in the Order of Augustine Verot is reserved to those who notify the Diocese and/or Catholic Foundation they have made estate or other gift plans to benefit the Diocese or a parish, school or ministry.



Dr. Maria Acosta-Rua
Ms. Judith Adkins
Mark and Rita Allen
Mr. and Mrs. John Anderson
Elmer Aponte
Dennis M. and Mary H. Axman
Mr. and Mrs. Charles Baer
Ms. Kathleen Bagg
Donald Ballish
Mr. and Mrs. Edward Barbarito
Ms. Martha Barrett
Mr. Raymond Basso
Mr. George Baumgartner
Mr. Frank Benischeck
Mrs. Lisa Benton
MG Paul and Janet Bergson
Mr. Leo Blatz
Rev. James Boddie
Mr. and Mrs. Ernest Bono
Mr. and Mrs. Kevin Brown
Mr. and Mrs. Joseph Brozovich
Mr. and Mrs. Brian Cabrey
Stanton L. Cadow, CFRE, ECRF
Mrs. Gertrude Cameron
Juanita R. Campbell
Mr. and Mrs. Michael Cascone, Jr.
Mr. Victor Chew
Rev. Peter Colasurdo
Mr. Wayne Colvin
Mrs. Everett Comstock
Mr. and Mrs. Tommy Crowder

Mrs. Marlise Cusick
Mr. and Mrs. Eugene Dagg
Concetta DeLisi
Mrs. Betty Demetree
Mr. and Mrs. Louis DePetris
George and Pam Dewey
Mr. Cosmo DiPerna
Dr. and Mrs. Walter Eaton
Mr. and Mrs. James Eckert
Allison Le Elias
Mr. and Mrs. Jerry Ellis
Mr. and Mrs. Rodolfo Engmann
Dick and Diane Erickson
Cliff and Debbie Evans
Mrs. Doris Faustini
Ms. Alice Ferrari
Mrs. Shirley Fewox
Mrs. Judith Franklin
Mrs. Gail Gaines
Ms. Mary Gallagher
Ron and M.J. Ginder
Mrs. Carole Ginzl
Mrs. Joan Giordano
Mr. and Mrs. John Gribbin
Msgr. Vincent Haut
Mr. and Mrs. John Hay
Mr. and Mrs. Kurt Hearth
Mrs. Margaret Helow
Msgr. James Heslin
Mr. and Mrs. Donald Hollingsworth
Mrs. Peter Holt

Dr. Mary Hughes
Ms. Barbara Jackson
Mr. and Mrs. William Joos
Hobart Joost, Jr.
Robert W. and Cynthia Kastner
Paul and Kathy Kerins
Ms. Karen King
James and Susan Knutzen
Msgr. Eugene C. Kohls, J.C.D.
Mr. and Mrs. Henry Kuhnert
Janet LaFrance
Ms. Dorothy Legere
Ms. Mary Lesperance
Mrs. Rose-Marie Lewis
Ms. Audrey Loos
John and Katherine T. Lowe
Charitable Remainder Trust
Alfred J. Martin
Mrs. Patty Martinez
James and Joanne Marx
Mrs. John H. McCormack, Jr.
Sister Louise Thayer McEachern
Dr. Terence and Mrs. Erin McGee
John and Ana McLaughlin
Mr. and Mrs. William B. McMenamy
Michael J. and Carol A. McNamara
Mrs. Gloria Mendez
Ms. Gail Middleton
Mrs. Teresa Milam
Mr. and Mrs. Richard Miller
Mr. and Mrs. Ricardo Morales



PLANNING YOUR FUTURE FOR PEACE OF MIND NOW

LEGACY PLANNING LAW GROUP

Estate Planning | Wills, Trusts, & Estates | Second Marriage Planning
Probate | Elder Law | Long-Term Care Asset Protection | Business Planning
Medicaid & VA Planning | Special Needs Planning | Guardianships
Estate & Trust Administration | Powers of Attorney | Pet Planning | Gun Trusts



William A. O'Leary, JD, LLM (Tax)
(904) 880-5554
3430 Kori Road, Suite 4
Jacksonville, FL 32257
Info@LegacyPlanningLawGroup.com
LegacyPlanningLawGroup.com

ORDER OF AUGUSTIN VEROT LEGACY GIVING 2017-2018

Mr. and Mrs. John Morrissey
Michael and Faith Murray
Mr. and Mrs. Ronald Natale
CH (Maj.) James O'Neal
Ms. Mollie O'Neill
Mr. and Mrs. Ramzi Ossi
Mr. V.E. Palmer
Father Fred Parke
Christopher (Kit) Parker
Rev. Lawrence Peck
Mrs. Saralee Peters
Elizabeth H. Phelps
Mr. and Mrs. John Pinson
Mr. and Mrs. Thomas Place
Ms. Denis Plumb
Mr. and Mrs. Warren Powers
Ms. Nancy Powers
Ms. Lucina Presbitero
Mr. and Mrs. Dominick Prodoti
Mrs. Irene Puleo
Michael P. and Teresa A. Radzinski

Mrs. Victoria Reigel
Mr. and Mrs. Ramon Reyes
Mrs. Dianne Rice
Ms. Patricia Robinson
Mr. and Mrs. Tancredi Rucci
Mr. and Mrs. Patrick Russell
Ms. Mary Ryan
Gerald R. Schmidt
Mrs. Barbara Scholtz
Mr. and Mrs. Kenneth Shafer
Mr. and Mrs. Robert T. Shircliff
Mrs. Alicia Sierra-Reyes
Ms. Marjorie Simpson
Ms. Gayle Smith
Most Rev. John J. Snyder
Mr. and Mrs. Philip Sotomayor
Mr. and Mrs. Jerome Swietnicki
Mr. and Mrs. Glynn Thomas
Ms. Patricia Thomas
Ken and Cindy Thompson
William and Patricia Tierney

Mr. and Mrs. Roger Tompkins
Jerry Veierstahler
Mr. and Mrs. Carlos Vides
Mr. and Mrs. Andy Wade
Mr. and Mrs. Louis Walsh
Mr. John Walsh
Mr. and Mrs. Gerald Weedon
Mr. and Mrs. Harold Westover
Mrs. Mari White
Mrs. Rose White
Jerome and Christie Wilamowski
Deacon David & Karen Williams
Family Fund
Mrs. Rosita Williams
Very Rev. Thomas S. Willis
William M. and Judy A. Wolford
Mr. and Mrs. Alton Yates
Katharine K. Zambetti
M. Elaine Zurek and
Timothy T. Wojciechowski, Sr.

SINCERE GRATITUDE TO ALL PAST AND CURRENT MEMBERS OF THE ORDER OF AUGUSTIN VEROT!



We provide 60+ years of hands on experience tailored to client needs at 30% to 50% less than national competing firms. Why pay more?

CAPITAL CAMPAIGNS | PLANNING STUDIES | STEWARDSHIP | MAJOR GIFTS

Stanton L. Cadow, CFRE, ECRF, President

(former Director of Development & Stewardship and Executive Director, Catholic Foundation, Diocese of St. Augustine)

www.cadowdevelopmentconsulting.com | 225-921-9102



**PROUD PARTNER OF THE CATHOLIC FOUNDATION...
CONGRATULATIONS ON 30 YEARS OF SERVICE!**

WILLIAM B. MCMENAMY | BOARD CERTIFIED TAX ATTORNEY
245 RIVERSIDE AVENUE, SUITE 450 | JACKSONVILLE, FL 32202
T: (904) 354-8080 | F: (904) 791-9563

CATHOLIC FOUNDATION GRANTS AWARDED 2017-2018

RECIPIENT ORGANIZATION	PROJECT	GRANT AMOUNT
Grant Priority – Evangelization		
Christian Formation	Certification of Catechists	\$ 3,500
Christian Formation	Spanish RCIA Team Training	\$ 2,000
Our Lady of Good Counsel	Evangelization Mission to Haiti	\$ 4,000
Our Lady of Good Counsel	Parish Renewal and Evangelization	\$ 2,000
Sacred Heart Jacksonville	Formation for Life Teen & Edge	\$ 3,000
Sisters of St. Joseph	Villa Flora Evangelization Program Director	\$ 5,000
Young Adult Ministry	Young Adult Spiritual Formation Programs	\$ 1,000
Young Adult Ministry	Young Adult Ambassador Outreach	\$ 1,500
Youth Ministry	Urban Plunge Program	\$ 6,000
Grant Priority – Rural Education		
Bishop Snyder High School	Baker County Enrollment Initiative	\$ 1,000
Epiphany School	Rural Education	\$10,000
St. Francis Xavier Church	Rural Parish Initiative	\$10,000
St. Monica Church	Riding on Angels Wings	\$10,000
Grant Priority – Parish Life		
Holy Rosary Church	Bathroom Renovation	\$ 8,800
St. Ambrose Church	Our Lady of Lourdes Grotto	\$ 10,000
St. Francis of Assisi	St. Francis Music Ministry	\$ 5,000
St. John the Evangelist Church	Formation & Community Workshops	\$ 3,000
St. Mary Church	St. Anne Food Pantry Freezer	\$ 1,000
St. William Church	Assisted Listening System	\$ 3,000
Total Grants Awarded		\$ 89,800

For further information on Catholic Foundation's Grants Program, visit our website at: www.dosafl.com/catholic-foundation/

The grants given by the Catholic Foundation each year are made possible by donors who gave to the permanent endowment fund of the Foundation and Diocese.

– FIND OUT HOW YOU CAN MAKE A LASTING IMPACT THROUGH THE CATHOLIC FOUNDATION –

- 1. The Purpose of the Catholic Foundation:** As an independent not-for-profit 501c3 corporation, the foundation provides assistance to parishes, schools and ministries by creating perpetually endowed funding. There are more than 120 endowment funds currently under the stewardship of the Foundation. These funds have grown to more than \$25 million in assets. Nearly every parish and school has created a permanent endowment fund to which their parishioners and student families can contribute lasting gifts of support.
- 2. Planned Giving works for you:** Planned giving is essentially a donation that is provided for in one's estate plan. In essence – it is making plans to keep supporting something we care deeply about once we are no longer here. A donation to the Church of this type becomes a "charitable contribution" and may not only be tax-exempt but can lower tax liabilities for one's family.
- 3. Planning for your future:** Estate planning is something everyone needs to do. This is not something reserved for the very wealthy. When we pass away, all of us will have financial and tangible assets. Do you want to decide who receives your possessions and assets or do you want the courts to decide? We all need to make provisions for unanticipated needs. At the same time, consider a legacy gift to your church.
- 4. The Foundation helps you plan a better future:** We've offered regional estate planning seminars since 2016.

To learn more, call Cliff Evans, OFS, MA, Planned Giving Officer: (904) 262-3200, ext. 139 or email cevans@dosafl.com.

GRANT RECIPIENTS HIGHLIGHTS 2017-2018

PARISH AMBASSADOR OUTREACH: YOUNG ADULT MINISTRY, DIOCESE OF ST. AUGUSTINE

Grant Amount: \$1,500

The Young Adult (YA) Ambassador Program has worked to create a welcoming and inclusive environment for young adults at parishes and Diocesan events. The Ambassadors hosted a city-wide "DOSA YA Ministry Fair" which helped over 100 attendees to get plugged into parishes and ministries and find community within which to grow and engage their faith.

The Ambassadors also helped create a website for YA leaders/Ambassadors to instantly find and participate in small YA groups and events at www.catholicjaxya.org. The Ambassadors program has already grown to include 20 members. These Ambassadors actively lead small YA groups and volunteer at events to engage other young adults in their faith and help build the YA community of the Diocese.



PARISH RENEWAL & EVANGELIZATION: OUR LADY OF GOOD COUNSEL PARISH, ST. AUGUSTINE

Grant Amount: \$2,000

Our Lady of Good Counsel Parish has initiated an evangelization renewal program focused on the Sunday Liturgy. Hiring a new Director of Liturgy and Music enabled the parish to place special emphasis on young adults and their children while addressing the greater needs for renewal among all parishioners. This renewal program, which implies what Church documents call the 'dialogic nature' of the mass, is having a dynamic impact on the parish community – enhancing both relationships among parishioners and engaging their deeper dialogue with God in the Eucharistic Assembly.

As Pastor, Fr. Guy Noonan, shared recently – "We've implemented youth and young adults as part of a creative technology team to build slide shows for media. The youth involved in this project are also introducing new music as prelude to our 'regular style Mass'. In addition, our Children's Choir is robustly being developed (25 kids) and leading one Mass per month with engaging music appropriate to that generation. We've also purchased media equipment and screens to facilitate an expansion of repertoire and the display of the same for the congregation. I can only say that I am delighted to date as to the promise of this project which is meant to be on-going and very grateful for the partnership of the Catholic Foundation."



VILLA FLORA EVANGELIZATION: SISTERS OF ST. JOSEPH OF ST. AUGUSTINE

Grant Amount: \$5,000

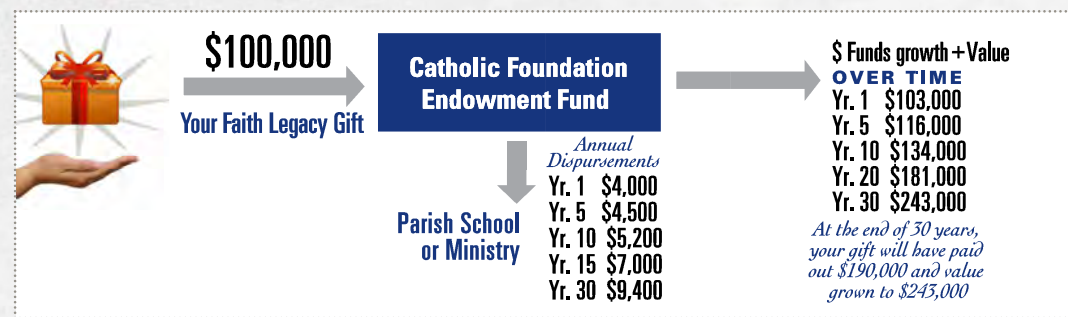
The Sisters of St. Joseph of St. Augustine renovated the historic Villa Flora and Brown Hall to become St. Joseph Renewal Center. Offering daylong and overnight retreats to both Catholic and non-Catholic groups, they are answering the call of Pope Francis for evangelization.

The Renewal Center has ministered to more than 500 people over the past five months through retreats, special programs and presentations. Administration has designed and distributed St. Joseph Renewal Center brochures as well as their monthly digital Newsletter sent via Constant Contact throughout the diocese and beyond. A Martha/Mary Ministry has been created to combine spiritual and physical assistance with meal preparation. Sister Jane Stoecker, SSJ who leads this impactful ministry beautifully expressed the meaning of this program and why the Foundation supported it – "We find great joy and satisfaction in our ministry at the Renewal Center. Seeing Christ in every person who enters here, we serve Christ himself!"



ABOUT THE  **Catholic Foundation**
The Diocese of St. Augustine

- 1. What does the Catholic Foundation do?** The Foundation establishes and manages permanent endowment funds created to provide enduring support for the Catholic Church in North Florida. It also promotes good stewardship so you can plan well for the needs of your family, yourself and your Church. It provides resources for financial and estate planning and helps you discern the very best way to give generously now and for that last gift you give.
- 2. How are Foundation operations funded?** Each endowment fund entity is given the option of taking an annual 4% disbursement from its permanent fund. Funds not restricted to any specific parish, school or ministry are used annually to fund operational expenses at 4%. A ¾% fee is charged to each entity to help with this, as well as funding annual grant giving directed by the Bishop.
- 3. What are the advantages of endowment fund giving?** Funds gifted to an endowment fund are held in perpetuity – the principle cannot be spent and must be invested prudently. This is done by our Board of Directors with oversight from Diocesan Fiscal and Bishop's Offices. Even when the annual disbursement at 4% is taken, the endowments have still grown over time due to sound investment principles and practices. The chart below is helpful in understanding the lasting value and impact of gifts to our permanent endowments.



Meet Cliff Evans
Catholic Foundation
Planned Giving Officer

Thank you for your generous stewardship for the work of our Church in North Florida. I'm ready to help you and your family discover how to create a lasting faith legacy by supporting the Diocese of St. Augustine and its vital work in our parishes, schools and ministries.

Call me at 904-208-6931, cevans@dosaf1.com, or visit our website dosaf1.giftplans.org for more information.

John, Ana and the McLaughlin Family

– PROUDLY SUPPORT –

The Catholic Foundation of the Diocese of St. Augustine through their commitment to leave a Faith Legacy for future generations.

At the heart of Charity is Love.



JOIN US IN SUPPORTING THE MISSION AND WORK OF THE CATHOLIC FOUNDATION

Remember our Church in your will or trust.

The mission of the Catholic Foundation of the Diocese of St. Augustine is to expand the opportunities for Christ's work in the Diocese-its parishes and schools, its ministries and clergy-by encouraging stewardship, philanthropy and the growth of perpetual endowment.

- The Catholic Foundation attracts endowment funds to support Catholic education, youth and adult ministries, vocations and the retirement of priests;
- Encourages and administers individual parish, school and ministry endowments; and provides estate planning and charitable giving information and assistance.

 **AUGUSTINE**
ASSET MANAGEMENT

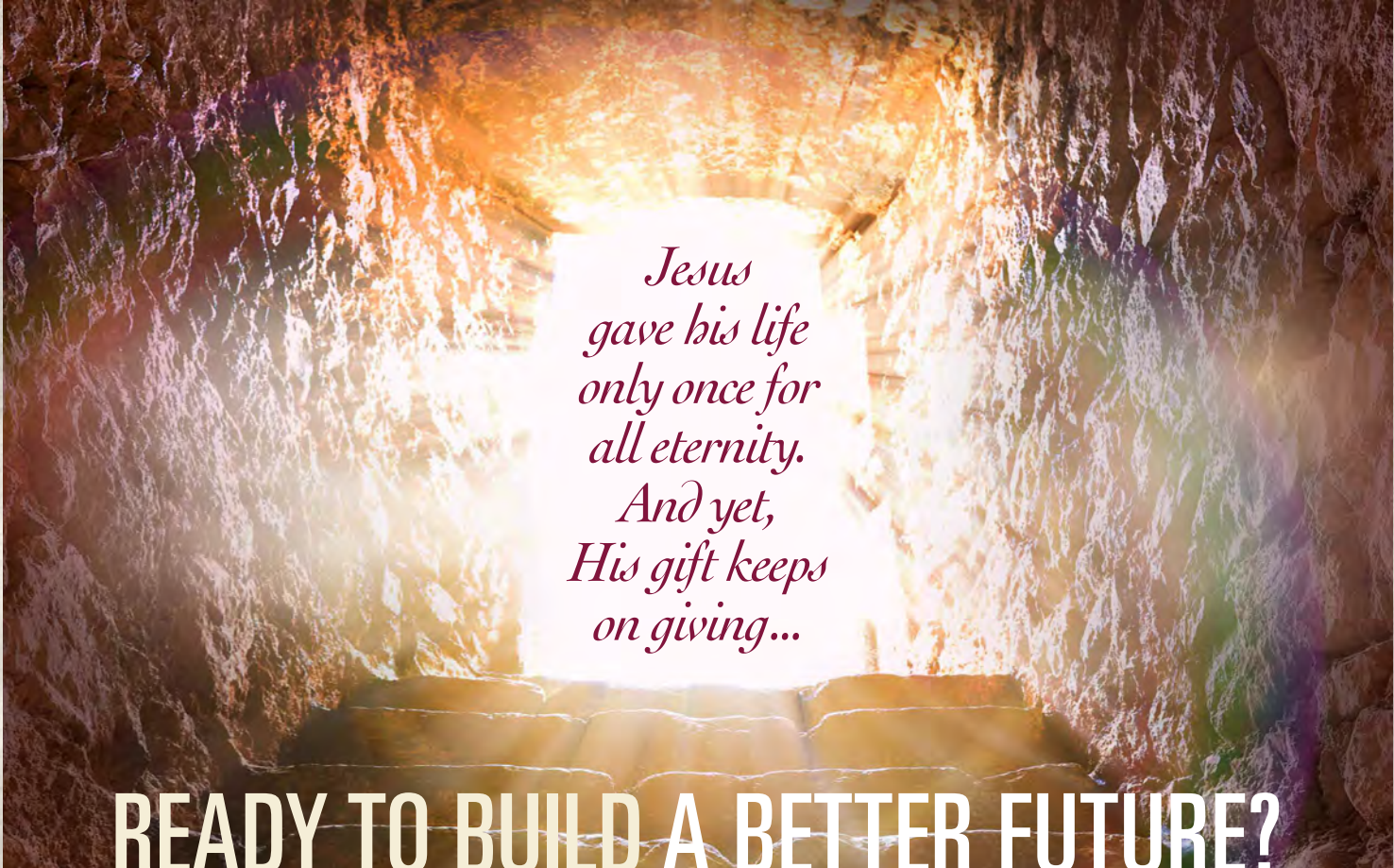
Congratulates the Catholic Foundation on 30 years of service to the Diocese of St. Augustine

Broad Investing Expertise. Dedicated to Clients.

Since 1985, our highly-experienced team has successfully served wealthy families and institutions with a client-centered approach to growing financial assets while managing portfolio risk.



Augustine Asset Management is a proud provider of Catholic values-based investing.
AUGUSTINEASSET.COM | 904.396.6944 | INQUIRIES@AUGUSTINEASSET.COM



*Jesus
gave his life
only once for
all eternity.
And yet,
His gift keeps
on giving...*

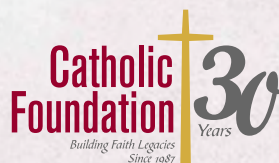
READY TO BUILD A BETTER FUTURE?

A legacy gift to the Diocese of St. Augustine will support the Catholic Church in North Florida today and for generations to come. Planned gifts are simple to arrange and often return benefits back to you.

For example, you can:

- Make a gift today that costs you nothing during your lifetime.
- Receive guaranteed payments for life in return for your gift
- Donate life insurance you no longer need.
- Preserve your estate for your children and deliver ongoing support to the Diocese of St. Augustine.
- Use a gift to reduce your estate tax exposure and eliminate capital gains.

Make a difference by leaving a lasting tribute to your parish, school or favorite ministry. Contact Cliff Evans at the Catholic Foundation for more information or visit our website: www.dosafl.com/catholic-foundation



11625 Old St. Augustine Road
Jacksonville, FL 32258-2060

Cliff Evans, OFS, MA
Planned Giving Officer

Office: 904-208-6931
Fax: 904-262-0698

Cevans@dosafl.com

**Remember your Church
in your will or trust!**