



Catholic Foundation
DIOCESE OF ST. AUGUSTINE

SO THAT THEY
MAY ALL BE ONE

2019-2020 ANNUAL REPORT

CONNECTING CATHOLICS

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WELCOME FROM BISHOP ESTÉVEZ



Dear Brothers and Sisters in Christ,

This past year has been very difficult, with much suffering. But, despite all the challenges and disappointments – courage, creativity, and generosity abounded. I am so grateful to all who have lovingly contributed to the care and wellbeing of God’s people during this time. Your efforts, however small, are a reflection of Christ’s love. Thank you!

With tremendous gratitude, I am pleased to share the 2019-2020 Annual Report of the Catholic Foundation, Diocese of St. Augustine with you. In this year, that we began our celebration of the 150th anniversary of the Diocese of St. Augustine, we recognize the beautiful diversity of our Church and we seek to become one, through love.

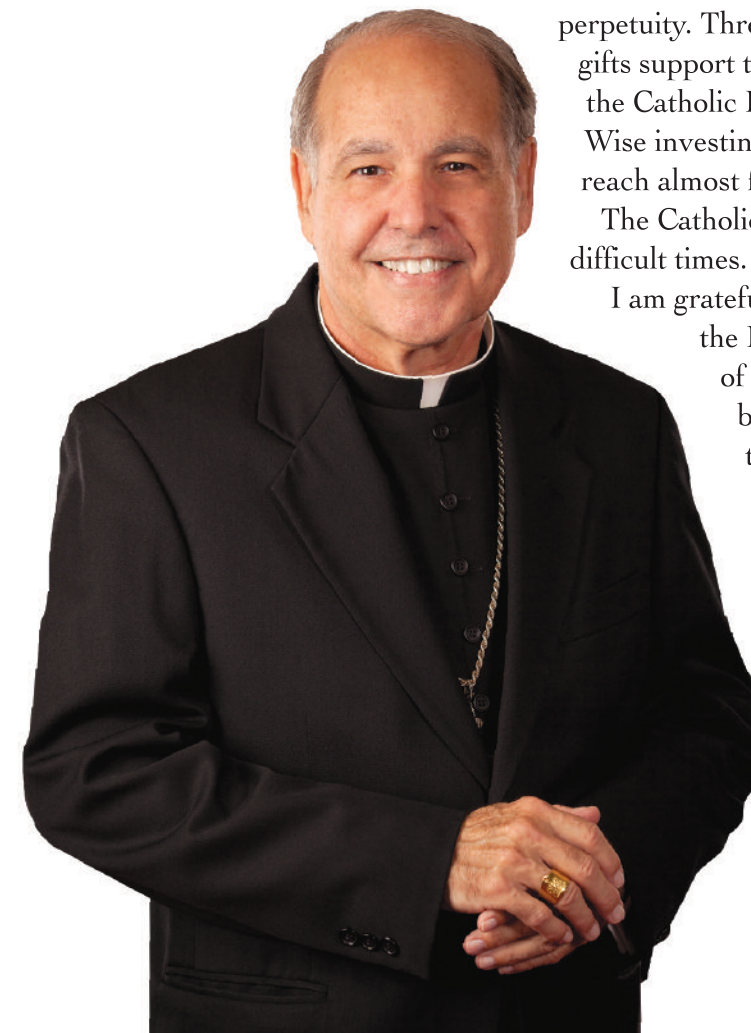
The work of the Catholic Foundation benefits all the faithful across our diocese – especially the poor, and those from our rural and inner-city communities. The Foundation’s vision of a sustainable Church ensures the Gospel will be proclaimed in North Florida in perpetuity. Through the generosity of many – whose meaningful gifts support the parishes, schools, and ministries of our diocese – the Catholic Foundation continues to grow, even in difficult times. Wise investing of these gifts has allowed the endowment to reach almost forty million dollars.

The Catholic Foundation has prospered so well – even in these difficult times. I see wise stewardship of those resources and I am grateful for the prudent direction and steadfast work of the Foundation Board of Directors and staff. It speaks of so many positive things for the future, ensuring the beauty of the Body of Christ will remain available to all who seek Him.

May Christ be with you as we continue to build a Christ-centered future for our Church. I am,

Sincerely yours,

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



IN MEMORIAM

We remember two of the Catholic Foundation's founding fathers.

Bishop John J. Snyder, a good and faithful servant, died on September 27th, 2019. He led the Diocese of St. Augustine during a period of tremendous growth, 1979 – 2000, and his vision to sustain the church led to his founding of the Catholic Foundation.

His many accomplishments included building new parishes, schools, a diocesan headquarters, low-income housing for the elderly, a nursing home, and a retirement home for priests. Bishop John J. Snyder High School proudly bears his name.

Bishop Snyder was known as the people's bishop. He reached out to marginalized groups – the divorced, the disabled, the LGBTQ community, inmates, farmworkers, refugees, and immigrants – and welcomed them to the church. The disabled were close to his heart and he established the Ministry for Persons with Disabilities. Today, children and adults with disabilities come from all over the country to attend summer camps at Camp I Am Special. Though he was considered to be a prince among men, he was approachable and lived to serve ordinary people.

Robert "Bob" Shircliff passed peacefully into the Lord's hands on January 2nd, 2020. Though he called himself "this little guy from Indiana", he is known as "one of the great people in this city's history."

He lived a life of integrity, philanthropy, grace and faith. His achievements are many and far-reaching.

St. Vincent's Hospital, now known as Ascension St. Vincent's, was near and dear to his heart. His contributions of time, talent, and treasure were so great, the hospital's street address was changed to "1 Shircliff Way". In 1984, as chairman of the Diocese of St. Augustine's fund-raising task force, he recommended to Bishop Snyder that the Catholic Foundation be created.

Bishop Snyder and Bob Shircliff were friends, visionaries, true gentlemen, and above all, the Lord's servants. We are grateful for the transformational work these great men contributed to our church and community and honored to bear witness to their vision of sustaining the church into perpetuity.

Bishop Snyder and
Bob Shircliff, 2017,
Catholic Foundation
30th Anniversary
Celebration.



LETTER FROM BOARD CHAIR & EXECUTIVE DIRECTOR

*"Lord, teach me to
be generous.
Teach me to serve
You as You deserve."
- St. Ignatius of Loyola*

Dear Friends,

The 2019-2020 fiscal year brought much expectation and many anticipated milestones, both for the Catholic Foundation and in our personal lives.

We were confronted, though, with uncertainty and disappointment, as the COVID-19 virus spread throughout our communities, our nation, and the world. Many continue to suffer, experiencing great personal losses.

In the face of these losses, we also witnessed great love. We saw our clergy, school staff, fellow Catholics and neighbors care for the needy all around us. This charitable spirit, enacted by the Body of Christ, is such an inspiration!

Through the generosity of its many benefactors, the Catholic Foundation was able to provide stabilizing support for many of our parishes, Catholic schools, and ministries who are beneficiaries of the 140+ restricted funds within our endowment. We were also able to provide \$100,000 in grants to Catholic programs and ministries throughout our diocese. All of this was made possible because of the vision of those who came before us.

In this report you will find several stories of those visionaries who have left a lasting legacy in their parish or the diocese. Their desire to support the work of the Church for future generations, long after they are gone from this world, is realized in the meaningful work that continues today.

We encourage you to think about the ways the Church has impacted your life and to consider investing in the future of that ministry. You can give thanks to God and be a gift to others, especially in times of uncertainty.

Gratefully yours,

John J. McLaughlin
Board Chair



Patricia K. DiSandro
Executive Director

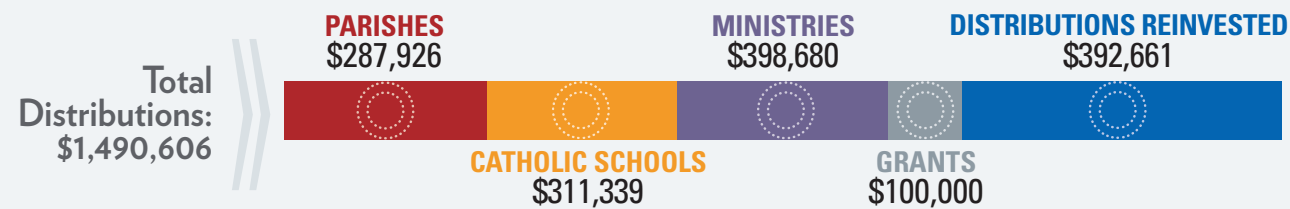


2019-2020 DISTRIBUTIONS AND GRANTS

The Catholic Foundation supports the mission of the Church by helping parishes, schools, and ministries build a future for their good works through inspired charitable giving. The Foundation provides grants and other distributions to fund these good works that bring life to the Gospel teachings.

In 2020, the Catholic Foundation distributed a total of \$1,490,606 to fund recipients and grants awardees throughout the Diocese of St. Augustine. These grants are made possible by formative contributions from the Diocese of St. Augustine, as well as generous donors who have given to the permanent unrestricted endowed fund of the Catholic Foundation. In addition, \$103,994 was paid to beneficiaries of gift annuities managed by the Catholic Foundation. Total giving from these charitable instruments and the Foundation's endowment in 2020 was \$1,594,600.

Fiscal year 2019-2020 saw \$997,944.70 in distributions received by 60 of 128 eligible restricted funds. These financial resources are the annual disbursements that restricted fund beneficiaries use to support our parishes, schools, and ministries in achieving their missions.



“For grace is given not because we have done good works, but in order that we may be able to do them.”

- Saint Augustine

ENDOWED FUNDS

PARISHES

Assumption Catholic Church
Basilica of the Immaculate Conception
Blessed Trinity Catholic Church
Blessed Trinity - General
Blessed Trinity - Joyce A. Aycocke
Cathedral Basilica of St. Augustine
Cathedral Basilica - General
Cathedral Basilica Liturgical
Christ the King Catholic Church
Christ the King - General
Christ the King - Joyce A. Aycocke
Christ the King SVDP
Christ the King Youth
Corpus Christi Catholic Church
Crucifixion Catholic Church
Epiphany Catholic Church
Holy Cross Mission
Holy Faith Catholic Church
Holy Family Catholic Church – Jacksonville
Holy Family – General
Holy Family - Joyce A. Aycocke
Holy Family Catholic Church - Williston
Holy Rosary Catholic Church
Holy Spirit Catholic Church
Mary, Queen of Heaven Catholic Church
Most Holy Redeemer Catholic Church
Our Lady of Consolation Catholic Church
Our Lady of Good Counsel Catholic Church
Our Lady Star of the Sea Catholic Church
Prince of Peace Catholic Church

Queen of Peace Catholic Church
Resurrection Catholic Church
Sacred Heart Catholic Church - Green Cove Springs
Sacred Heart Catholic Church - Jacksonville
San Jose Catholic Church
San Jose - General
San Jose - Joyce A. Aycocke
San Juan del Rio Catholic Church
San Juan del Rio Bell Tower
San Juan del Rio - General
San Juan del Rio Perpetual Care
San Juan Mission
San Sebastian Catholic Church
Santa Maria del Mar Catholic Church
St. Ambrose Catholic Church
St. Ambrose Cemetery
St. Ambrose - General
St. Anastasia Catholic Church
St. Anthony the Abbott Mission
St. Augustine Catholic Church & Student Center - Gainesville
St. Catherine of Siena Catholic Church
St. Edward Catholic Church
St. Elizabeth Ann Seton Catholic Church
St. Francis of Assisi Mission
St. Francis Xavier Catholic Church
St. John Paul II Catholic Church
St. John the Evangelist Catholic Church - Chiefland

St. John the Evangelist Catholic Church - Interlachen
St. Joseph Catholic Church
St. Luke Catholic Church
St. Madeleine Sophie Catholic Church
St. Madeleine - General
St. Madeleine Memorial Gardens Perpetual Care
St. Mary Catholic Church - Bunnell
St. Mary, Mother of Mercy Catholic Church - Macclenny
St. Matthew Catholic Church
St. Matthew – General
Leona Shelkofsky Scholarship
St. Michael Catholic Church
St. Michael - General
St. Michael Cemetery
St. Monica Catholic Church
St. Patrick Catholic Church - Gainesville
St. Patrick Catholic Church - Jacksonville
St. Paul Catholic Church - Jacksonville
St. Paul Catholic Church - Jacksonville Beach
St. Paul – General
St. Paul Religious Education for Youth
St. Peter Mission
St. Philip Neri Mission
St. Pius V Catholic Church
St. William Catholic Church

CATHOLIC SCHOOLS

All-Schools Scholarship
Annunciation Interparish School
Assumption Catholic School
Bishop John J. Snyder High School
Bishop John J. Snyder High School - General
BJSH Nu-Trend Scholarship
BJSH Vallencourt Scholarship
Louis E. & Genevieve C. Joos Trust - Bishop John J. Snyder High School
Bishop Kenny High School
Bishop Kenny High School – General
Louis E. & Genevieve C. Joos Trust - Bishop Kenny High School
Blessed Trinity Catholic School
Cathedral Parish School

Christ the King Catholic School
Diocesan Education
Epiphany Catholic School
Guardian Catholic School
Holy Family Catholic School
Holy Spirit Catholic School
James & Elizabeth Mullen Nassau County Catholic Education
Morning Star Catholic School
Palmer Catholic Academy
Queen of Peace Catholic Academy
Resurrection Catholic School
Sacred Heart Catholic School
San Jose Catholic School
St. Elizabeth Ann Seton Catholic School

St. Francis Catholic Academy
Kipp W. Kennedy M.D. Scholarship
St. Joseph Academy – St. Augustine
St. Joseph Catholic School - Jacksonville
St. Matthew Catholic School
St. Michael Academy
St. Michael Academy - General
St. Michael Academy Don Fuller Scholarship
St. Patrick Catholic School - Jacksonville
St. Patrick Interparish School - Gainesville
St. Paul Catholic School - Jacksonville
St. Paul - General
Brizard Scholarship
Brizard – Button Family
St. Paul Catholic School - Jacksonville Beach

MINISTRIES

Campus Ministry
Caroline Sandow Alpha Retreat Scholarship
St. Augustine Catholic Church – University of Florida
Steven O'Connell Catholic Gators Scholarship
Camp St. John Chapel
Catholic Charities
Bishop John J. Snyder Catholic Charities, Camp I Am Special Maintenance
Catholic Charities - General
Catholic Charities Bureau, Gainesville, FL
Catholic Charities Jacksonville Regional Office
Catholic Charities Lake City Regional Office
Catholic Charities St. Augustine Branch
Disabilities Ministry

Edward I. Devlin Orphan Care & Adoption
Family Housing Management Co., Inc.
Diocesan Cemeteries
Perpetual Care Fund
San Lorenzo – Rosa McNally
Diocesan Center for Family Life
Diocesan Christian Formation Ministry
Christian Formation Ministry
Evangelization
Women's Formation Scholarship
Office of Human Resources
Office of Youth & Young Adult Ministries
Prison Ministry
Respect Life
Shrine of Our Lady of La Leche

St. Vincent de Paul Society
St. Augustine Diocesan Council,
Society of St. Vincent de Paul, Inc.
St. Vincent de Paul Society
Beaches Conference
St. Vincent de Paul Society, Inc.
Vocations – General
Irvin & Saralee Peters Casa San Pedro
Late Vocations
Louis E. & Genevieve C. Joos Trust - Vocations
Office For Education of Seminarians
Priests' Long Term Care
Sisters' Retirement
Social Justice Education For Priests

ST. VINCENT DE PAUL SOCIETY GRATEFUL FOR SUPPORT, THEN AND NOW.

By: Lilla Ross

As each has received a gift, use it to serve one another,
as good stewards of God's varied grace.

1 Peter 4:10

In 1944, Edward I. Devlin donated 200 shares of common stock in the Manati Sugar Company to the Diocese of St. Augustine. This gift, valued at \$10,000, was given for the benefit of the St. Vincent de Paul Society of St. Augustine. It was Mr. Devlin's desire the funds be used "for the amelioration of suffering and relief of the poor and distressed." That was a lot of money in the middle of World War II. In the past 75 years, the endowment has grown and become an important source of annual support for the work of the St. Augustine conference.

Before there were endowment funds, the first conference of the St. Vincent de Paul Society in the diocese, organized in 1914 at Immaculate Conception Parish, sold subscriptions to Our Sunday Visitor magazines, which brought in between \$1,500 and \$2,500 a year. Today's 380 members no longer sell magazine subscriptions. Their work is supported through donations, fundraisers, the revenue from six thrift shops and the endowment at the Catholic Foundation. Today, the Catholic Foundation holds four restricted funds which benefit St. Vincent de Paul societies in the diocese – Jacksonville, St. Augustine, Christ the King Catholic Church and the Beaches Conference.



Bob, Gabe and Austin Moore from St Vincent de Paul Thrift Store, helping unload donations.



St. Vincent de Paul volunteers distributed over 1200 gifts for local children.

An anonymous gift of \$100,000 recently established the St. Vincent de Paul Society Beaches Conference Fund in the Catholic Foundation's endowment. As a result of this donor's selfless generosity, the Beaches Conference will receive yearly disbursements in perpetuity, beginning next year. "I'm proud that someone thought so well of our conference that they would give us that much money. They wanted to make sure we continue. It says a lot for the volunteers," said Candyce Breidert, president of the Beaches Conference. The conference has about 40 volunteers with a core of 20 regularly active volunteers. "Normally we help about 25 families a month, but between March and May this year we helped 168," Breidert said.

Though much has changed since the gift of stock was received in 1944, there is still great need all around our diocese. "It doesn't matter where you live in the diocese, whether it's Ponte Vedra or rural counties, there are always people in need. Now more than ever," said Denise Bunnewith, president of the diocesan St. Vincent de Paul Council. The coronavirus pandemic has added to the number of people who are in need. "We're seeing

people with nice houses and cars asking for assistance because they're out of work," she said.

The Society has 19 conferences in the diocese which helped more than 50,000 people with such things as emergency rent and utilities, transportation, food, and furniture. Bunnewith said working with those in need also provides an opportunity for evangelization. "We pray with them. Sometimes they need encouragement," she said. "We try to see the face of Christ in them, and we hope they see the face of Christ in us."

MULLENS LEAVE A LEGACY FOR CATHOLIC EDUCATION IN NASSAU COUNTY

By: Lilla Ross

Jim and Betty Mullen never had children, but they found a way to positively impact Catholic school children.

The Mullens, who were parishioners at St. Michael Catholic Church in Fernandina Beach, left a charitable remainder trust to benefit Catholic education in Nassau County. The trust is now part of the endowment of the Catholic Foundation.

Jon Hay, the Mullens' estate attorney, helped them set up the trust during their estate planning in 1997.

The Mullens were originally from England and settled in Atlanta, where Jim had a successful packaging business and Betty was a nurse. They retired on Amelia Island, where Jim stayed busy in his woodworking shop and tinkering with a sailboat docked behind the house, Hay shared. Their property in Atlanta was used to set up the trust, funded by rental income that provided them valuable income for 20 years.

Jim died in 2004. Betty continued to live on her own, even as macular degeneration took her eyesight. "Whenever we'd check on her she'd say, 'I'm always on duty,'" Hay said. "She loved music, upbeat music she had probably danced to when she was younger." She passed in 2016.

When the trust expired in 2017, the remainder went to a permanent endowment to benefit Catholic education in Nassau County.

"She told me any number of times how important education was and how she wanted to do something for local young people," Hay said. "I think she was helping the children she never had."



Betty Mullen (seated) with Ann Tatum.

Deacon Scott Conway, superintendent of Catholic schools, said, "The Mullens' generous support of the vision of Catholic education in Nassau County will have an impact that would never have been imagined by the Mullens when they initiated this fund.

The James & Elizabeth Mullen Nassau County Catholic Education Fund has already assisted Catholic education in Nassau County by providing the seed money to begin a new Early Learning Center. We are expecting to build an elementary and high school in the Nassau County area in the next 15 years.

We are so thankful for the generosity of the Mullens."

Betty also left an IRA to

St. Michael Academy, Hay said.

Hay said people often don't think they have enough money to be philanthropists. "I tell them that the definition of 'rich' is someone who has more money than you do. And you have more money than someone, too. It's all relative. I suggest that they think about doing well by doing good."

The Mullens received a substantial tax deduction when the trust was established and paid tax only on the annual distributions they received over time. And the money in the endowment is tax-free for the charity it benefits.

BRIZARD-BUTTON FAMILY'S MEMORY LIVES ON AT ST. PAUL CATHOLIC CHURCH AND SCHOOL

By: Lilla Ross

The legacy of the Brizard family is a picture of faithfulness, frugality and a commitment to Catholic education.

In 1915, when Lezin J. and Lydia Brizard moved to Jacksonville from Louisiana, they settled in Riverside and joined St. Paul Catholic Church. They had five children: Joseph, Eloise, Vivian, Alice and Cecile. After they retired, Eloise, Cecile and Alice lived together in the family home on College Street and were daily communicants at St. Paul.

"They lived extraordinarily modest lives and were able to accumulate a sizable legacy," said their attorney Bill Joos. "They invested their money wisely, and they didn't spend. And they loved their church."

When Eloise died in 1990, Joos said that her two surviving sisters, Cecile and Alice, her beneficiaries, disclaimed the bequests on Joos' advice resulting in a charitable bequest to St. Paul School and savings in estate tax. He also recommended that Cecile and Alice consider leaving endowments equally to St. Paul parish to support the St. Paul School, and the diocese for its ministries. "Those endowment funds build in value and provide an annual distribution for the purposes for which they were set up, in perpetuity," Joos said.

Cecile and Alice each created charitable remainder trusts to benefit equally the school and the diocese. Upon their deaths, more than \$3.1 million was left to the Catholic Foundation of the Diocese of St. Augustine as endowment gifts.



"On a personal level, I am thankful that my friendship with the Brizard and Button sisters and my legal advice to them has resulted in endowment gifts that are now valued at about \$4.9 million, and that these endowment gifts have resulted in annual distributions which should continue in perpetuity," Joos said.

Father George Vaniyapurackal, pastor of St. Paul - Riverside, said the Brizard's gifts have laid a foundation for the parish and school that have helped them fulfill their joint mission.

In recent years, the endowment has helped the church and school pay for many shared facilities.

In addition, the Brizard Scholarship Fund helps pay tuition for many students, especially during the summer months, Father George said.

For St. Paul principal, Kim Repper, this annual distribution is a lifesaver. "I've been here 10 years, and it's an amazing reassurance to know that you have the recurring source of funding to support whatever has hit you in the face," Repper said. "This building is almost 100 years old, and it's always something — the plumbing, the roof, the A/C. And now COVID-19."

Repper described the funds the school receives each year as "a wonderful safety net." "I can't imagine that these ladies knew what the impact of their gift would be. Because that money is invested properly, each year we know we will get something that will help us continue our mission of helping St. Paul's children. It will have significant impact for years to come."



SAN JUAN DEL RIO PREP SPECIAL NEEDS PROGRAM

By: Kim Howard

But Jesus said, "Let the children come to me, and do not prevent them; for the kingdom of heaven belongs to such as these." Matthew 19:14

The San Juan del Rio Prep Special Needs program was inspired by the 42 registered families who have children with special needs.

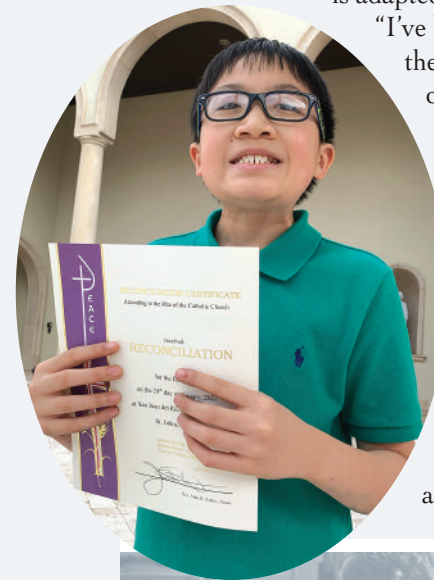
Monina Mulleague, the religious education coordinator for this St. Johns County parish, leads a hands-on, fully customizable program designed to help children better understand their faith and bring them closer to God. The faith formation curriculum, from Loyola Press, is adapted for children with special needs.

"I've had parents come to me in tears because they can't go to Mass because the music overly sensitizes their children, such as bells, even coughing. They are so overwhelmed," she said.

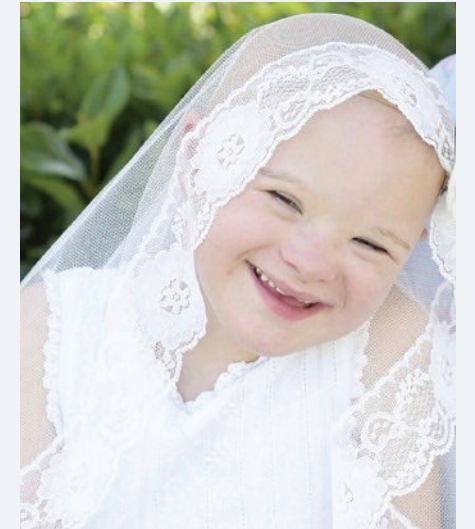
This program gives parents hope through specialized catechetical support with monthly meetings and training on how to use the program. The PREP Special Needs team guides families through the curriculum, offering individual assessments for each child.

In 2020, the Catholic Foundation awarded a grant from its unrestricted endowed funds to San Juan del Rio Parish to help launch their PREP Special Needs program. The flexible program has various models which are adapted and matched to the specific needs of the child, including both integrative classroom and at-home options. Learning tools – foam puzzles, finger puppets, picture cards – are an integral part of the curriculum and can be used at home. (Don't worry, all the manipulatives are thoroughly sterilized between users!)

The Church calls for all baptized to have accessible faith formation. The PREP Special Needs program accompanies families and children with specific learning needs, leading them to the sacraments. Monina Mulleague joyfully invites all parishes to join San Juan del Rio, the largest PREP program in the diocese, on their journey to serve special needs children in their faith formation.



Monina Mulleague demonstrates learning tools to Catholic Foundation board member and Grants Review Committee Chair, Mary Pat Kulik.



San Juan del Rio First Communicant

"Despite their challenges and hardships, they too have the same divine calling as everyone else. They are not just recipients but are also capable of proclaiming the Gospel and a witness of Christian boldness, strength, and courage, carrying out the virtues that we all hope for. They enrich every aspect of Church life."

- Monina Mulleague
Religious Education Coordinator
San Juan del Rio Catholic Church

CONNECTEDNESS | FORMATION | OUTREACH

The Catholic Foundation utilizes a competitive grant process to distribute a percentage of funds from the unrestricted portion of the endowment. This fund has grown significantly over the years because of the many donors who have contributed, especially the Diocese of St. Augustine and the Brizard family, with the mission of our Church in mind.

This year the Foundation was honored to award grants totaling \$100,000 to 17 deserving applicants in the Diocese of St. Augustine. Their programs align with Bishop Estévez's funding priorities of connectedness, formation, and outreach. Every year, the Foundation must turn down a portion of the grant proposals we receive because there are always more requests for financial support than we have available in our grant pool. If you would like to help us grow the funds available in our grant pool by making a gift to the unrestricted fund of the endowment, please contact us at 904-262-3200 or visit our website at cf.dosafl.com for more information.

2020 GRANT RECIPIENTS

Bishop John J. Snyder High School
Baker County Initiative (Outreach) - \$1,500

Catholic Charities
Camp I Am Special (Outreach) - \$7,400

Epiphany Catholic School
Rural Education Initiative (Formation) - \$10,000

Office of Christian Formation
Certification Program (Formation) - \$2,000

Office of Communications
Parish Communication Tools (Connectedness) - \$7,080

Office of Family Life
Stephen Ministry (Outreach) - \$7,900

Office of Youth & Young Adult Ministry
Impact Day of Service (Formation) - \$1,500
Servant's Heart Camp (Outreach) - \$1,500
Urban Plunge (Outreach) - \$6,000

San Juan del Rio Catholic Church
Prep Program for Special Needs Students (Formation) - \$2,300

San Juan Catholic Mission
Storage for Food and Clothing Bank (Outreach) - \$3,500

Shrine of Our Lady of La Leche
Walk with Our Lady of La Leche (Connectedness) - \$10,000

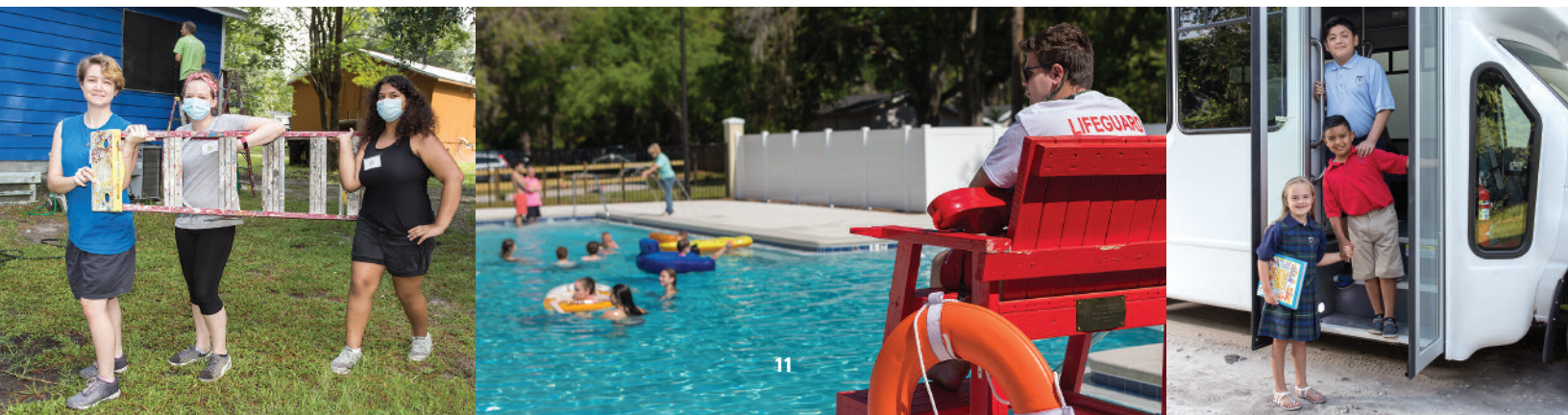
St. Francis Catholic Academy
Rural Education Initiative Technology Support (Formation) - \$9,000

St. Francis Xavier Catholic Church
Rural Education Initiative (Formation) - \$10,000

St. John the Evangelist Catholic Church, Chiefland
Emmaus and Cursillo Programs (Formation) - \$3,720

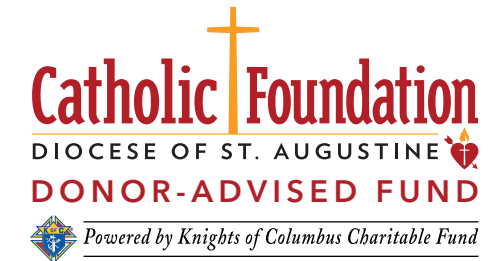
St. Patrick Catholic Church, Jacksonville
Painted Sanctuary (Connectedness) - \$8,000

St. Paul Catholic School, Jacksonville
Laptops for Students (Formation) - \$8,600



CATHOLIC FOUNDATION LAUNCHES DONOR-ADVISED FUND

In partnership with the Knights of Columbus Charitable Fund, the Catholic Foundation Donor-Advised Fund provides individuals and families the opportunity to maximize their philanthropic impact while remaining faithful to the teachings of the Catholic Church. We screen all charities to verify they align with our Catholic values. Did you know that you can transfer your existing donor-advised fund from another financial institution to the Catholic Foundation?



Visit us: cf.dosafl.com/donor-advised-fund/ | SIMPLE. FLEXIBLE. CHARITABLE. *Catholic.*

CATHOLIC FOUNDATION PRESENTS ESTATE PLANNING PROFESSIONALS FORUM



The Honorable John Delaney, Featured Speaker

On February 6, 2020, estate planning professionals from around the community gathered at the River Club in downtown Jacksonville to learn about the vital work and impact of the Catholic Foundation. As former mayor of Jacksonville (1995-2003) and retired president of the University of North Florida (2003-2018), Mr. Delaney shared his personal insights on the positive impact philanthropy and charitable foundations bring to the community. Attendees also learned about the good works of Camp I Am Special, an endowment fund partner of the Catholic Foundation and ministry of Catholic Charities.

DICK MORALES HONORED AT CATHOLIC FOUNDATION ANNUAL MEETING

On February 27, 2020, Mr. Ricardo "Dick" Morales was awarded the Bishop John J. Snyder Legacy Leadership Award, in honor of the 8th bishop of the Diocese of St. Augustine and Catholic Foundation founder. Mr. Morales played an integral role in the foundation's growth during his service as a board member 2012-2018 (Board Chair 2014). A faithful servant and parishioner of San Jose Catholic Church, he worked tirelessly to promote the good works of both the foundation and our Church. The Catholic Foundation is honored to sponsor an honorary gift of \$1,000 on his behalf, benefiting his parish's restricted fund.



Bishop John J. Snyder Legacy Leadership Award recipient, Dick Morales, with Bishop Felipe J. Estévez.

MEANINGFUL IMPACT, THROUGH BOUNDLESS LOVE

Augustin Verot, first Bishop of the Diocese of St. Augustine, had an abiding commitment to the growth and impact of the Church through education, Catholic teaching, and vocations. The Order of Augustin Verot recognizes the importance of planned gifts – bequests and other legacy gifts, supporting the work of our Church in North Florida for generations to come.

Membership in the Order of Augustine Verot is reserved for those generous individuals who notify the Catholic Foundation that they have made estate or other gift plans to benefit their parish, school, or a beloved ministry.

If you have made a faith legacy gift plan including our Church, and you are not listed among our valued Order of Augustin Verot members, please let us know. We are happy to register your gift intentions and add you to our legacy society membership.



ORDER OF AUGUSTIN VEROT FAITH LEGACY GIVING

- MEMBERSHIP AS OF MARCH 31, 2021 -

Dr. Maria Acosta-Rua
 Ms. Judith Adkins
 Mark† & Rita Allen
 Mr. & Mrs. John Anderson
 Elmer Aponte
 Dennis M. & Mary H. Axman
 Mr. & Mrs. Charles Baer
 Ms. Kathleen Bagg
 Maximo & Sylvia Balbarez
 Donald Ballish
 Mr. & Mrs. Edward Barbarito
 Martha Barrett
 Mr. Raymond Basso
 Agatha Anne Baur
 Mrs. Doris Baumgartner
 Marilyn & Anthony Belo
 Mr. Frank Benischeck
 Mrs. Lisa Benton
 MG Paul & Janet Bergson
 Mr. Leo Blatz
 Msgr. James Boddie
 Mr. & Mrs. Ernest Bono
 Mr. & Mrs. Kevin Brown
 Mr. & Mrs. Joseph Brozovich
 Mr. & Mrs. Brian Cabrey
 Stanton L. Cadow, in Memory of -
 America Jean Morris Cadow
 Mrs. Gertrude Cameron †
 Juanita R. Campbell
 Mr. & Mrs. Michael Cascone, Jr.
 Mr. Victor Chew
 Mr. & Mrs. Thomas Claridge
 Rev. Peter Colasurdo
 Wayne & Donna Colvin †
 Mrs. Jacqueline Comstock
 Mr. & Mrs. Tommy Crowder
 Mrs. Marlise Cusick
 Mr. & Mrs. Eugene Dagg
 Concetta DeLisi
 Mrs. Betty Demetree
 Michael & Barbara Denison
 Mr. & Mrs. Louis DePetris
 George & Pam Dewey
 Mr. Cosmo DiPerna
 Mrs. Patricia K. DiSandro
 Mr. & Mrs. David Donaldson
 Dr. & Mrs. Walter Eaton
 Mr. & Mrs. James Eckert
 Allison Le Elias
 Mr. & Mrs. Jerry Ellis
 Mr. & Mrs. Rodolfo Engmann
 Dick & Diane Erickson
 Most Rev. Felipe J. Estévez
 Cliff & Debbie Evans
 Lee M. & Nancy S. Evans
 Mrs. Doris Faustini
 Ms. Alice Ferrari
 Mrs. Shirley Fewox
 Beverly & Michael Flanagan

Edward James Fleming, Jr. & Debora Ann Fleming
 Mrs. Judith Franklin
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 John M. Giorgianni & Dr. Angela S. Martin
 Mr. & Mrs. John Gribbin
 Deacon & Mrs. Larry Hart
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 Mr. & Mrs. John Hay
 Mr. & Mrs. Kurt Hearth
 Mrs. Margaret Helou
 Msgr. James Heslin †
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 Dr. Mary Hughes
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 Robert W. & Cynthia Kastner
 Paul & Kathy Kerins
 Ms. Karen King
 Mr. & Mrs. James Knutzen
 Msgr. Eugene C. Kohls, J.C.D.
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 Janet LaFrance
 Michele Therese Leahy in Memory of Mary B. Leahy
 Mrs. Dorothy Legere †
 Ms. Mary L'esperance
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 Mr. & Mrs. Kenneth Shafer
 Cynthia Sharpe, in loving memory of -
 Rose Turner and Wayne Sharpe
 Mr. (†) & Mrs. Robert T. Shircliff
 Mrs. Alicia Sierra-Reyes
 Ms. Marjorie Simpson †
 Ms. Gayle Smith
 Mrs. Julie Snow
 Most Rev. John J. Snyder †
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 M. Elaine Zurek & Timothy T. Wojciechowski
 Judy A. Wolford
 Mr. & Mrs. Alton Yates
 Katharine K. Zambetti
 Rev. Steven Zehler

† Deceased

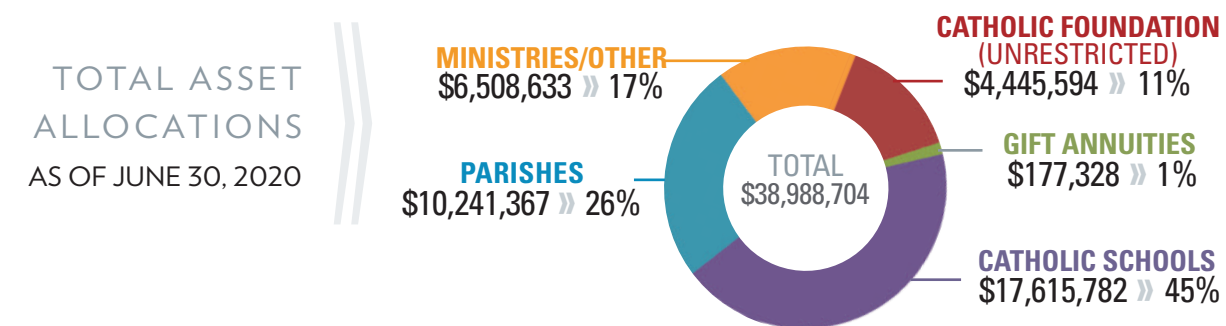
STATEMENT OF ACTIVITIES AND CHANGES IN NET ASSETS | AS OF JUNE 30, 2020

REVENUE, GAINS & OTHER SUPPORT	19-20 Data	18-19 Data
Contributions	\$860,004	\$377,979
Investment income	\$747,169	\$1,381,886
Market gains (unrealized)	\$2,309,886	\$2,153,473
Other revenue	\$45,779	\$5,358
Total revenue, gains and other support	\$3,962,838	\$3,918,696
EXPENSES		
Grants and fund distributions	\$1,490,606	\$1,464,481
Annuitant payments	\$103,994	\$102,254
Operating expenses	\$244,066	\$230,905
Total disbursements and expenses	\$1,838,666	\$1,797,640
Changes in net assets	\$2,124,172	\$2,121,056

NET ASSETS

Beginning of year	\$36,864,532	\$34,743,476
End of year	\$38,988,704	\$36,864,532

Note: Certain reclassifications have been made to the 2019 financial statements to conform to the 2020 presentation. Total net assets and change in net assets are unchanged due to these reclassifications.

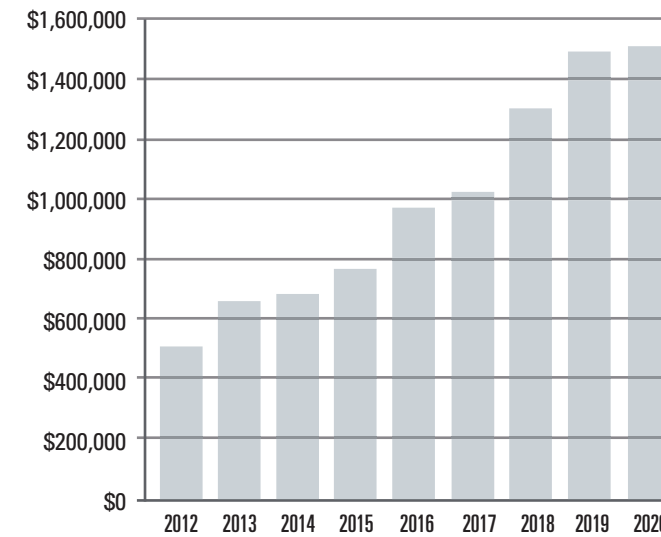


CATHOLIC FOUNDATION

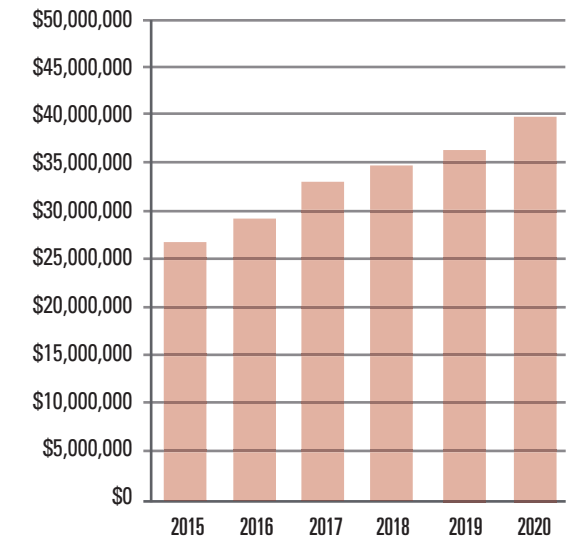
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For a copy of the independent auditor's report for the Catholic Foundation's fiscal year ending June 30, 2020, please write to: Diocese of St. Augustine | Attn: Fiscal Office | 11625 Old St. Augustine Road | Jacksonville, FL 32258
IRS Form 990 is available at www.guidestar.org.

ENDOWMENT DISTRIBUTIONS



NET ASSET GROWTH



HIGHLIGHTS

- \$2,124,172** Net Increase In Total Assets
- \$1,490,606** Distributed To Fund Beneficiaries Throughout The Diocese
- \$100,000** In Grants Awarded To Diocesan Entities For 17 Projects
- 115** Individual Gift Plan Consultations
- 8** New Restricted Funds
- 11** New Order Of Augustin Verot Faith Legacy Gift Registrations

CATHOLIC RESPONSIBLE INVESTING

The Catholic Foundation partners with Christian Brothers Investment Services and Wells Fargo to align our investments with our mission – not only to produce returns to fund the good works of the Church in North Florida, but to reflect in the investments themselves the ethical and social beliefs of our Catholic faith.

Christian Brothers and Wells Fargo employ socially responsible investing, an investment strategy designed specifically to allow our mission to work in harmony with the management of our investment portfolios. This strategy includes:

- Catholic Investment Screening
- Active Ownership
- Diversified Asset Management

The Foundation adheres to the investment guidelines of the United States Council of Catholic Bishops and screens out companies that disregard Church teachings. As an investment strategy, this method seeks to actively improve companies by encouraging worker, environmental, and social reforms.

To find out more about our partnership with CBIS and Wells Fargo or to learn more about Catholic Responsible Investing go to cf.dosafl.com.

ABOUT THE CATHOLIC FOUNDATION

What does the Catholic Foundation do?

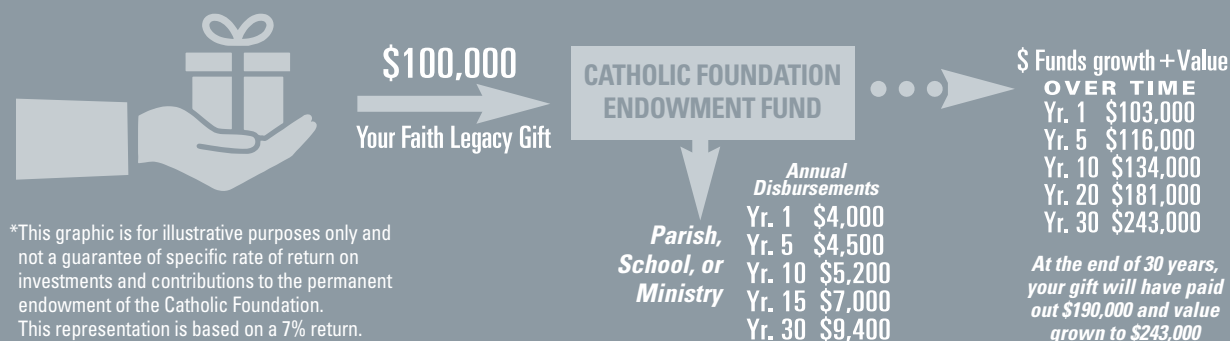
The Foundation establishes and manages permanently endowed, restricted and unrestricted funds, created to provide lasting support for the development and charity of our faith community. It offers practical partnerships to encourage giving generously now and through legacy gifts.

How are Foundation operations funded?

Each restricted fund beneficiary can receive an annual disbursement of 4% of the market value of its permanent account. Grants and operational expenses are funded by gifts which were not restricted to any specific parish, school, or ministry, up to 4%. A 0.75% fee is charged to each restricted fund to help with operations.

What are the advantages of endowment fund giving?

Funds gifted to an endowment account are held in perpetuity – the principal cannot be spent and will be invested prudently. These investments are made in accordance with Catholic values and are supervised by our Board of Directors, in addition to our Diocesan Fiscal and Bishop's Offices. Due to sound investment practices and consistent oversight, the endowment has continued to grow. A gift to our permanent endowment has lasting value and impact.



*This graphic is for illustrative purposes only and not a guarantee of specific rate of return on investments and contributions to the permanent endowment of the Catholic Foundation. This representation is based on a 7% return.

OUR VALUES

To live our Catholic faith and create sustainable growth and partnerships with parishes, schools, ministries, and donors in order to build a strong future where the faithful can fully and generously live out their baptismal call.

- » **FAITH**
Faithfully serving others in the name of the Lord
- » **INTEGRITY**
Adhering to the highest ethical and professional standards
- » **PARTNERSHIP**
Building relationships among parishes, schools, ministries, and donors
- » **SUSTAINABILITY**
Ensuring the growth of the Church for future generations through responsible stewardship of generous gifts and resources

2019-2020 CATHOLIC FOUNDATION BOARD OF DIRECTORS

“Faith in action is love – and love in action is service.”
- St. Teresa of Calcutta

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Bishop of St. Augustine

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Chancellor

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Chief Financial Officer, Diocese of St. Augustine

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Financial Advisor

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Wells Fargo Private Bank Managing Director & Senior Fiduciary Advisory Specialist

Mr. Andrew M. Woods
Ivan & Daugustinis, PLLC
Attorney / LL.M. in Taxation

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khoward@dosafll.com
904-208-6928



Our Mission

The Catholic Foundation builds a Christ-centered future for the good works of the Church in North Florida through inspired charitable giving.

Our Vision

The vision of the Catholic Foundation is a Church generously endowed to fully support the development and charity of our faith community.

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