



Catholic  Foundation
DIOCESE OF ST. AUGUSTINE 
2021-2022 IMPACT REPORT



TABLE OF CONTENTS

A Message From Bishop Pohlmeier	2
In Gratitude for Bishop Estévez	3
About the Catholic Foundation	4
Endowment – Restricted Funds Highlights	5
Restricted Endowed Funds – Ministries	6

Restricted Endowed Funds – Parishes	7 & 8
Restricted Endowed Funds – Schools	9 & 10
Impact Grants	11 & 12
Financial Activity & Catholic Investing	13 & 14
Order of Augustin Vérot	15 & 16
Foundation Leadership	17
Bishop John J. Snyder Legacy Leadership Award	18

FOR 35 YEARS, THE CATHOLIC FOUNDATION

has served the parishes, Catholic schools, ministries, and the Faithful of the 17 counties that make up the Diocese of St. Augustine. We give thanks to the forward-thinking donors and leaders who came before us. Because of their faith-filled generosity and wisdom, the Catholic Foundation provides a permanent and sustainable endowment for the good works of our Church in North Florida – coast to coast.

IN GRATITUDE FOR OUR BOARD CHAIRS

- 2021-2022** Mr. Kenneth R. Thompson, Jr.
- 2020-2021** Mr. William B. McMenemy
- 2018-2020** Mr. John J. McLaughlin, IV
- 2017-2018** Mr. Michael J. McNamara
- 2016-2017** Mr. Richard Mulvey
- 2015-2016** Mrs. Gwen Yates
- 2014-2015** Mr. Ricardo Morales
- 2012-2014** Mr. James Marx
- 2011-2012** Mr. Michael Altes †
- 2010-2011** Mrs. Mary Toomey
- 2009-2010** Mr. Clifford Lewis
- 2008-2009** Mr. John Sullivan †

- 2007-2008** Deacon George Good
- 2006-2007** Mr. Gerald Weedon
- 2005-2006** Mr. Jeffrey Quaritus †
- 2003-2005** Msgr. Vincent Haut
- 2001-2003** Mrs. Katherine Zambetti
- 1999-2001** Mr. Ernest Bono, Sr.
- 1997-1999** Mr. John Crawford
- 1995-1997** Mr. Robert Shircliff †
- 1994-1995** Mr. Warren Powers
- 1991-1994** Mr. George Helow †
- 1987-1991** Mr. Hobart Joost †

† Deceased

THANK YOU.



A MESSAGE FROM BISHOP POHLMEIER



Dear Brothers and Sisters in Christ,

Thank you for your outpouring of hospitality towards me over these past several months. I have enjoyed meeting so many of you in my travels throughout the diocese and I am grateful for the conversations and time we have shared.

Upon my arrival, I was pleased to see a focus on the sustainability of our Church in North Florida. Since 1987, we have been blessed by many faith-filled visionaries who laid the groundwork for a strong Catholic Foundation. We are grateful for their gifts of time, talent and treasure. Today, as we bear witness to the fruits of their wisdom and generosity, I encourage you to learn more about the Catholic Foundation so you, too, can play a part in being a protector of the future of our local Church.

I am honored to present the Catholic Foundation's 2021-2022 Impact Report. Within these pages you will see how your gifts strengthen our Church, providing sustainable support for the good works of the parishes, Catholic schools and ministries that bring us closer to Christ.

Despite the economic challenges of the past year, I am grateful the faithful have continued to generously provide for the ministry of our Church. May God's love be multiplied through these inspired acts of charity and service.

Gratefully yours in Christ,

A handwritten signature in blue ink, appearing to read "Erik T. Pohlmeier", with a long horizontal flourish extending to the right.

Most Reverend Erik T. Pohlmeier
Bishop of St. Augustine



IN GRATITUDE FOR BISHOP FELIPE J. ESTÉVEZ



Over the past decade, Bishop Felipe J. Estévez has led the Diocese of St. Augustine on an experience of encounter. During his time as ordinary, our diocese saw a significant increase in vocations, substantial growth in population and a renewed spirit of evangelization. He remained constant in directing our gaze to the source and summit of our Church, the most blessed Eucharist.



Photo by St. Augustine Catholic Magazine/FRAN RUCHALSKI

Bishop Estévez would say Mass does not end with the last procession; it begins. He encouraged us to go forth, and from our love for Jesus, act – practicing the corporal and spiritual works of mercy. He challenged us to become the hands and feet of Jesus with our charity.

During my time with the Catholic Foundation, I have been honored to work alongside Bishop Estévez, in service of our local Church. He remains a strong advocate for endowment giving and the foundation's vision for a Church generously endowed to fully support the development and charity of our Catholic community.



Photo by St. Augustine Catholic Magazine/WOODY HUBAND



Photo by St. Augustine Catholic Magazine/RUDY FOSCHI

We are forever grateful to Bishop Estévez for his leadership and care of all the people of our diocese.

In gratitude,
Patty DiSandro
Executive Director



Photo by St. Augustine Catholic Magazine/DAVID WALTERS



Photo by St. Augustine Catholic Magazine/ZACH THOMAS

ABOUT THE CATHOLIC FOUNDATION

How Your Gifts Sustain Our Church

- Your gifts will be used in the manner you choose. Both civil and canon laws ensure that your gifts are used according to your wishes.
- No gift is too small! Your gifts become very impactful when combined with the gifts of others through the Catholic Foundation's endowment.
- Your gifts are invested prudently with Catholic values, with oversight by our board of directors. The earnings from your gifts will begin to grow immediately.
- Your gifts live beyond you. Gifts to an endowment are held in perpetuity – the principal cannot be spent, and the earnings from your gifts will provide financial support to your Church forever.

How The Foundation Serves

- The foundation establishes and manages permanently endowed restricted and unrestricted funds, which provide annual financial support to the parishes, schools and ministries of the Diocese of St. Augustine.
- The foundation offers charitable gift annuities which provide fixed income payments for life, unaffected by fluctuations in interest rates and the stock market.
- The foundation supports the good works of our Church through grantmaking. Each year Catholic entities from our diocese are invited to submit funding requests, which are fully evaluated and selected by the board of directors.
- The foundation, in partnership with the Knights of Columbus Charitable Fund, offers a donor-advised fund, giving our donors the flexibility to make grants to charities which align with Catholic values.
- The foundation offers gift planning services, working closely with donors to ensure their gifts have the impact they desire.

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.



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

LASTING IMPACT

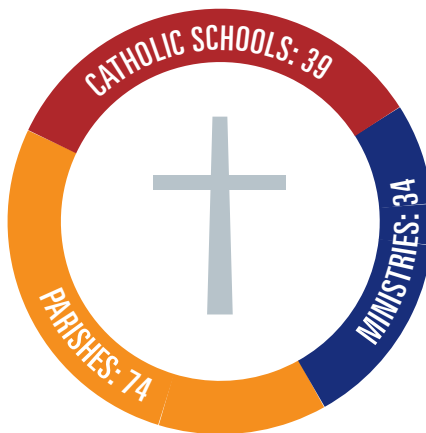
Your gifts to the Catholic Foundation help our church to serve and make a real difference – now and in the future. Parishes, Catholic schools and ministries use their restricted funds’ annual disbursements to advance their missions of faithful service to others in the name of the Lord.

[RESTRICTED FUNDS]

147
NUMBER OF
ENDOWED FUNDS

\$35.8M
MARKET
VALUE

\$1.41 M
ANNUAL
DISBURSEMENTS



Your gifts make a difference!

Did you know you can honor a loved one by creating a named endowment fund with a \$25,000 gift, benefiting your chosen parish, Catholic school or favorite ministry? To customize a fund to reflect what you love by endowing a gift today, contact us at catholicfoundation@dosafll.com.

Your gifts made in support of these ministries ensures the beauty of our faith continues through the good works of Christ.

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 Gainesville Regional Office
 Catholic Charities - General
 Catholic Charities Jacksonville Regional Office
 Catholic Charities Lake City Regional Office
 Catholic Charities St. Augustine Regional Office
 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 - General
 Evangelization
 Women's Formation Scholarship

Diocesan Office of Human Resources
 Diocesan Office of Youth & Young Adult Ministries
 National Shrine of Our Lady of La Leche
 Prison Ministry
 Respect Life
 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
 Irvin & Saralee Peters Casa San Pedro Retirement
 Home for Priests
 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
 Vocations - General

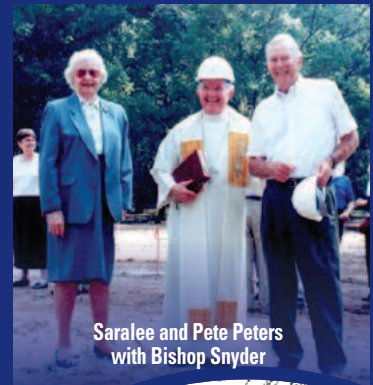
“The thanks must go to our Lord who made our gift possible.”

Saralee Peters wrote these words to Bishop John J. Snyder on October 21, 1999, after she and her husband, Captain I.G. “Pete” Peters, USN Ret., attended the groundbreaking ceremony for Casa San Pedro. She told Bishop Snyder it was “a wonderful and happy experience for Pete and myself.” A retirement home for diocesan clergy, Casa San Pedro was constructed on the grounds of Marywood Retreat and Conference Center in St. Johns, Florida. The beautiful home was made possible by a lead gift from the Peters, in addition to many other generous donors.

Denis Plumb, now retired from the Diocese of St. Augustine, worked closely with the Peters. She said, “They were delightful and fun people.” She further explained the chosen name of the property – Casa San Pedro – was a nod to the Peters’ generosity!

For over 20 years, Casa San Pedro has been home to clergy who have given themselves unselfishly to the Lord. Though Pete passed away in 2002 and Saralee in 2020, the Peters again blessed Casa San Pedro with their generosity! A gift from the Peters’ estate established the Irvin and Saralee Peters Casa San Pedro Endowment Fund, which will help maintain Casa San Pedro in perpetuity.

Join us in giving thanks to Pete and Saralee Peters and all the other generous donors who helped build Casa San Pedro.



Saralee and Pete Peters with Bishop Snyder



Parish endowed funds are a reliable, permanent source of financial support. Your gifts will grow these funds – now and in the future – supporting the good works of our beloved 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 Mission
 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 Baptist Catholic Church –
 Crescent City ***
**St. John the Baptist Catholic Church -
 Mayport ***
 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
 Leona Shelkofsky Scholarship
 St. Matthew - General
 St. Michael Catholic Church
**St. Michael – Catholic Student
 Assistance Fund ***
 St. Michael Cemetery
 St. Michael - General
 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

*** New Endowed Funds** - A very special thank you to our donors who created these new restricted funds.



Cynthia and Wayne celebrating their first wedding anniversary.

“God had a plan.”

About a year after Wayne and Cynthia Sharpe’s wedding, he encouraged Cynthia to leave her job and work with him at home. Three months later, Wayne was diagnosed with leukemia. He received chemotherapy and fought for six years. Near the end of his fight, Wayne took a call from a good friend who asked, “How will Cynthia be?” Cynthia heard him answer, “She’ll be fine. She’ll be more involved with her Church.”

Cynthia shared, “I have precious memories of him sitting next to me at the Cathedral Basilica of St. Augustine, and can often feel his presence at Mass to this day. Wayne was there when I became a Eucharistic Minister. Now as a lector, I imagine him watching me lovingly.” Wayne was right. Cynthia has become more involved with her parish, and she acknowledged her church family has helped her in her grief. Cynthia said, “God had a plan.”



St. Monica statue at the Cathedral Basilica of St. Augustine.

To honor what she loves most, Cynthia worked with the Catholic Foundation to establish a legacy gift plan in her will which will create the Cathedral Basilica of St. Augustine Beautification Endowment Fund for her parish. Made in loving memory of Rose Turner and Wayne Sharpe, her late mother and husband, the endowment will be funded from the sale of her home. Cynthia also made a gift plan, through a beneficiary designation, in the name of her beloved sister, Marilyn Rose Frankel, who died ten years after Wayne.

Though Cynthia takes great comfort in the planning she has done for the future, she wanted to help her parish now! Cynthia used two years of her IRA's required minimum distributions and gifted a St. Monica statue to the cathedral. Cynthia shared, "I love watching people light candles and offer petitions to St. Augustine's mother - the patron of mothers, wives, widows and difficult marriages."

During their first Mass together at the cathedral, Cynthia said she whispered to Wayne, "This feels like home." He agreed and it became their parish. "I believe Wayne would approve of my plans."



Catholic education is a gift. Catholic schools in the Diocese of St. Augustine have been teaching Gospel values and changing lives for more than 150 years. Our Catholic schools emphasize academic rigor, personal responsibility, service to others and above all – faith in God.

All-Schools Scholarship
 Annunciation Interparish School
 Assumption Catholic School
 Bishop John J. Snyder High School
 Bishop John J. Snyder High School - General
 BJSJ Vallencourt Scholarship
 Louis E. & Genevieve C. Joos Trust
 Mike & Caroline Corrigan/Nu-Trend Giving Fund
 Bishop Kenny High School
 Bishop Kenny High School - General
 Louis E. & Genevieve C. Joos Trust
 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
San Juan del Rio Catholic School *
 St. Elizabeth Ann Seton Catholic School
 St. Francis Catholic Academy
 Kipp W. Kennedy, M.D. Scholarship
St. Francis Student Assistance Fund *
 St. Joseph Academy - St. Augustine
 St. Joseph Catholic School - Jacksonville
 St. Matthew Catholic School
 St. Michael Academy
 St. Michael Academy Don Fuller Scholarship
 St. Michael Academy - General
 St. Patrick Catholic School - Jacksonville
 St. Patrick Interparish School - Gainesville
 St. Paul Catholic School - Jacksonville
 Brizard - Button Family School Support Fund
 Brizard Scholarship
 St. Paul - General
 St. Paul Catholic School - Jacksonville Beach

* **New Endowed Funds** - A very special thank you to our donors who created these new restricted funds.

THE VALLENCOURT SCHOLARSHIP AT BISHOP JOHN J. SNYDER HIGH SCHOOL A Family's Legacy Helps Students in Perpetuity

In 1945, after returning home from the war, Francis "Val" Vallencourt borrowed money from a family member and started what is now known as Vallencourt Construction Company. Val and his wife, Barbara, worked hard. They combined their work ethic and can-do attitude with determination, grit and enthusiasm. Despite their inexperience, they found success and began a company that today employs more than 300 workers.

Their work ethic and values are shared by two more generations of Vallencourts who sit on the board of Vallencourt Construction in Green Cove Springs. Their son said, "We knew they were special, and we knew their work ethic was the means God used to bless them and all of us."

As an extension of their personal friendship with Bishop John J. Snyder, and because they valued the school's Christian values and strong morals, the Vallencourt family generously created a scholarship for students at Bishop John J. Snyder High School. Endowed at the Catholic Foundation, the Francis E. and Barbara Vallencourt Scholarship benefits four Bishop Snyder students annually. The scholarship rewards and highlights hard work. As their son said, "the virtue of hard work is its own reward. We must not lose sight of this simple idea."

The scholarship is the family's way of honoring their mother and father. Although Val and Barbara Vallencourt are gone, the influence of the greatest generation is seen through the Vallencourt family's faith, commitment to hard work, resilience and a culture of giving. Their legacy will continue to thrive in the many Bishop Snyder students who have benefited from their generosity.

Members of the Vallencourt Family attended the Vallencourt Scholarship award ceremony in 2022.



Like the Vallencourt family, you can memorialize a loved one by creating an endowment fund in their name. Their legacy will live forever in the good works made possible by the fund's annual disbursements.

To find out more, contact us at catholicfoundation@dosafl.com.

IMPACT GRANTS

Supporting the parishes, schools and ministries of the Diocese of St. Augustine through grantmaking is central to our mission of building a Christ-centered future for the good works of the Church in North Florida. Thanks to the generosity of our faith-filled donors, the Catholic Foundation awarded \$151,668 to 24 applicants in the Diocese of St. Augustine.

Archives & Records Management Office \$10,000
Catholic Charities Bureau - St. Augustine \$5,015
Christian Formation Office \$2,500
Epiphany Catholic Church \$10,000
Epiphany Catholic School \$8,000
Guardian Catholic School \$9,995
Holy Family Catholic Church - Williston \$9,962
Holy Family Catholic School \$6,000
Office of Youth & Young Adults \$10,000
Our Lady of Good Counsel Catholic Church \$4,200
Queen of Peace Catholic Church \$2,500
San Jose Catholic Church \$2,800
San Juan Mission \$4,000
St. Anastasia Catholic Church \$2,316
St. Augustine Catholic Church & Student Center \$8,500
St. Francis Catholic Academy \$3,655
St. Francis Xavier Catholic Church \$8,000
St. John the Baptist Catholic Church - Crescent City \$8,000
St. John the Evangelist Catholic Church - Chiefland \$10,000
St. Madeleine Sophie Catholic Church \$9,030
St. Monica Catholic Church \$2,000
St. Patrick Catholic Church - Gainesville \$7,100
St. Paul Catholic School - Riverside \$4,595
St. William Catholic Church \$3,500

Katy Lockard, director of Archives for the Diocese of St. Augustine, demonstrates records management to Jacqueline Brown, Ph.D., Catholic Foundation board member. The foundation awarded \$10,000 in grant funding to professionally restore, preserve and archive over 200 architectural drawings of diocesan properties.



The diocesan Office of Youth and Young Adults sponsored Urban Plunge – a summer youth program where volunteers paint houses, build wheelchair ramps and complete various other home rehab projects for the elderly and low-income persons.



Just so, your light must shine before others, that they may see your good deeds and glorify your heavenly Father. Matthew 5:16

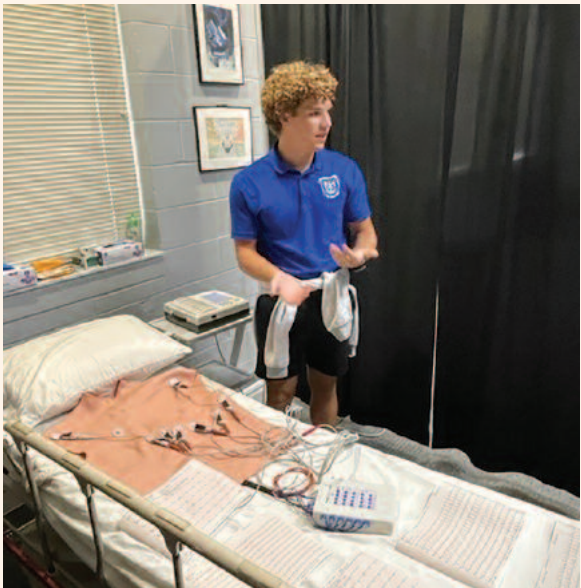
IMPACT GRANTS

Lori Adelfio creates content for St. Anastasia Catholic Church, which was awarded \$2,316 for digital media improvements.

Father Tim Lindenfelser said, "The coronavirus pandemic demonstrated the need for the ecclesial community to use all means available to spread the faith and strengthen the bonds of communion between individuals and groups."



St. Francis Academy received a grant for their Health Sciences Institute program. After receiving training on the dangers of vaping and tobacco use, SFA students give presentations at local middle schools about lung and heart health. Principal Jason Acosta said, "Being able to visit our partner schools and provide these lessons allows us to demonstrate our community outreach and quality education in the partner schools, while also providing our students a glimpse into a course of study to pursue."



Sara Ragan teaches children about Jesus using the Montessori method through a training program called "Catechesis of the Good Shepherd." Father Lawrence Peck, pastor of St. Patrick Catholic Church in Gainesville, said about the program, "the results have been spectacular, and we hope to grow it. It will greatly impact the faith of our young families."



Gifts made to the unrestricted fund of the endowment supports the Grants Program. We offer special thanks to the Brizard Family and the Diocese of St. Augustine.

To find out more about how you can be a part of future grants, please contact us at catholicfoundation@dos afl.com or call 904-262-3200.

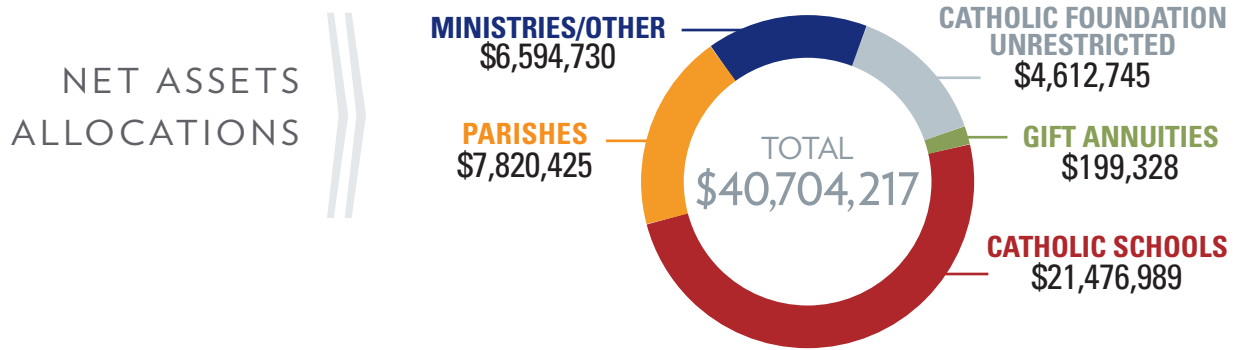
CATHOLIC RESPONSIBLE INVESTING

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.

The foundation adheres to the investment guidelines of the United States Conference 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, visit cf.dosafl.com/about-us/#responsible-investing



NET ASSETS BY FISCAL YEAR

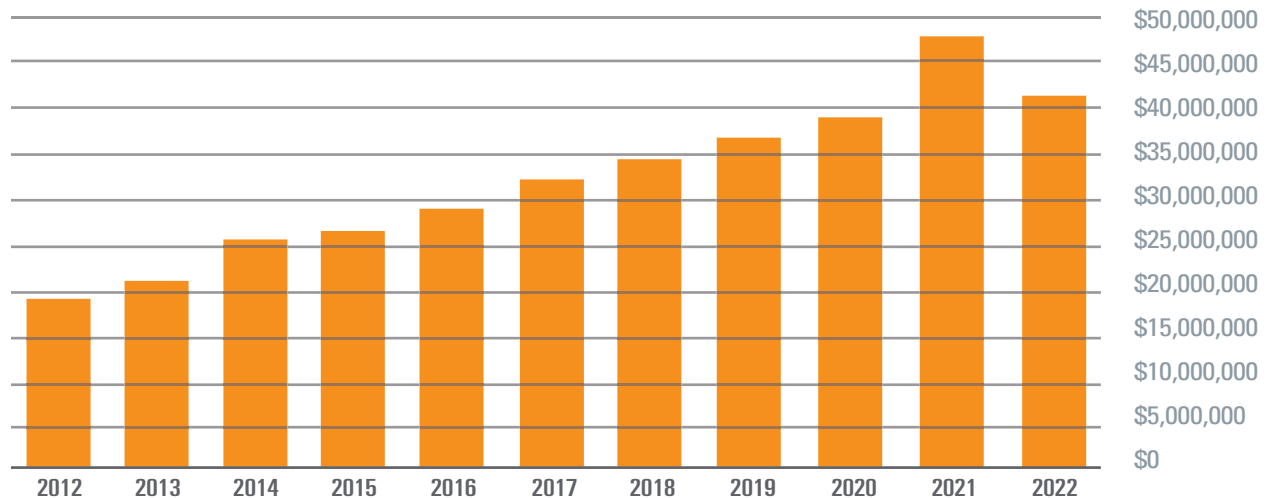




Photo by St. Augustine Catholic Magazine/SCOTT SMITH



Photo by St. Augustine Catholic Magazine/WOODY HUBAND

STATEMENT OF ACTIVITIES AND CHANGES IN NET ASSETS | AS OF JUNE 30, 2022 AND 2021

REVENUE, GAINS, (LOSSES) AND OTHER SUPPORT	21-22 Data	20-21 Data
Contributions	\$369,836	\$566,054
Investment income	\$1,002,274	\$510,316
Market gains (and losses) (realized and unrealized)	(\$5,495,751)	\$8,580,888
Annuities, net of contributions	(\$252,841)	\$315,728
Actuarial gain on annuities	\$18,464	\$3,649
Total revenue, gains, (losses) and other support	(\$4,358,018)	\$9,976,635

PROGRAM SERVICES AND OPERATING EXPENSES

Fund disbursements (restricted)	\$1,414,553	\$1,361,831
Grants	\$149,668	\$136,728
Annuitant payments	\$99,985	\$83,244
Operating expenses	\$391,497	\$265,598
Total program services and operating expenses	\$2,055,703	\$1,847,401
Changes in net assets	(\$6,413,721)	\$8,129,234

NET ASSETS

Beginning of year	\$47,117,938	\$38,988,704
End of year	\$40,704,217	\$47,117,938

Notes:

Certain reclassifications have been made to the 2020-2021 financial data to conform to the 2021-2022 presentation of financial data. Total net assets and changes in net assets are unchanged due to these reclassifications.

2021-2022 disbursements and grants totals reflect returned funds.

For a copy of the independent auditor's report for the Catholic Foundation's fiscal year ending June 30, 2022, 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.

ORDER OF AUGUSTIN VÉROT **LEGACY MEMBERS**

The Catholic Foundation is grateful for these generous and faith-filled donors who have made gift plans to benefit the parishes, Catholic schools and ministries of our beloved church.

If you have made a plan in your will to benefit our Church, and you have not previously notified the Catholic Foundation, we encourage you to do so. We will work with you to ensure your gift has the impact you desire.

Dr. Maria Acosta-Rua
Ms. Judith Adkins
Ms. Rosemary Aeschbach†
Mrs. Lillian Alcorn†
Mark† and Rita Allen
Mr. and Mrs. John Anderson
Anonymous Donor
Elmer Aponte
Dennis M. and Mary H. Axman
Joyce A. Aycock† in memory of
Ernest E. Anders♥
Mrs. Inez Ayres†
Mr. and Mrs. Charles Baer
Ms. Kathleen Bagg
Maximo & Sylvia Balbarez
Donald Ballish
Mrs. Elizabeth Banner†
Mr. and Mrs. Edward Barbarito
Martha Barrett
Mr. Raymond Basso†
George† and Doris Baumgartner
Agatha Anne Baur
Mrs. Karen Begin†
Marilyn & Anthony Belo
Mr. Frank Benischeck
Mr. Robert† and Mrs. Virginia† Bentley
Mrs. Lisa Benton
MG Paul and Janet Bergson
Leo† and Marthann† Blatz
Msgr. 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 in Memory of
America Jean Morris Cadow♥
Mrs. Gertrude Cameron†
Juanita R. Campbell
Mr. and Mrs. Michael Cascone, Jr.
Mr. Arthur Catotti†
William P. Cervone
Mr.† and Mrs.† Victor Chew
Mr. and Mrs. Thomas Claridge

Rev. Peter Colasurdo
Mr. Jack Collins† and Mrs. Pris† Collins Klimchak
Mrs. Jacqueline Comstock
Mr. James† and Mrs. Helen† Courduff
Mr. and Mrs. Tommy Crowder
Mrs. Marlise Cusick
Mr.† and Mrs. Eugene Dagg
Msgr. Mortimer Danaher†
Mr. William† and Mrs. Viola† Dando
Concetta DeLisi
Mrs. Betty Demetree
Michael and Barbara† Denison
Mr. and Mrs. Louis DePetris
George and Pam Dewey
Mr. Cosmo DiPerna
Mrs. Patricia K. DiSandro
Teresita C. Dominguez
Mr. and Mrs. David Donaldson
Mr. Clement† and Mrs. Marian† Dowling
Margaret & Clark Druessedow
Dr. Nancy G. Dvorak†
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
Most Rev. Felipe J. Estévez
Cliff and Debbie Evans
Lee M. and Nancy S. Evans
Shirley Evans in Memory of
B.N. "Doc" Evans♥
Mrs. Doris Faustini
Ms. Alice Ferrari
Mrs. Shirley Fewox
Beverly and Michael Flanagan
Edward James Fleming, Jr. &
Debora Ann Fleming
Mrs. Beatrice Flynn†
Mrs. Judith Franklin
Mrs. Gail Gaines
Ms. Mary Gallagher
Ron and M.J. Ginder

Mrs. Carole Ginzl
Mr. Eugene† and Mrs. Gay† Gionta
Mrs. Joan Giordano
John M. Giorgianni and
Dr. Angela S. Martin
Mr. and Mrs. John Gribbin
Mr. Herbert Hakenewerth†
Deacon and Mrs. Larry Hart
Rev. Francis Haryasz†
Msgr. Vincent Haut
Mr. and Mrs. John Hay
Ms. Joanne Hayes
Mr. and Mrs. Kurt Hearth
Mrs. Margaret Helow
Msgr. James Heslin†
Rev. William A. Hochheim, III†
Rev. Robert Hoffman
Mr. and Mrs. Donald Hollingsworth
Msgr. Michael Houle, EV
Dr. Mary Hughes†
Ms. Barbara Jackson
Mr. Lawrence† and Mrs. Kathy† Jones
Mr. and Mrs. William Joos
Hobart Joost, Jr.
Mrs. Eailene Karr†
Robert W. and Cynthia Kastner
Paul and Kathy Kerins
Henry R. Kiechler†
Ms. Karen King
Ronald Klinsic in Memory of
Elizabeth Joan Klinsic♥
Mr. and Mrs. James Knutzen
Msgr. Eugene C. Kohls, J.C.D.
Mr. and Mrs. Henry Kuhnert
Janet LaFrance
Douglas & Margarete Laidlaw in
Memory of Nick & Sibylla Kulogo♥
Mrs. Betty Lawson†
Michele Leahy In Memory of Mary B. Leahy♥
Mrs. Dorothy Legere†
Ms. Mary L'esperance
David† and Rose-Marie† Lewis
Mrs. Najwa Liscombe in Memory of Stan Liscombe♥

Mrs. Julia M. Little†
 Ms. Audrey Loos
 John† and Katherine† T. Lowe
 Charitable Remainder Trust
 Joanne Mackey
 Mr. and Mrs. Michael Maguire
 Michael A. Marconi
 Alfred J. Martin
 Marshall† and Patty† Martinez
 James and Joanne Marx
 Mr.† and Mrs. John H. McCormack, Jr.
 Sister Louise Thayer McEachern
 Dr. Terence and Mrs. Erin McGee
 Thomas McKenzie and
 Jean Uhrig McKenzie Fund
 John and Ana McLaughlin
 Mr. and Mrs. William B. McMenemy
 Michael J. and Carol A. McNamara
 Mr.† and Mrs.† Patrick C. Medlar
 Mrs. Gloria Mendez
 Ms. Gail Middleton
 Mrs. Teresa Milam†
 Mr. and Mrs. Richard Miller
 James T. Monahan, III
 Mrs. Mary Monfort in Memory of
 Victor Monfort♥
 Mr. and Mrs. Ricardo Morales
 Elizabeth B. Moore†
 Mr. and Mrs. John Morrissey
 Mr. and Mrs. Philip J. Moses, Jr.
 Michael and Faith Murray
 Mr. and Mrs. Ronald Natale
 CH (Maj.) James O'Neal
 Ms. Mollie O'Neill
 Mr.† and Mrs. Ramzi Ossi
 Mr.† and Mrs.† V.E. Palmer
 Father Fred Parke†
 Mr. Harry Pawlik†
 Mr. Richard† and Mrs. Jean† Paynter
 Rev. Lawrence Peck
 I.G. "Pete"† and Saralee† Peters
 Elizabeth H. Phelps
 Mr. and Mrs. John Pinson
 Mr. and Mrs. Thomas Place
 Ms. Denis Plumb
 Ms. Nancy Powers
 Mr. and Mrs. Warren Powers
 Ms. Lucina Presbitero†
 Mrs. Irene Puleo
 Michael P. and Teresa A. Radzinski
 Mrs. Victoria Reigel
 Mr. and Mrs. Ramon Reyes
 Charles† and Dianne Rice
 Ms. Patricia Robinson
 Kevin M. and Elizabeth G. Ruane
 Mr. and Mrs. Tancredi Rucci
 Mr. and Mrs. Patrick Russell
 Ms. Mary Ryan
 Gerald R. Schmidt
 Francis "Dutch"† and Barbara Scholtz

Mr. Jerome J. Seefried†
 Cynthia Sharpe, in loving memory
 of Rose Turner and Wayne Sharpe♥
 Mr.† and Mrs.† Robert T. Shircliff
 Mr. George Shurick†
 Mrs. Alicia Sierra-Reyes
 Ms. Marjorie Simpson†
 Ms. Gayle Smith
 Mrs. Julie Snow
 Most Rev. John J. Snyder†
 Mr. and Mrs. Philip Sotomayor
 Ms. Victoria Stacy
 Mrs. Lula Stewart†
 Terry and Nancy Sullivan
 Jerome R. and Lois H. Swietnicki
 Mr. Edward† and Mrs. Mary† Taylor
 Mr.† and Mrs. Glynn Thomas
 Ms. Patricia Thomas†
 Ken and Cindy Thompson
 William† and Patricia Tierney
 Mary T. Tilger
 Father Philip Timlin
 Mr. Roger and Mrs. Carol Tompkins
 Jerry Veierstahler
 Mr. and Mrs. Carlos Vides
 Mr. and Mrs. Andy Wade
 Eva D. Walker in Memory
 of Dale G. Walker♥
 Mr. John Walsh
 Mr. and Mrs. Louis Walsh
 Mr. and Mrs. Gerald Weedon
 Mr. Harvey Weinschenker†
 Sandy Wentworth
 Mr. and Mrs. Harold Westover
 Mrs. Mari White
 Mrs. Rose White
 Jerome and Christie Wilamowski
 Deacon David and Karen Williams Family
 Mrs. Rosita Williams
 Very Rev. Thomas S. Willis
 Mr. and Mrs. Fred Wiseman
 M. Elaine Zurek and
 Timothy T. Wojciechowski
 Judy A. Wolford
 Mr. and Mrs. Alton Yates
 Mrs. Francis E. Young†
 Katharine K. Zambetti
 Rev. Steven Zehler

♥ **A gift plan which memorializes a loved one is a beautiful way to unite what you love – in perpetuity.**

† **Join us in remembering those who generously supported their parishes, Catholic schools and ministries of the Diocese of St. Augustine. Eternal rest grant unto them, O Lord, and let perpetual light shine upon them.**

“SUCCESS IS EMPTY if there is no meaning beyond ourselves.”

Mike and Barbara Denison know they have lived fortunate lives. They wanted to “leave things better than we found them. We want to do something beyond ourselves, paying it forward out of gratitude.”

Mike and Barbara benefited greatly from their educations and wanted to help others gain the advantages of a quality education as well. They designed estate gift plans for the benefit of two schools – I.U. Southeast (IUS), Mike’s alma mater, and Guardian Catholic School in Jacksonville.



Mike attended a public high school after previously attending Catholic school. “There was no comparison when I look back. The values and quality of education in Catholic schools was far superior.” The Denisons decided to support Guardian Catholic School’s endowment fund at the Catholic Foundation because they knew it would change lives. Many Guardian students come from challenging backgrounds and need tuition assistance to obtain a quality Catholic education. Making their gift through the endowed fund benefiting Guardian ensures it will help needy students far into the future, as their initial gift continues to grow and produce funds annually.

“We don’t have children of our own, so it’s even more important for us to leave something behind to benefit someone else going forward,” Mike said. “Barbara and I are humbled to be able to create this legacy gift plan. This has brought us so much joy!” Not wanting recognition for themselves, Mike and Barbara hope their story might encourage others. “Even one more couple creating their own plan would make it worth sharing our story. Success is empty if there is no meaning beyond ourselves.”

Since writing this story, Mike’s dear wife of twenty-seven years, Barbara, recently passed away. He felt even more certain their story should be shared in Barbara’s memory.

FISCAL YEAR 2021-2022

CATHOLIC FOUNDATION BOARD OF DIRECTORS

Most Rev. Felipe J. Estévez, S.T.D.

President
Bishop Emeritus of St. Augustine

Mr. Kenneth R. Thompson, Jr., CTFA

Chair
Holy Family – Jacksonville

Mrs. Jane R. Lanier, CFRE

Vice-Chair
Development & Planned Giving Committee
Finance Committee
St. Matthew

Rev. Msgr. Michael R. Houle, E.V.

Treasurer
Episcopal Vicar for Development & Finance

Mr. Michael I. Maguire, CFP

Secretary
Finance Committee
Assumption

Mr. William B. McMenemy, J.D.

Immediate Past Chair
Development & Planned Giving Committee
Finance Committee
St. Paul – Jacksonville Beach

Mr. Dennis M. Axman, CLU, ChFC, AEP, CFP, RICP

Chair, Development & Planned Giving Committee
St. Catherine of Siena

Ms. Martha Barrett

Grants Review Committee
Assumption

Mrs. Marilyn C. Belo, J.D., LL.M.

Development & Planned Giving Committee
Queen of Peace

Rev. Msgr. Keith Brennan, J.C.D.

Vicar General

Mrs. Jaqueline Brown, PhD

Grants Review Committee
San Juan del Rio

Mr. Juan Chaluja

Development Committee
Our Lady Star of the Sea

Mr. John Delaney, J.D.

Finance Committee
St. Paul – Jacksonville Beach

Deacon Michael Elison

Chancellor

Mrs. Debbie English

Grants Review Committee
St. John Paul II

Mrs. Beverly Flanagan, CFP

Chair, Grants Review Committee
St. John the Baptist - Jacksonville

Capt. William C. McCamy, USN, Ret.†

Grants Review Committee
St. Catherine of Siena

Mr. John McLaughlin, IV

Development & Planned Giving Committee
Finance Committee
Our Lady Star of the Sea

Mr. Philip J. Moses, Jr., CPA, PFS

Chair, Finance Committee
Epiphany

Mrs. Teresita 'Tessie' Rosario, RN, MS

Development & Planned Giving Committee
St. Catherine of Siena

Mr. Sidney S. Simmons, II, J.D.

Grants Review Committee
St. Paul - Jacksonville

EX OFFICIO MEMBERS:

Mrs. Patricia K. DiSandro

Executive Director

Mr. Stephen R. Bell, CPA, CGMA

Chief Financial Officer,
Diocese of St. Augustine

Mr. Timothy D. Cebulko, CFA, CFP

Financial Advisor

† Captain McCamy passed away on January 28, 2022. We're grateful for his service to our church, our community, and our country. His selflessness and generosity will be remembered always.

PLANNED GIVING ADVISORY COMMITTEE

Mr. John K. Anderson, Jr.

Anderson Financial Partners
Managing Partner

Mr. David M. Baker, CFP

Merrill Lynch
Senior VP Wealth Management Advisor

Mr. Jeffrey E. Bernardo, CFA

Augustine Asset Management
President & CEO, Portfolio Manager

Mr. Richard Brock, CPA

Brock Advisory
Principal

Mr. Gregory M. Estes, CFA

Augustine Asset Management
Vice President & CCO, Portfolio Manager

Mr. James Heinz, CPA/PFS, J.D.

Private Client Tax Services Heinz Jolles & Berry
Managing Partner

Mr. James Knutzen

James Knutzen & Associates CPA, (Retired)

Mr. Patrick Macabasco

Ameris Bank
Vice President Wealth Advisor

Mr. William B. McMenemy, J.D.

Donahoo & McMenemy, PA
Shareholder

Mr. Kenneth R. Thompson, Jr., CTFA

Cypress Bank and Trust
Senior Trust Executive

Mr. Andrew M. Woods

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

BISHOP JOHN J. SNYDER LEGACY **LEADERSHIP AWARD**

Bishop Snyder, the 8th bishop of the Diocese of St. Augustine, was passionate about the development and utilization of gifts by the entire people of God.

This Award Honors

- those who have left a lasting impact on our Church through their support of the Catholic Foundation.
- those who exemplify the personal qualities Bishop Snyder lived by: compassion, tolerance, peace and the love of Christ.

In 2022, two deserving awardees were named. The Catholic Foundation is honored to bear witness to the foundational work of Msgr. Eugene C. Kohls and Mr. William J. “Bill” Joos.

Msgr. Eugene C. Kohls was presented the award by Bishop Estévez and Patty DiSandro, Catholic Foundation executive director, at the foundation’s annual luncheon on April 26, 2022. A signer of the original Articles of Incorporation, Msgr. Kohls was an advocate for the Catholic Foundation from the very beginning. His service during the early years resulted in a foundation firmly built on sound fiscal policies and practices. Msgr. Kohls designated his \$1,000 awardee tribute gift to the Msgr. Eugene C. Kohls Priests’ Retirement Fund, which will be endowed with his future estate gift.



Photo by St. Augustine Catholic Magazine/FRAN RUCHALSKI



William J. “Bill” Joos was the co-awardee in 2022. As an attorney, Bill advised the diocese when the foundation was first established. In addition to offering legal advice to the foundation, Bill generously supported the Louis E. and Genevieve C. Joos Trust Endowment Fund, named for his parents. This fund provides perpetual support to the Vocations Office, Bishop Kenny High School and Bishop John J. Snyder High School. During his legal career, Bill facilitated large gifts to the Catholic Foundation’s endowment. His counsel to the Brizard/Button families resulted in the creation of two endowment funds benefiting St. Paul Catholic School in Jacksonville and a large gift which benefited the unrestricted fund of the Catholic Foundation. Bill designated his \$1,000 honorary gift to the Bishop Kenny High School Endowment Fund.

P R E V I O U S A W A R D E E S

2020 Ricardo “Dick” Morales, Jr. | 2019 Msgr. Vincent Haut | 2018 Francis “Dutch” Norman Scholtz | 2017 Robert T. Shircliff

CATHOLIC
FOUNDATION
STAFF

Patricia K. DiSandro
Executive Director
pdisandro@dosafll.com
904-208-6927

Kelly C. Wood
Charitable Gift Advisor
kwood@dosafll.com
904-208-6931

Kim Howard
Program Administrator
khoward@dosafll.com
904-208-6928

Janice Timm
Administrative Assistant
jtimm@dosafll.com
904-208-6978

11625 Old St. Augustine Road
Jacksonville, FL 32258

Catholic Foundation
DIOCESE OF ST. AUGUSTINE 

904-262-3200
cf.dosafll.com