The Catholic Foundation
of the Diocese of Sacramento, Inc.

2012
Annual Report
DEAR BROTHERS AND SISTERS IN CHRIST,

I am pleased to share with you this 2012 Annual Report for The Catholic Foundation of the Diocese of Sacramento. This past year reveals God’s abiding providence and the Faithful’s stalwart commitment to Christ and His Church. In this Year of Faith, we have continued to put faith into action and provide for the growing needs of God’s people.

I admire the earnest service of the members of The Catholic Foundation Board of Directors. They have exemplified a wise and generous Christian stewardship.

As we begin the Diocesan ONE Campaign, the talents, fervor, and treasures of the Church will build up the whole Body of Christ so together we grow in the image and likeness of our Lord Jesus.

Be assured of my prayers.

Respectfully,

+Jaime Soto
Bishop of Sacramento
“What identifies a steward? Safeguarding material and human resources and using them responsibly are one answer; so is generous giving of time, talent, and treasure. But being a Christian steward means more. As Christian stewards, we receive God’s gifts gratefully, cultivate them responsibly, share them lovingly in justice with others, and return them with increase to the Lord.” (USCCB 2013)

DEAR FRIENDS IN CHRIST,

It is with this spirit of stewardship in mind that I would like to express my sincere gratitude for your support of the many good works of the Diocese of Sacramento.

The Catholic Foundation exists as a trusted and experienced administrator for the disbursement of funds from donors for religious, educational and social ministries. The foundation is a witness to Christ and His Gospel values of love, justice, forgiveness and service to all by ensuring that financial donors can effectively support the well-being of Catholic works in our diocese. It provides an opportunity for you to practice your call to Christian stewardship while supporting your local Church.

As Executive Director of The Catholic Foundation of the Diocese of Sacramento, I pledge to you, our parishioners, that we will be good stewards of the gifts the Church will receive through your generosity. We will also ensure accountability and provide reporting on a regular basis so that you, the faithful, have confidence in knowing that your gifts are creating the effect we collectively desire. I ask for your trust and confidence in our ability and our commitment to do this well.

In Christ’s peace,

Rick Maya
Executive Director

From the EXECUTIVE DIRECTOR

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In Christ’s peace,

Rick Maya
Executive Director

The Catholic Foundation

4 MAJOR FUNCTIONS

FUND DEVELOPMENT
to support the Bishop’s Strategic Plan

PARISH SERVICES
to support financial goals at the parish level

COMMUNITY OUTREACH
to build donor, government, board and media relations

IMPACT REPORTING
to communicate results, accomplishments, and accountability

MILESTONES

2009
The Manogue Perpetual Endowment Foundation was merged into The Catholic Foundation, creating a much larger and more robust organization.

A comprehensive parish-based Stewardship, A Way of Living, was developed and provided to all parishes diocese-wide.

2010
The first ever Stewardship, A Way of Living Conference was organized by The Catholic Foundation, which featured speakers of local and national acclaim and was attended by more than 300 clergy, religious and lay leaders.

The Catholic Foundation hosted a SUCCEED Schools celebration attended by more than 225 supporters.

2011
Participation level and financial results of the Annual Catholic Appeal continued to reach new thresholds.

Exploration of opportunities to raise capital for the implementation of the initiatives of the diocesan Strategic Plan began.

A newly-defined governance model for Catholic Schools began.

2012
Bishop Soto published a diocesan-wide Strategic Plan following a 2-year discernment process.

More than 450 people gathered for the first annual Catholic Advantage Celebration, a new event to recognize the many achievements of Catholic Schools in the Diocese of Sacramento.

The Annual Catholic Appeal published its first annual Report of Gratitude on behalf of more than 110,000 individuals and families who received desperately-needed assistance in 2012.

The ONE Campaign began the early stages of capital fundraising to support Bishop Soto’s Strategic Plan.
IN 2011, ST. FRANCIS HIGH SCHOOL in Sacramento became the proud beneficiary of the Diocese of Sacramento’s first Charitable Gift Annuity (CGA). In 2012, as a result of the addition of a Parish Support and Donor Relations Manager to Foundation staff, four new CGA gift plans were secured to benefit the following parishes and schools:

- Our Lady of Lourdes School, Colusa
- St. John Notre Dame School, Folsom
- Holy Spirit Parish, Sacramento
- Notre Dame School, Vacaville

ON SEPTEMBER 8, MORE THAN 450 PEOPLE gathered for The Catholic Advantage Celebration, a new annual event to recognize the many achievements of Catholic schools and those who make them what they are today.

Proceeds from the evening, held at St. Francis High School in Sacramento, support students with the resources they need for success not only now, but in college and beyond.

“The words and deeds of the Christian Brothers will echo throughout the Valley and through the generations.”

Monsignor Edward Kavanagh headed St. Rose Parish and St. Patrick’s School and Orphanage in Sacramento for more than 50 years.

The Catholic Foundation is grateful to event sponsors:

PLATINUM SPONSORS
The Fitzpatrick Family
Jackson Properties, Inc.
Pacific Coast Building Products

GOLD SPONSORS
Bank of America
NextCloud
Wells Fargo

SILVER SPONSORS
California Business for Education Excellence
CTB McGraw-Hill
Genovese Burford & Brothers
OfficeMax
St. Francis High School

THE ST. ANGELA MERICI SCHOLARSHIP FUND, A TUITION ASSISTANCE FUND THAT WILL SUPPORT CATHOLIC SCHOOL FAMILIES IN NEED WHEN DEALING WITH THE LOSS OF A PARENT OR LEGAL GUARDIAN WAS ANNOUNCED.

CHARITABLE GIFT ANNUITIES OFFER DONORS OF MANY FINANCIAL LEVELS AN OPPORTUNITY TO SUPPORT THEIR LOCAL CATHOLIC COMMUNITY WHILE SUPPLEMENTING THEIR ANNUAL INCOME.
EVERY TIME A CHILD finds safety and hope, a family has a breakthrough, a marginalized person rebuilds a life of dignity, a seminarian moves closer to ordination or a student is able to stay in Catholic school, we are thankful for the nearly 29,000 donors who committed more than $3.5 million this year.

The strategic plan is an exciting and ambitious endeavor. In 2012, Bishop Soto and The Catholic Foundation began the ONE Campaign, a major capital campaign to raise a minimum $50 million, 5 million service hours, and 5 million faith formation hours.

THE MOST REVEREND BISHOP JAIME SOTO released his strategic plan, titled "A Hopeful and Effective Sacrament of Christ in Northern California" on March 6, 2012. In the plan, the bishop calls upon the Catholic people of the Diocese to:

• revitalize Catholic education
• invigorate the formation of the laity
• encourage our youth and young adults
• challenge them to serve Christ and His Church
• announce the Gospel in the public square of social media
• serve the poor and marginalized more effectively and
• harness the resources so this can all be done.
CATHOLIC SCHOOLS / TUITION ASSISTANCE

ENDOWMENTS

A.G. Kaus Family Scholarship Endowment for High Schools
All Hallows Endowment, Sacramento
Apostle of Sacred Heart of Jesus, St. Charles, Sacramento
Believe / Catholic Schools Scholarship Endowment
Bishop Quinn Catholic Center Endowments
Bishop Quinn Catholic Center Al DeTourney Music Endowment
Bishop Quinn Catholic Center Maintenance Endowment
Burkigh Scholarship Fund, St. Thomas More, Paradise
Charlotte Mac Church Memorial Scholarship Fund, St. Robert, School, Sacramento
Donald W. “Bill” Littlejohn Scholarship Fund, Colusa
Edward L. Lammerding Scholarship
Edward & Vera Langen Scholarship Endowment
Everett V. O’Rourke Scholarship Endowment for High Schools
Greenleaf Scholarship Fund, St. Patrick / St. Vincent High School
Hansen Tuition Assistance Fund, Holy Rosary School, Woodland
Helmut Faulkner Scholarship Fund, Mercy High School, Red Bluff
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
Ima Stoll Scholarship Trust
Immaculate Conception School Endowment, Sacramento
Isabel Dinelli Cristo Rey Scholarship Fund
Isabel Dinelli Scholarship Fund
John J. Losser Estate Scholarship
John Robert Keane Memorial Scholarship Endowment
Lomelle P. McKenna-Faulkner Endowment
Mary Van Geffen Scholarship, Notre Dame, Marysville
Maurice Dixon Scholarship Memorial Endowment for Mary Van Geffen Scholarship, Notre Dame, Marysville
Lornelle P. McKenna-Faulkner Endowment
John Robert Keane Memorial Scholarship Endowment
Presentation School Endowment, Sacramento
Preserving our Past Building our Future Scholarship Endowment for Catholic Schools
Preserving our Past Building our Future Scholarship Endowment for Religious Education and Lay Ministry
Raymond J. Spingall College Scholarship Fund
Richard & Nancy Quinn Scholarship, Notre Dame School, Vacaville
Richard J. Lee Memorial Scholarship Fund
Ring Scholarship Fund, Sacred Heart School, Sacramento
Robert R. Ulfran Endowment Fund, St. Patrick/St. Vincent High School
Rosemary Trainer Bradley Memorial Endowment Award
Sacred Heart School Endowment, Red Bluff
Sacred Heart School Foundation Endowment, Sacramento
SCORE Scholarship Endowment
SCORE Small and Rural Schools Endowment
St. Anne Endowment, Sacramento
St. Basil School Endowment, Vallejo
St. Charles School Endowment, Sacramento
St. Dominic School Endowment, Benicia
St. Francis High School Endowment
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 Notre Dame School Endowment, Folsom
St. John the Evangelist School Endowment, Carmichael
St. John Vianney Endowment, Rancho Cordova
St. Joseph School Endowment, Auburn
St. Joseph School Endowment, Redding
St. Joseph School Endowment, Sacramento
St. Joseph School Scholarship Endowment, Redding
St. Lawrence Endowment, North Highlands
Nancy E. Murray-Warchler Scholarship Fund, St. Thomas, Oroville
Nellie J. Schuler Scholarship Fund
Notre Dame School Endowment, Chico
Notre Dame School Endowment, Marysville
Notre Dame School Endowment, Vacaville
Our Lady of Lourdes School Endowment, Colusa
Our Lady of the Assumption School Endowment, Carmichael
Presentation School Endowment, Sacramento
Preserving our Past Building our Future Scholarship Endowment for Catholic Schools
Preserving our Past Building our Future Scholarship Endowment for Religious Education and Lay Ministry
Raymond J. Spingall College Scholarship Fund
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St. Dominic School Endowment, Benicia
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St. Francis of Assisi School Endowment, Sacramento
St. Ignatius School Endowment, Sacramento
St. Isidore School Endowment, Yuba City
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St. John Notre Dame School Endowment, Folsom
St. John the Evangelist School Endowment, Carmichael
St. John Vianney Endowment, Rancho Cordova
St. Joseph School Endowment, Auburn
St. Joseph School Endowment, Redding
St. Joseph School Endowment, Sacramento
St. Joseph School Scholarship Endowment, Redding
St. Lawrence Endowment, North Highlands
St. Mary’s School Endowment, Sacramento
St. Mel’s School Endowment, Fair Oaks
St. Patrick / St. Vincent High School Endowment
St. Patrick / St. Vincent High School Memorial Scholarship Fund
St. Peter Endowment, Sacramento
St. Philomena School Endowment, Sacramento
St. Robert School Endowment, Sacramento
St. Rose School Endowment, Roseville
St. Theresa Parish School Endowment, South Lake Tahoe
St. Thomas More School Endowment, Oroville
St. Thomas More Catholic Education Endowment, Paradise
St. Vincent Ferrer School Endowment, Vallejo
St. Vincent Ferrer School Library and Scholarship, Vallejo
SUCCESS Schools Endowment Fund
The Leandro and Mary Tirapelle Scholarship Fund
Thomas & Beverly Burke Endowment Fund, St. Patrick / St. Vincent High School
Thomas N. Burke Class of 1954, St. Basil, Vallejo
Timothy Grover Memorial Scholarship, St. John Nisler Dame School, Folsom
Violet Scholarship Endowment for College
William Randolph Hearst Small and Rural School Endowment
PARISH ENDOWMENTS

Fr. Michael J. Dillon Scholarship, Rocklin
Guarand and Veronica Frizzet Endowment, St. Joseph Parish, Sacramento
Mary B. Allen Trust Endowment, Sacred Heart Parish, Gridley
Marya Welch-Memorial Hall Endowment, St. James Parish, Davis
Richard Lambert Trust, St. John the Baptist Parish, Chico
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. Rose Parish Education Endowment, Roseville
St. Therese Parish Endowment, Redleton
St. Vincent Ferrer Parish Endowment, Vallejo
William and Marianne Adams Endowment, Queen of the Snows Parish, Tahoe City

VOCATIONS ENDOWMENTS

Bishop William K. Weigand Seminarian Endowment
Catherine and Patrick Dunning Memorial Fund
Cottle Endowment
Fred W. Lammerding Seminarian Education Endowment
Helen R. Hogan Seminarian Education Endowment
Holy Family Parish Religious Vocations Endowment
Joe and Edna Fisher Seminarian Endowment
Mary Luddy Seminarian Education Endowment
Preserving our Past Building our Future Scholarship Endowment for Seminarian Education
Priests Vocations Endowment
William H. Furler Seminarian Endowment

HUMAN SERVICES/SOCIAL MINISTRIES/OTHER

Camp ReCreation Endowment
Helena St. Louis Endowment
Oxnard Sprague Mass Intentions Endowment
Povereillo Endowment for Social Programs
Preserving Our Past, Building Our Future Social Services Endowment
The Messenger Family Donor Advised Fund
The Social Services Fund

CEMETERY PERPETUAL CARE FUNDS

Department of Cemeteries Endowment Fund
Department of Cemeteries Veterans Endowment Fund
St. Joseph’s Cemetery, Redding
St. Patrick’s Cemetery, Placerville

THE CATHOLIC FOUNDATION OF THE DIOCESE OF SACRAMENTO, INC.
FINANCIAL STATEMENTS
YEARS ENDED DECEMBER 31, 2012 & 2011

FINANCIAL POSITION

<table>
<thead>
<tr>
<th>ASSETS</th>
<th>2012</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Assets:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cash and Cash Equivalents</td>
<td>$264,255</td>
<td>$173,885</td>
</tr>
<tr>
<td>Accounts Receivable</td>
<td>2,750</td>
<td>—</td>
</tr>
<tr>
<td>Total Current Assets</td>
<td>267,005</td>
<td>173,885</td>
</tr>
<tr>
<td>Investments</td>
<td>61,849,484</td>
<td>57,883,143</td>
</tr>
<tr>
<td>Total Assets</td>
<td>$62,116,489</td>
<td>$58,057,028</td>
</tr>
</tbody>
</table>

LIABILITIES AND NET ASSETS

<table>
<thead>
<tr>
<th>2012</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Liabilities:</td>
<td></td>
</tr>
<tr>
<td>Accounts Payable</td>
<td>$109,426</td>
</tr>
<tr>
<td>Other liabilities</td>
<td>13,106</td>
</tr>
<tr>
<td>Total Current Liabilities</td>
<td>122,532</td>
</tr>
<tr>
<td>Long-term Liabilities:</td>
<td></td>
</tr>
<tr>
<td>Endowments Held for Others</td>
<td>53,263,941</td>
</tr>
<tr>
<td>Total Liabilities</td>
<td>53,386,473</td>
</tr>
<tr>
<td>Net Assets:</td>
<td></td>
</tr>
<tr>
<td>Temporarily Restricted</td>
<td>1,205,878</td>
</tr>
<tr>
<td>Permanently Restricted</td>
<td>7,524,138</td>
</tr>
<tr>
<td>Total Net Assets</td>
<td>8,730,016</td>
</tr>
<tr>
<td>Total Liabilities and Net Assets</td>
<td>$62,116,489</td>
</tr>
</tbody>
</table>

ACTIVITIES

Revenue and Reclassifications:

<table>
<thead>
<tr>
<th>2012</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unrestricted</td>
<td>Temporarily Restricted</td>
</tr>
<tr>
<td>Revenue and Reclassifications</td>
<td></td>
</tr>
<tr>
<td>Endowment Contributions</td>
<td>—</td>
</tr>
<tr>
<td>Other Contributions</td>
<td>—</td>
</tr>
<tr>
<td>Net Investment Income</td>
<td>—</td>
</tr>
<tr>
<td>Management Fee Revenue</td>
<td>368,121</td>
</tr>
<tr>
<td>Net Assets Released from Restrictions</td>
<td>434,315</td>
</tr>
<tr>
<td>Total Revenue and Reclassifications</td>
<td>802,436</td>
</tr>
</tbody>
</table>

Expenses:

<table>
<thead>
<tr>
<th>2011</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unrestricted</td>
<td>Temporarily Restricted</td>
</tr>
<tr>
<td>Administrative and Financial Services Fee</td>
<td>426,486</td>
</tr>
<tr>
<td>Distributions and Grants</td>
<td>375,950</td>
</tr>
<tr>
<td>Total Expenses</td>
<td>802,436</td>
</tr>
<tr>
<td>Change in Net Assets</td>
<td>—</td>
</tr>
<tr>
<td>Net Assets, Beginning of Year</td>
<td>—</td>
</tr>
<tr>
<td>Net Assets, End of Year</td>
<td>$1,205,878</td>
</tr>
</tbody>
</table>

TARGET ASSET ALLOCATION

- **Fund Income** 50%
- **International Equities** 7.5%
- **Small-Cap Equities** 7.5%
- **Large-Cap and Mid-Cap Equities** 35%
The Catholic Foundation will serve as a dynamic catalyst for bringing together the essential financial resources to build and sustain, for present and future generations, the Catholic Church’s work in Catholic education, lay formation, youth and young adult ministry, vocations and charity.

### THE CATHOLIC FOUNDATION ACTION STEPS

- continue to promote and develop the practice of stewardship as part of faithful Christian discipleship
- together with the Office of Social Ministries, continue to grow the potential of the Annual Catholic Appeal to support the growth and expansion of services needed by at-risk families in our communities
- promote the availability of planned giving instruments and other opportunities for supporting the works of the Foundation
- work with Bishop Soto to conduct a Diocesan Capital Campaign in 2013. The Campaign will primarily strengthen existing endowments and establish new endowments to support Catholic education and youth and young adult ministry. It will also support other initiatives proposed in the strategic plan

Details available at [www.diocese-sacramento.org/diocese/pdfs/DiocesanStrategicPlanEnglish.pdf](http://www.diocese-sacramento.org/diocese/pdfs/DiocesanStrategicPlanEnglish.pdf)

### Ways to Give

<table>
<thead>
<tr>
<th>Type of Gift</th>
<th>Form of Gift</th>
<th>Benefit to You — The Donor</th>
<th>Benefit to Foundation Ministries</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Outright Gift</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unrestricted</td>
<td>Cash, Stock/Securities, Insurance, Real Estate, Personal Property, etc.</td>
<td>Charitable tax deduction, Avoidance of capital gains tax, Opportunity to make a gift to a designated ministry(ies)</td>
<td>Immediate benefit to ministry(ies) of donor choosing (or Foundation may choose)</td>
</tr>
<tr>
<td><strong>Outright Gift</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Endowment</td>
<td>Cash, Stock/Securities, Insurance, Real Estate, Personal Property, etc.</td>
<td>Charitable tax deduction, Avoidance of capital gains tax, Opportunity to make a gift to a designated ministry(ies), Honor a loved one</td>
<td>Ongoing support to donor designated ministry(ies), Opportunity for heirs to participate in philanthropy</td>
</tr>
<tr>
<td><strong>Charitable Gift</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Annuity</td>
<td>Cash, Stock/Securities</td>
<td>Guaranteed income for life at rates higher than bank CDs, Portion of income is tax-free, Charitable income tax deduction plus possible reduction of taxable estate</td>
<td>Upon annual of donor life or end of contract, remaining assets support parish, school or designated ministry(ies)</td>
</tr>
<tr>
<td><strong>Donor Advised Fund</strong></td>
<td>Cash, Stock/Securities, Insurance</td>
<td>Donor recommends recipient ministries, Advice in determining appropriate ministry(ies), Charitable tax deduction, possible reduction of taxable estate</td>
<td>The Foundation receives gift for immediate and future use, Opportunity for heirs to participate in philanthropy</td>
</tr>
<tr>
<td><strong>Charitable Remainder Trust</strong></td>
<td>Cash, Stock/Securities, Real Estate, Any appreciated property</td>
<td>Donor receives income stream, Charitable tax deduction, Possible reduction of taxable estate, plus avoidance of capital gains tax</td>
<td>Upon end of donor life, remaining trust assets support designated ministry(ies)</td>
</tr>
<tr>
<td><strong>Bequest: In Will or Trust</strong></td>
<td>Cash, Stock/Securities, Personal Property, etc., Percentage of estate, Remainder of estate</td>
<td>Possible reduction of taxable estate, Create legacy honoring a loved one, Opportunity to designate ministry(ies)</td>
<td>Funds designated ministry(ies) (or by Foundation if unrestricted)</td>
</tr>
<tr>
<td><strong>Life Insurance</strong></td>
<td>Name the Foundation as policy owner and/or beneficiary</td>
<td>Future gift at manageable cost, Charitable tax deduction</td>
<td>The Foundation receives full face value of policy upon death of the donor, or current surrender value</td>
</tr>
<tr>
<td><strong>Retirement Plan / IRA / Annuity</strong></td>
<td>Name the Foundation as beneficiary</td>
<td>Donor maintains control during life, avoids tax at death, Opportunity to designate ministry(ies)</td>
<td>Upon end of donor life, immediate support of Foundation ministry(ies)</td>
</tr>
</tbody>
</table>
The Catholic Foundation of the Diocese of Sacramento, Inc.

BOARD OF DIRECTORS

CHAIRMAN
Most Rev. Jaime Soto

PRESIDENT
Mr. Kelly Brothers
Partner
Genovese, Burford and Brothers

VICE PRESIDENT
Mr. Thomas C. Meuser
Chairman and CEO
El Dorado Savings Bank

TREASURER
Mr. Thomas J. McNamara
Chief Financial Officer
Diocese of Sacramento

Ms. Beth Mullen, CPA
Managing Principal
CohnReznick Group, P.C.

Rev. Msgr. James T. Murphy
Vicar General
Diocese of Sacramento

Mrs. Kathy Pescetti
President
Admail West

Mr. Terence J. Street
President
Street Consulting

STAFF

Mr. Rick Maya
Executive Director

Mrs. Chantal LeFevre
Associate Director

Ms. Christine Tinsay
Administrative Assistant

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 well-being of Catholic works in our diocese.

SERVICES

Parish stewardship resources  |  Annual Catholic Appeal  |  Planned and major giving support
Parish capital campaign assistance  |  Parish school development support

916.733.0266  |  www.tcfsac.org