

The Catholic Coundation of the DIOCESE of SACRAMENTO, INC.

Mission

To witness to Christ and His Gospel values of love, justice, forgiveness and service to all by ensuring that financial donors can effectively support the wellbeing of Catholic works in our diocese.

Vision

To serve as a

FORWARD-THINKING CATALYST in the shaping of effective and appropriate responses to challenges and opportunities.

ENTRUSTED & EXPERIENCED CENTRAL ADMINISTRATOR for the disbursement of funds from donors of varied ministerial interests and abilities to give.

DEDICATED COMMUNITY PARTNER in fostering and providing financial support for religious, educational and social ministries.

HIGHLY VISIBLE RESOURCE for the preservation of the Gospel values of love, justice, forgiveness, and service to all.

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from the Bishop



BISHOP JAIME SOTO

Since my arrival in Sacramento, I have met with thousands of faith-filled people throughout our Diocese. It is gratifying to witness the generous commitment to the parishes, schools, and other ministries that serve the people of God in the 20 counties of the Diocese of Sacramento.  $\sim$  It is this same commitment that was the inspiration for the founding of The Catholic Foundation of the Diocese of Sacramento. Thanks to the vision of Bishop William Weigand, The Catholic Foundation was established in 2004 with a mission to witness the gospel values of love, justice and service to all by ensuring that financial donors can effectively support the well-being of Catholic works in our diocese.  $\sim$ Similarly, The Manogue Perpetual Endowment Foundation was established in 2002 with the impetus to support the good work of the parishes and parish schools in our diocese.  $\sim$  Over time, it became apparent that merging these two foundations was the right thing to do. On January 1, 2010, The Manogue Perpetual

Endowment Foundation was merged into the The Catholic Foundation. There are two primary reasons for this merger. One is to exercise responsible stewardship by streamlining the financial structure and realize greater efficiencies in financial reporting. The second reason is that parishes with endowments will be able to take advantage of the marketing, promotional support and professional resources provided by The Catholic Foundation.  $\sim$  I am grateful to everyone who has participated in The Catholic Foundation and The Manogue Perpetual Endowment Foundation over the years; including our donors, board of directors, parish and school staff and volunteers as well as the professional staff and advisors. Their generosity and commitment will sustain and foster a broad range of essential ministries that will benefit our faith community for generations to come.  $\sim$  I invite you to learn more about The Catholic Foundation and how we can be of service to you.



from the President



LAWRENCE B. GARCIA

It is my pleasure to serve as your President of The Catholic Foundation of the Diocese of Sacramento. The Catholic Foundation belongs to you —

the donors, parishes, schools and agencies within our diocese. The reason for The Catholic Foundation and its endowments is to support the Bishop and help the local churches carry out their mission and many ministries. I am pleased to report that The Catholic Foundation enjoyed a very productive year both in terms of return on our investments as well as the expansion of our services to support the parishes,

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schools and agencies of the diocese. I'm also pleased to share with you a few of the primary areas of progress we have experienced in the past year.  $\sim$ 

2009 Areas of Progress

Between January 1 and December 31,2009, our investment earnings grew by more than twenty percent (23%). To be sure, this was a welcome increase following the decline in earnings that were experienced by The Catholic Foundation in 2008.

 $\sim$ 

The Manogue Perpetual Endowment Foundation was merged into The Catholic Foundation creating a much larger and more robust organization. We look forward to serving the additional 74 endowment account holders representing more than \$21 million in endowment assets. We are confident that our parishes and schools will experience greater accountability and communications through enhanced marketing, reporting and support of their local endowment efforts.

A comprehensive parish-based stewardship program, *Stewardship*, *A Way of Living*, was developed and provided to all parishes diocesanwide.

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The Catholic Foundation's new website, www.tcfsac.org, went live in 2009 and contains extensive resources for our parishes, schools and agencies.

Lamence B. jarcía

Lawrence B. Gardia President, Board of Directors

All of us involved with The Catholic Foundation — the board of directors. committees, staff and advisors — strive to be good stewards of everything God has given us. Be assured that we at The Catholic Foundation take the leadership role entrusted to us as stewards of these important resources very seriously. We are grateful for your trust and support and look forward to continuing to serve you in the future.

Youth Advancement

# SUCCEED ENDOWMENT FUND

 $\sim$  Sacramento Urban Catholic Children's Equal Education Development



stablished in 1985, SUCCEED set out to build a reliable source of funds to provide ongoing needs-based tuition assistance to students of families who could not afford a Catholic education. Twenty-four years later, thanks to the many benefactors and volunteers who supported SUCCEED, primarily through the Annual Gala Dinner, the gift of a Catholic education has been made possible for hundreds of our local youth whose families experience hardships. Today, the SUCCEED endowment in The Catholic Foundation totals more than \$5 million — generating approximately \$250,000



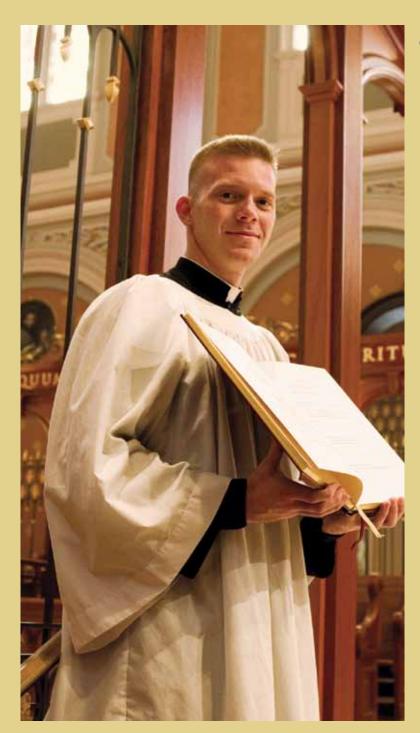
in annual interest earnings to support the three SUCCEED Schools (St. Patrick, Holy Cross and St. Joseph), ensuring the enduring legacy of quality Catholic education remains accessible to Catholic families.

The communities of the Diocese of Sacramento have said there is no single endeavor more important than the formation of our youth. Through the Catholic Foundation, donors can help ensure that our youth have the opportunity to develop as responsible, caring Christians.

Encouraging Vocations

## SEMINARIAN EDUCATION ENDOWMENT

 $\sim$  Funded by the Preserving Our Past, Building Our Future Campaign



ichael Ritter grew up in SS. Peter and Paul Parish in Rocklin where he experienced a variety of pastoral ministries and recalls the example of goodness and generosity that he found in his parish pastor. Now a student at St. Patrick's Seminary in Menlo Park, Michael is beginning his third year in theology. As he learns what it means to be a priest for and with the people of the Diocese of Sacramento, he is grateful for the resources and support he receives as he continues his path of personal and spiritual formation. The Seminarian Endowment Fund helps train new priests to serve our communities in the



The process of choosing to dedicate one's life to the Church is filled with discernment. Through the Foundation, donors can assure the preservation of a supportive community of financial security for those who become ordained or consecrated servants of Christ's Church.

future while also relieving them from the anxiety of financial burdens so they can focus on their spiritual formation.

Serving People in Reed

# SOCIAL SERVICES ENDOWMENT

 $\sim$  Funded by the Preserving Our Past, Building Our Future Campaign

he Social Services Endowment serves as an ongoing testament of our faith by providing needed funds to Catholic Social Service programs, thereby assisting our brothers and sisters desperately in need. Michael and Irene, for example, were helped by Catholic Social Service of Solano County. Both are grateful for the compassion and assistance that helped them overcome difficult circumstances.

Michael lost everything when his low-income residence burned to the ground. Yet his spirit never dampened. Because help was there when he needed it most, Michael is now recovering from his great loss and still lives on his own.

Irene is determined to get her life back on track after years of domestic abuse. With the help and encouragement she received, she looks forward to a hopeful future for herself and her son.



Our basic Catholic teaching says "the Eucharist commits us to the poor." There will always be disadvantaged people in our midst. The Catholic Foundation provides practical ways for donors to provide the deciding difference in people's lives.



foundation Bistory



BISHOP PATRICK MANOGUE

The Diocese of Sacramento has been blessed with a rich tradition of faith and generosity that dates back 160 years to the first Mass celebrated in Sacramento

by a Dominican missionary priest in 1850. In 1857, The Sisters of Mercy established the first Catholic hospital in Northern California. In the same year, the sisters opened an elementary school for 115 children. ~ Over the years, thousands of clergy, religious and laity have responded to the Lord's call to build our Church into what it is today - encompassing 42,000 square miles, serving more than 900,000Catholics through our 104 parishes, 44

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Catholic elementary and high schools and more than 100 social service ministries.  $\sim$  This rich history of faith and generosity of those who have gone before



us created these many wonderful Catholic institutions with the common desire of sharing Catholic life and giving witness to our Catholic faith in the broader community.  $\sim$  It is this same common desire which was the impetus for establishing The Catholic Foundation with the mission to "witness to Christ and His Gospel values of love, justice, forgiveness and service to all by ensuring the financial well-being of the Catholic works in our diocese."

Cathedral of the Blessed Sacrament, 1899

As Bishop Patrick Manogue was committed to the building up of the Church in The Diocese of Sacramento, The Catholic Foundation is committed to the growth and preservation of our common ideals of generosity and charity for generations to come.



Encouraging Vocations

PRESERVING OUR PAST, BUILDING OUR FUTURE SCHOLARSHIP ENDOWMENT FOR SEMINARIAN EDUCATION - See featured story, page 4

BISHOP WILLIAM K. WEIGAND SEMINARIAN ENDOWMENT – Established in 2007 by Bishop William K. Weigand, this endowment helps fund the education and formation of future priests for the Diocese of Sacramento.

MARY LUDDY SEMINARIAN EDUCATION ENDOWMENT – Provides for the education of young men for the priesthood of the Roman Catholic Church of the Diocese of Sacramento.

HELEN R. HOGAN PERPETUAL ENDOWMENT FOR SEMINARIANS – Provides funding for the education of seminarians for the Catholic Diocese of Sacramento.

FRED W. LAMMERDING ENDOWMENT FUND FOR VOCATIONAL DEVELOPMENT – Once the fund reaches \$500,000, proceeds from this endowment are to be used to reach-out and ask young people to consider a vocation to the priesthood and religious life.

Jerving People in Reed

PRESERVING OUR PAST, BUILDING OUR FUTURE SOCIAL SERVICES ENDOWMENT - See featured story, page 5

POVERELLO ENDOWMENT FUND – Proceeds from this fund are to be used to support the human social service ministries of St. Francis of Assisi Parish in Sacramento, as well as the greater Diocese of Sacramento.

THE MEUSER FAMILY DONOR ADVISED FUND – Established by the Tom and Jane Meuser family to support the mission and teachings of the Roman Catholic Church in the Diocese of Sacramento.

Youth Advancement

PRESERVING OUR PAST, BUILDING OUR FUTURE SCHOLARSHIP ENDOWMENT FOR CATHOLIC SCHOOLS – Funded by the Preserving Our Past, Building Our Future Campaign, this endowment provides needs-based tuition assistance for families sending their children to Catholic elementary and Catholic High Schools in the Diocese of Sacramento.

PRESERVING OUR PAST, BUILDING OUR FUTURE SCHOLARSHIP ENDOWMENT FOR RELIGIOUS EDUCATION AND LAY MINISTRY - Funded by the Preserving Our Past, Building Our Future Campaign, this endowment provides scholarships for the formation of parish Coordinators and Directors of Religious Education, RCIA, Youth Ministry and Religious Instruction.

## A.G KASSIS FAMILY SCHOLARSHIP

ENDOWMENT FOR HIGH SCHOOLS – Established in 1955 by members of The A.G. Kassis Family to provide scholarship support for needy families who wish to send their children to a Catholic High School in the Diocese of Sacramento.

## Believe/Catholic Schools Scholarship

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ENDOWMENT – Provides needs-based tuition assistance for families seeking a Catholic elementary education for their children. Recipients are to attend a school other than a SUCCEED school.

### Everett V. O'Rourke Scholarship

ENDOWMENT – Established in 1987, the endowment provides scholarship support to students who have graduated from a Catholic elementary school and wish to attend a Catholic High School in the Diocese of Sacramento.

#### MAURICE S. DIXON MEMORIAL

SCHOLARSHIP ENDOWMENT – Provides needsbased tuition assistance to families from culturally or financially under-privileged neighborhoods or communities who seek a Catholic education at one of the SUCCEED schools.

#### SUCCEED ENDOWMENT FUND

- See featured story, page 3

## RICHARD AND ANTOINETTE D. VLIET

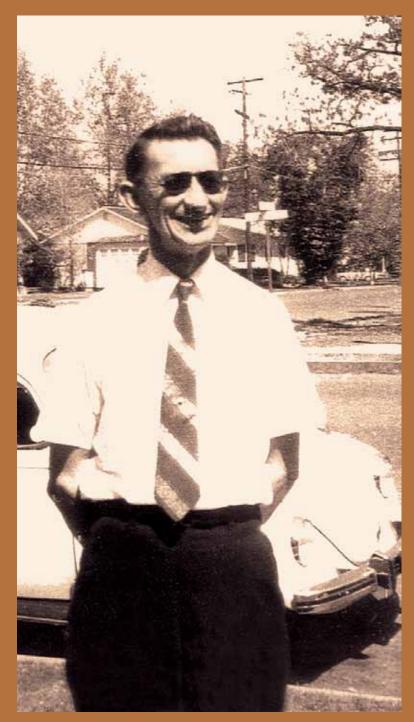
SCHOLARSHIP ENDOWMENT – Provides annual scholarships to worthy Catholic students in the greater Sacramento area to attend a college they would otherwise be unable to attend due to financial predicament.

Living the Catholic Gaith

# JOHN ROBERT KEANE MEMORIAL SCHOLARSHIP ENDOWMENT $\sim$ Sacred Heart Elementary School and Mercy High School, Red Bluff

he Keane family believes that contributing positively in some way is a rewarding experience — an important way to give back to the community. For this reason they created a memorial scholarship endowment in loving memory of Mr. John Robert Keane who was a positive influence on so many people, and a strong advocate for Catholic education in Red Bluff. John Robert Keane and his wife Gerry raised seven children, all of whom attended and graduated from Sacred Heart Parochial School, its predecessor, Mercy Academy, and Mercy High School. The Keane family legacy continues with three grandchildren attending parochial schools in Red Bluff, and other schools throughout the Diocese. Sadly, Mr. Keane passed away in 1996. In 1998 Rosalie Escobar, John's mother-in-law, made a provision in her estate plan to honor John Robert by establishing the John Robert Keane Memorial Scholarship Endowment.

> Thanks to the generosity of the Keane Endowment, several families from Sacred Heart Parish, Red Bluff, have received tuition assistance grants making Catholic education a reality for their children.



Junds & Endowments

Merged from The Manogue Perpetual Endowment Foundation January 1, 2010 | \$21,615,000

### PARISH ENDOWMENTS

Fr. Michael J. Dillon Scholarship Endowment, Rocklin

Garland and Veronica Frizzie Endowment, St. Joseph, Sacramento

Holy Family Parish Religious Vocations Endowment, Citrus Heights

Immaculate Conception Parish Education Endowment, Sacramento

Lambert-Richard Endowment, St. John the Baptist, Chico

Marya Welch Memorial Hall Endowment, St. James, Davis

Sacred Heart Parish Endowment, Red Bluff

St. Francis of Assisi Parish Endowment, Sacramento

St. James Parish Endowment, Davis

St. Joseph Parish Endowment, Elk Grove

St. Joseph Cemetery Endowment, Redding

St. Patrick's Cemetery Endowment, Placerville

St. Rose Parish Education Endowment, Roseville

St. Therese Parish Endowment, Isleton

St. Thomas More Catholic Education Endowment, Paradise

St. Vincent Ferrer Parish Endowment, Vallejo

William J. and Marijane E. Adams, Jr. Endowment for Queen of the Snows Mission, Tahoe City

#### PARISH-SCHOOL ENDOWMENTS

All Hallows School Endowment, Sacramento

Apostles of the Sacred Heart of Jesus Scholarship Endowment, St. Charles Borromeo School, Sacramento

Burleigh Scholarship Endowment, St. Thomas More, Paradise

Charlotte Mae Church Memorial Scholarship Endowment, St. Robert School, Sacramento

Edward J. and Vera A. Langen Scholarship Endowment, Notre Dame School, Chico

Elizabeth, Matthew and Michael Hansen Tuition Assistance Endowment, Holy Rosary School, Woodland

Holy Cross School Endowment, West Sacramento

Holy Family School Endowment, Citrus Heights

Holy Rosary School Endowment, Woodland

Holy Spirit School Endowment, Fairfield

Holy Spirit School Endowment, Sacramento

John Robert Keane Memorial Scholarship Endowment, Sacred Heart School and Mercy High School, Red Bluff

John J. Looser Scholarship Endowment, Mt. St. Mary School, Grass Valley

Merle A. Webb Endowment, Notre Dame School, Chico

Mary Van Geffen Scholarship Endowment, Notre Dame School, Marysville

Nancy E. Murray-Waechtler Scholarship Endowment, St. Thomas, Oroville

Mt. St. Mary School Scholarship Endowment, Grass Valley Mt. St. Mary School Endowment, Grass Valley Mt. St. Mary School Single Parent/Scholarship Endowment, Grass Valley

Notre Dame School Endowment, Chico

Notre Dame School Endowment, Marysville

Notre Dame School Endowment, Vacaville

Our Lady of the Assumption School Endowment, Carmichael

Our Lady of Lourdes School Endowment, Colusa

Presentation School Endowment, Sacramento

Richard & Nancy Quinn Scholarship Endowment for Notre Dame School,Vacaville

Ring Scholarship Endowment, Sacred Heart School, Sacramento

Siddhartha Timothy Grover Memorial Scholarship Endowment, St. John Notre Dame School, Folsom

Sacred Heart School Endowment, Red Bluff

Sacred Heart School Endowment, Sacramento

St. Anne School Endowment, Sacramento

St. Basil School Endowment, Vallejo

St. Charles Borromeo School Endowment, Sacramento

St. Dominic School Endowment, Benicia

St. Francis of Assisi School Endowment, Sacramento

St. Ignatius School Endowment, Sacramento

St. Isidore School Endowment, Yuba City

St. James School Endowment, Davis

St. John the Evangelist School Endowment, Carmichael

St. John Notre Dame School Endowment, Folsom

St. John Vianney School Endowment, Rancho Cordova

St. Joseph School Endowment, Auburn

St. Joseph School Scholarship Endowment, Redding

St. Joseph School Endowment, Redding

St. Joseph School Endowment, Sacramento

St. Lawrence School Endowment, North Highlands

St. Mary's School Endowment, Sacramento

St. Mel's School Endowment, Fair Oaks

St. Peter School Endowment, Sacramento

St. Philomene School Endowment, Sacramento

St. Robert School Endowment, Sacramento

- St. Rose School Endowment, Roseville
- St. Thomas More School Endowment, Oroville
- St. Theresa School Endowment, South Lake Tahoe

Thomas N. Burke - Class of 1954 Endowment, St. Basil, Vallejo

St. Vincent Ferrer School Endowment, Vallejo

St.Vincent Ferrer School Library and Scholarship Endowment, Vallejo

Audited Ginancial Statements December 31, 2009

Position

ASSETS

Current Assets: Cash and Cash Equivalents	\$ 739,209	
Accounts Receivable	42,849	
Total Current Assets Investments		<b>\$ 782,058</b> 14,029,706
Total Assets		\$ 14,811,764
LIABILITIES AN	D NET ASSETS	
Current Liabilities: Accounts Payable		\$ 16,181
Long-term Liabilities: Endowments Held for Others		7,950,774
Total Liabilities		7,966,955
Net Assets (Deficit): Unrestricted Temporarily Restricted Permanently Restricted	\$ (51,693) 54,079 6,842,423	
Total Net Assets		6,844,809
Total Liabilities and Net Assets		\$ 14,811,764

Activity

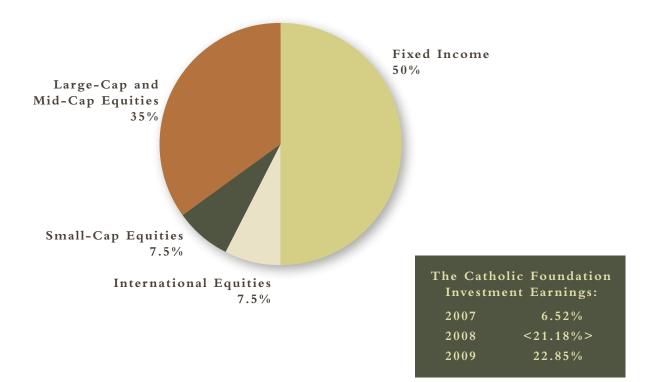
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Revenue and Reclassifications: Endowment Contributions Other Contributions Net Investment Income	Unrestricted \$ 1,163,528 1,500	Temporarily Restricted \$ 5,000 43,645 (4,500)	Permanently Restricted \$ 291,450 —	<b>Total</b> \$ 291,450 5,000 1,207,173
Net Assets Released from Restrictions <b>Total Revenue and Reclassifications</b> <b>Expenses:</b> Administrative and Financial Services Fee	1,500 1,165,028 40,138	(1,500) 47,145 —	291,450	<b>1,503,623</b> 40,138
Distributions and Grants Total Expenses Change In Net Assets	1,500 <b>41,638</b> 1,123,390		291,450	1,500 <b>41,638</b> 1,461,985
Net Assets, Beginning of Year Net Assets, End of Year	(1,175,083) <b>\$ (51,693)</b>	6,934 <b>\$ 54,079</b>	6,550,973 <b>\$ 6,842,423</b>	5,382,824 \$ 6,844,809

SUBSEQUENT EVENT: Effective January 1, 2010, the Organization merged with The Manogue Perpetual Endowment Foundation, Inc., a California nonprofit religious corporation. The Manogue Perpetual Endowment Foundation, Inc. was established to hold in trust, those perpetual endowment funds of individual parishes and their parochial schools in the Diocese of Sacramento, including the collective management, maintenance, and investment of these perpetual endowment funds. The merger is intended to provide the parishes with a continuation of the strong investment program established under the banner of The Manogue Perpetual Endowment Foundation, Inc., while also providing to these parishes access to the enhanced marketing and development expertise of the Organization. The total assets held in trust by The Foundation and assumed by the Organization as of January 1, 2010, were \$21,615,000.



DECEMBER 31, 2009



Investment Structure

INVESTMENT ADVISORS:

Christian Brothers Investment Services, Inc. (CBIS) serves as investment advisors for assets of The Catholic Foundation. All funds are invested in accord with the United States Conference of Catholic Bishops' Socially Responsible Investment Guidelines where investments are guided by Roman Catholic social and moral teaching. So, the stewardship of resources goes beyond simple fiduciary responsibilities of ensuring acceptable return on investments. Investments must reflect commitment to other values as well, such as the sacredness of life, the dignity of the individual, collaboration, and the care for the poor.

Overall, CBIS manages approximately \$3.7 billion for Catholic organizations seeking to combine faith and finances through the responsible stewardship of their assets.

## INVESTMENT COMMITTEE:

The role of the Investment Committee of the Catholic Foundation is to provide strategic input thereby ensuring strong investment performance, efficient administration, and consistent endowment growth. They accomplish these goals by advising on the Foundation's investment policies; selecting and retaining investment advisors; reviewing financial reports for timeliness, accuracy and propriety; and monitoring performance of the Foundation's portfolio.

Benefits of Giving

# HOW CAN I REPAY THE LORD FOR ALL THE GOOD DONE FOR ME?

**∼** Psalm 116:12

he Catholic Foundation practices Christian stewardship by managing individual endowment funds for the benefit of parishes, schools and agencies in the Diocese of Sacramento. Each year, an endowment's earnings are used to help finance the specific purpose for which it was created. The Catholic Foundation provides an opportunity for individuals to practice their call to Christian stewardship while supporting their local Church.

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Christian stewardship is a recognition that all blessings come from the Lord and these blessings are to be used to serve all of God's children.

Giving through The Catholic Foundation offers several benefits to donors:

Accountability	Our books are audited every year to ensure accuracy and provide open disclosure of all foundation activities.
Socially Responsible Investing	All funds in The Catholic Foundation are invested through <i>Christian</i> <i>Brothers Investment Services</i> in accord with the social responsibility guidelines of the Roman Catholic Church. Our investments, therefore, reflect the Church's values — such as the sacredness of life, the dignity of the individual, collaboration, and the care for the poor.
	Donations may be directed to specific causes that are important to the individual donor such as Catholic education, charitable works, or pastoral activities. Endowments may benefit diocesan-wide ministries as well as parishes, schools and agencies.
Named Fund	When a new fund is established, the donor may choose the fund's name. Some donors may use their own name; others may choose to memorialize a family member or revered friend.
Open-ended	Most funds held by The Catholic Foundation are open-ended. Donations may be made to the fund at any time.
Perpetuity	A gift will be held by The Catholic Foundation for perpetuity. A portion of the interest it earns will be distributed to the designated recipient ministry so that the gift keeps on giving.
Professional Management	All foundation assets are prudently managed by professional investment managers (CBIS) and overseen by the Investment Committee of The Catholic Foundation whose members represent the financial and investing fields of expertise.
Tax Advantages	Contributing through The Catholic Foundation may entitle donors to estate and income tax deductions.

THE CATHOLIC FOUNDATION OF THE DIOCESE OF SACRAMENTO, INC.

Board of Directors

THE CATHOLIC FOUNDATION OF THE DIOCESE OF SACRAMENTO

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St. Joseph Parish, Lincoln

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Mr. Robert White

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The Catholic Foundation of the Diocese of Sacramento, Inc. Good Shepherd Parish, Elk Grove 13

Most Rev. Jaime Soto Bishop of Sacramento

Rev. Msgr. James T. Murphy

phy Vicar General, Diocese of Sacramento Cathedral of the Blessed Sacrament

Advisors

Mr. Michael Halloran Executive Director

The Catholic Foundation of the Diocese of Sacramento, Inc. St. John the Baptist Parish, Folsom

Mr. James Sweeney, Esq. Attorney at Law and Partner, Sweeney & Greene, LLC Secretary St. Joseph Parish, Elk Grove

#### COMMITTEES OF THE CATHOLIC FOUNDATION

Executive Annual Catholic Appeal Audit Investment Marketing and Communications Planned Giving Stewardship

## SERVICES OF THE CATHOLIC FOUNDATION

Parish stewardship resources Annual Catholic Appeal Planned and major giving support Parish capital campaign assistance School development support Grant research for parishes and schools

To learn more about philanthropic opportunities and services of The Catholic Foundation contact Michael Halloran, Executive Director 916.733.0266 | mhalloran@diocese-sacramento.org or visit **www.tcfsac.org** 

The Catholic Coundation of the DIOCESE of SACRAMENTO, INC.

P.O. BOX 189400 | SACRAMENTO, CA 95818-9400 The Catholic Foundation of the Diocese of Sacramento, Inc. is a California Nonprofit Religious Corporation organized as a supporting organization to the Roman Catholic Bishop of Sacramento, A Corporation Sole, within the meaning of Internal Revenue Code section 509(a)(3).