



Faithful Stewardship



The Catholic Foundation
of Central Florida
Inspire Giving. Fund God's Work.

*Faith-Based Investment Management
Engaging Donor Experiences
Community Leadership and Impact*

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Our Mission:

To inspire and increase giving, to prudently invest the resources entrusted to us, and to capably steward those charitable gifts to support the spiritual and corporal needs of the community of the Diocese of Orlando.

My Sisters and Brothers in Christ,

Grace and Peace of our Lord Jesus Christ be with you. What is faithful stewardship? St. Matthew reminds us that it is living in the light of God; offering God to each other; and thus creating a holy earth. How does faithful stewardship come about? By receiving The Eucharist and being a Eucharist. We are a part of God's story. Our Holy Father, Pope Francis, encourages us to "write stories of redemption on the pages of our time." As we receive Christ in the Eucharist, we continue salvation history for Jesus Christ is yesterday, today and forever. Faithful stewardship is the offering of ourselves to God and through our offering, God is made known—His light shines through our daily living and we are transfigured.

The ministry of the Catholic Foundation of Central Florida transfigures God's people because of you! You, as participants within the ministry of this life-giving organization, offer your self-sacrifice to our triune God as you are nourished by His body. Being a Eucharist is the light which brings heaven on earth. It is the essence of our baptismal call.

Open this Impact Report and be filled with the light of salvation as we praise God by your faithful stewardship. Know of my gratitude for each one of you as you love one another other as Jesus loves you.

May we live as a Eucharist that our deeds glorify our heavenly Father, that His light fills the earth.

Sincerely yours in Christ,



Most Reverend John Noonan
Bishop of Orlando



*Just so, your
light must shine
before others,
that they may
see your good
deeds and
glorify your
heavenly Father*

Matthew 5:16



Faithful Stewardship,

The Catholic Foundation of Central Florida board and staff are grateful to our stakeholders who joined us during this past fiscal year to address community needs in our post-pandemic world. This annual report is a message of love. It is our one collective opportunity to look back at where we have been in the past year and where we are called to move forward in Christ tomorrow. In 2021, Our dedicated board of directors gathered to review the implementation of our strategic plan, launched in 2019, and with feedback from our stakeholders and diocesan partners we updated the plan. The updated plan continues to support our mission to uplift our community in profound ways.

Our top priority in the revised plan is to continue harmonizing with our partners to provide maximum community impact. We obtained some valuable feedback from our stakeholders which advised us that the Foundation is truly moving the needle in terms of community support. Other feedback noted we still have some work to do to determine how best we can serve the needs of our parishes. We are committed to continuously improving our existing programs and services that serve our partners, donors, and the Central Florida community. Please know your feedback, prayers, and guidance are greatly appreciated as we continue to serve our amazing, and deserving community, a mission rooted in love.

Thanks to your generosity and faithful stewardship through our investment services, The Foundation board granted over \$1.7 million derived from endowments to strengthen our Central Florida community. We were able to provide:

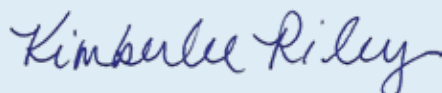
- Catholic school tuition assistance for students in need
- Housing and employment services for adults with disabilities
- Housing, nutritious food, medical and behavioral healthcare for our neighbors
- Priest retirement and seminarian formation
- Faith formation for adults and children

We've added some new faces to the Foundation! Each new teammate has a proven commitment to service, shares our Catholic values, and brings his/her God-given skills to support our work.

The Catholic Foundation of Central Florida has some exciting initiatives ahead engaging with Catholic philanthropists to support our Central Florida community and build the Kingdom of God.

We would not have the resources to achieve greater service to our Central Florida community without also relying on your faith and commitment to the Foundation over the past year. For that we give thanks and glory to God and to you, for your continued support. On behalf of our Board of Directors and Foundation staff: thank you for partnering with us in our mission of Faithful Stewardship together. May God's peace always be with you.

Sincerely,



Kimberlee Riley, CAP®
President and CEO



Tom Chandler
Chairman

Donor Stories

Vuong DAF

The Vuongs chose the name St. Philip Phan Van Minh to honor the Vietnamese saint and have high hopes that they can influence other Vietnamese parishioners to consider using the donor advised fund at The Catholic Foundation for their charitable work. Mr. Vuong noted he is pleased he can make an impact on a variety of ministries through his donor advised fund, including the local food pantry, and thanks God for opening his eyes to this opportunity to give back.



Jean Reynolds Legacy

Jean's hope for the future is that by leaving a legacy gift to their ministry, Catholic Charities of Central Florida will be able to continue the impactful work they are doing in this community.



Bosley Legacy

Paul Bosley and his wife, Gaetana, made their own planned gift and became members of the Vivos Christi Society. This society recognizes anyone in the Diocese who has made a planned gift to their parish, parish school, or any Diocesan ministry or entity. "It was an obvious decision for me to continue my legacy of faith by making a planned gift to St. Patrick Catholic Church."



Scan here to read more donor stories.

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

- 1 Peter 4:10

Foundation Board and Team



front row: Karen Monteleone, Lori Tolland, Elisha González, Sister Maria Teresa Acosta, Dr. Erika Wikstrom
back row: Very Reverend Ivan Olmo, David R. Ramos, Orlando Evora, Bishop John Noonan, J. Thomas Chandler, Robert Kryger, John R. Kancilia, Kevin F. Bowler, Randall Scott **not pictured:** Very Reverend John C. Giel, Very Reverend Richard Trout, Jessica Bracero



front row: Jannah Szeibert, Rosie Camous, Michelle Adams, Doris Quiñones, Kimberlee Riley, Madelyn Weed, Marco Robles, Roxanna O'Neill
back row: Lisa Henrickson, Susan Diaz, Bryce Howard, Thien Nguyen, Marta Sweeney, Charlie Van Patten, Chris Williams, José Solá, Elle Voorhees **not pictured:** Susan Hunt



Board Retreat/ Annual Meeting

Marta Sweeney - 30 Years



Marta Sweeney celebrated her 30th anniversary of service to the diocese in May of 2022. We are so grateful for her loving and faithful service, and her commitment to the Catholic community in Central Florida.



Our New Team Members

Staffing July 1 2021 - June 30 2022



Michelle, Bryce, Lisa, Thien, Jannah, Charlie

Awards and Honors

Platinum
Transparency
2023

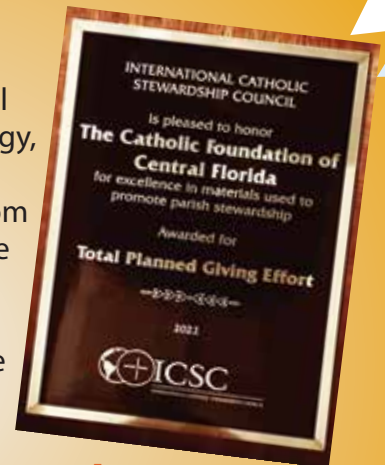
Candid.

Platinum Seal of Transparency 2023

We're beyond excited to announce that we've earned the Candid Platinum Seal of Transparency. This particular seal is the highest rating that a nonprofit can achieve and exhibits transparency and that we exceed nonprofit industry standards.



It was our distinct pleasure to host lunch for some of the Orlando attendees of the ICSC (International Catholic Stewardship Council). Clergy, Foundation team members and other stewardship professionals from around the diocese attended. Some of the attendees were recipients of a grant scholarship. The Catholic Foundation was honored to receive the following ICSC recognition:



Excellence Award
Total Planned Giving

Honorable Mention
Total Foundation Effort



Recipients of a Growing Your Parish Stewardship Grant:

Blessed Sacrament, Clermont,
Luis Ortiz Business Administrator
St. Isaac Jogues, Fr. Jose Bautista Pastor
Holy Family, Daniel Cherry
Communications and Development Manager
St. Joseph, Orlando and St. Isaac Jogues,
Dennis Johnson Jr. Director of Parish Life





Standing: Karen Monteleone, Marta Sweeney, Madelyn Weed, Bishop Noonan, Gabriel Pedrero, Darnell Devaney, Kieran Riley, Tom Chandler, Kevin Casey, Greg Meier. **Seated:** Kimberlee Riley, Tim Riley, Theresa Simon



Elisha González, Foundation board member, Educator and Public Affairs Executive at FAIRWINDS Credit Union

National Philanthropy Day November 2022

National Philanthropy Day is a celebration each November across the U.S. recognizing the profound impact philanthropy has on the fabric of society. It is the compassion and selflessness of local heroes that the Association of Fundraising Professionals is proud to recognize through National Philanthropy Day. The program honors individuals, corporations, foundations, civic and service groups, and nonprofit organizations in Central Florida whose efforts change the face of our community.

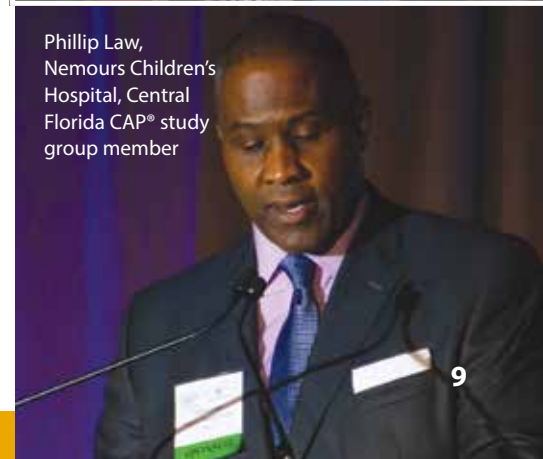
In 2022, President & CEO, Kimberlee Riley was recognized as a champion for collective philanthropy and was awarded the Terri S. Chastain Award for Outstanding Fundraising Professional. Kimberlee remarked, "Receiving an individual award like this reflects and lifts up how well an individual is supported in the community. I am honored to receive the award on behalf of our donors, board, staff and partners."



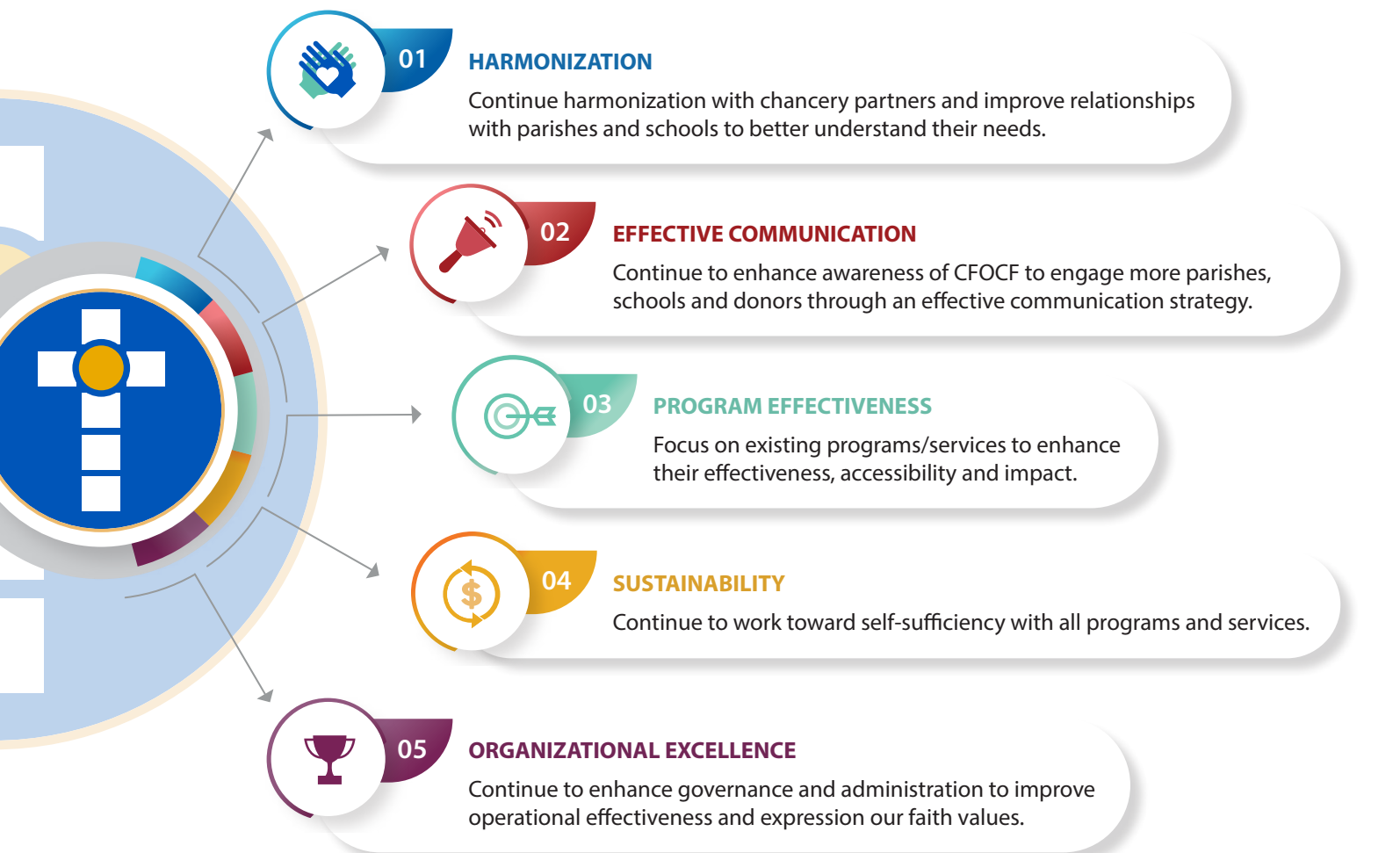
Phillip Law, Nemours Children's Hospital, Central Florida CAP® study group member



Kimberlee; Min Kim, Executive Director at the Edyth Bush Institute for Philanthropy and Nonprofit Leadership



Strategic Plan 2022-2024



IMPACT LIVES • DEEPEN FAITH • SERVE OTHERS • INSPIRE GIVING • STEWARD GIFTS • SUPPORT COMMUNITY

Vision

To be the foremost philanthropic organization through which our community contributes to fund God's work in order to impact lives and promote the Gospel, which builds the Kingdom of God.

Mission

To inspire and increase giving, to prudently invest the resources entrusted to us, and to capably steward those charitable gifts to support the spiritual and corporal needs of the community of the Diocese of Orlando.

Values

Faith-filled Passion

We nurture our faith to inspire others to transform lives through charitable giving.

Collaboration

Through partnerships, we leverage community resources to maximize impact.

Stewardship

We recognize all gifts are from God and we are called to honor donor intentions and use prudence to return gifts with increase.

Transparency

We are open and honest in our communications to provide access to information.

Servant Leadership

We listen and learn from our community and invest in initiatives to meet their needs.

Impact

We engage donors in serving the needs of our community and advancing ministries of the Catholic Church.

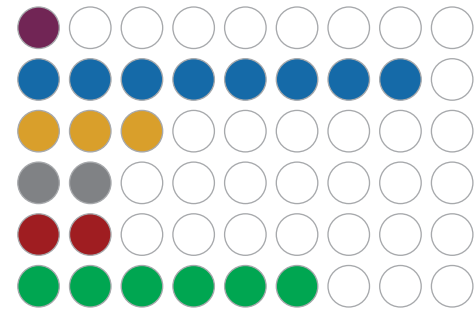


The Catholic Foundation
of Central Florida
Inspire Giving. Fund God's Work.

Catholic Compliant Investment Management Services

Endowment Funds

Catholic College and University:	\$1.6 million
Catholic Education:	\$29.5 million
Church Leadership and Development:	\$9.3 million
Clerical Life:	\$4.4 million
Outreach Ministries:.....	\$5.9 million
Parish Life:.....	\$15.1 million



Endowment Grants

30 students benefit from tuition grants.....	\$64,093
18 schools receiving grants	\$488,712.72
Catholic Campus Ministry	\$60,959
33 ministries receiving grant distributions	
Total grant dollars	\$1,856,309.56

Reserve Funds

Catholic Education:	\$10.5 million
Parish Life:.....	\$8.7 million
Church Leadership and Development:	\$516,737
Clerical Life:	\$63,263
Outreach Ministries:.....	\$1.6 million



Catholic investment portfolios should:

- Protect Human Life
- Promote Human Dignity
- Reduce Arms Production
- Pursue Economic Justice
- Protect the Environment
- Encourage Corporate Responsibility



Catholic Compliant Funds

99.3% Compliance Rate

While some mutual funds may have exposure to investments which are not in compliance with USCCB guidelines, the potential exposure is only 0.6% of our total investment portfolio.

Catholic Compliant Investment Management Services

Donor Advised Funds *(as of June 30, 2022)*

(11) \$521,046

Nonprofits Supported by DAF Grants



DAF Grantee Organization *(July 1, 2021 – June 30, 2022)*

Bishop Grady Villas/
Magnify
Catholic Campus
Ministry at the University
of Central Florida
Catholic Charities
of Central Florida, Inc.
Catholic Charities Winter
Haven Food Pantry
Catholic Leadership
Institute
Catholic Relief Services
Catholic Volunteers
in Florida
Co-Cathedral of
St. Thomas More
Cross Catholic Outreach
Family Promise
of Greater Orlando

Father Lopez Catholic
High School
Foundation Order
of Malta, Inc
Hope Community Center
JMJ Life Center, Inc
Kibale Uganda
Development Union, Inc.
Marmion Abbey
& Academy
Opus Sectorum
Angelorum
Our Catholic Appeal
Prince of Peace
Catholic Church
Providence College
Schools of Saint Dominic
Shepherd's Fund

Shepherd's Hope, Inc.
St. Brendan
Catholic Church
St. James Cathedral
Catholic Church
St. John Vianney
Catholic Church
St. Joseph Catholic
Church Winter Haven
St. Margaret Mary
Catholic Church
St. Philip Phan Van Minh
Catholic Church
The Catholic Foundation
of Central Florida, Inc.
Villa Duchesne
and Oak Hill School
Waterleaf Women's Clinic

New DAFs

The DeVaney Family
Charitable DAF
The Kryger Family "St.
Theresa" DAF
The Mannanchery-Rose
Catholic Charitable DAF
The McCormack Family
Legacy DAF
The Meier Family Legacy
DAF
The Ordoñez Family DAF
The Dr. James and Sally
Studlo DAF

Endowment Funds

(as of June 30, 2022)

Catholic College and University

\$1.6 Million

Bishop Stephen D. Parkes Endowment for Catholic Campus Ministry

Catholic Campus Ministry Endowment Fund

Catholic Campus Ministry Endowment Fund (AIC)

Catholic Education

\$29.5 Million

Adelaida Valdes Endowment Fund

AIC Tuition Assistance

Andrew P. Caneza Foundation Endowment Fund

Ann Hefferin Memorial Endowment Fund

Bud Farmer Scholarship Fund

Church of Our Saviour Catholic School Endowment

Dave Powers Memorial Endowment Fund

Dawn Michelle Aberwald Memorial Endowment Fund

Deforest W. and Margaret Y. Bullard Scholarship Fund

Elizabeth Buckley Scholarship Fund

Fr. Frank Zammit Endowment Fund

Fr. Joseph Nolan Education Endowment Fund

Fr. Sean Heslin Scholarship Endowment Fund

Gary Burkey Student-Athlete Endowment Fund

Gentile Scholarship Endowment Fund

Guardian Angel Endowment Fund

Holy Redeemer Catholic School Endowment Fund

Joanne C. Brown Endowment Fund

Joe Cadden Memorial Scholarship Endowment Fund

Joe Skinner Endowment Fund

Kelly Reen Memorial Fund

Leonard T. (Pat) Murphy Scholarship Endowment

Maria Boudet & de la Roza Family Endowment Fund

Marie Nolin Scholarship Endowment

Murray Scholarship Endowment Fund

Our Lady of Hope Catholic Education Endowment Fund

Our Lady of Lourdes (Melbourne) School Endowment Fund

Raymond H. Giel Endowment Fund for St. Paul School

Resurrection Catholic School Endowment Fund

Richard L. & Rita C. Lienenbrink Scholarship Endowment

Ronald and Patricia Gendreau Endowment Fund

Santa Fe Catholic High School Endowment Fund

St. Andrew School Endowment

St. James Cathedral School Endowment Fund

St. John Vianney Catholic School Endowment Fund

St. Margaret Mary School Teacher Endowment Fund

St. Timothy Catholic Church Educational Endowment Fund

The Annunciation Catholic Academy Endowment and Charitable Trust

The Dorothy and Walter Shelley Family Scholarship Endowment Fund

The Henry S. Sitkowski Memorial Scholarship Endowment

The Ian A. Gilmore Memorial Scholarship Endowment

The Jillian Elizabeth Blais Memorial Scholarship Endowment Fund

The Men of Holy Family School Endowment Fund

The Michael Scheve Endowment Fund

The Sister Elizabeth Murphy Tuition Assistance Fund

The St. Teresa Catholic School Endowment Fund

The Sylvia Hope Horrigan Memorial Scholarship Endowment

Tuition Assistance Scholarship Endowment Fund

Xavier Leyva Quintana Scholarship Endowment Fund

Church Leadership and Development

\$9.3 Million

The Catholic Foundation of Central Florida Endowment Fund

Deacons 5+ Year Reserve Fund

Recruiting and Forming Clergy and Lay Leaders Endowment Fund (AIC)

Clerical Life

\$4.4 Million

Bishop Dorsey Endowment

Degel Family Endowment Fund for Seminarians

Emmaus Endowment Fund

Priests' Retirement Fund

Prince-Olson Family Vocation Scholarship Endowment Fund

Seminarians Fund

Outreach Ministries

\$5.9 Million

Bishop Grady Villas Sr. Elizabeth Marie Stoup Endowment Fund

Bishop Thomas G. Wenski Endowment Fund for Charity

Catholic Charities Endowment Fund (AIC)

Catholic Charities of Central Florida, Inc. Endowment Fund

The Hackl Family Endowment for Charity



Scan here to learn more about endowments

Endowment Funds

(as of June 30, 2022)

Parish Life

\$15.1 Million

Albert J. and Christine M. Hackl Endowment Fund for the benefit of Holy Spirit Church

All Souls Catholic Church Capital Improvement Fund

All Souls Catholic Church Endowment Fund

Annunciation Catholic Church Endowment Fund

Ascension Catholic Church Endowment Fund

Basilica of St. Paul Endowment Fund

Blessed Sacrament Catholic Church, Clermont Endowment Fund

Blessed Sacrament Catholic Church, Cocoa Endowment Fund

Blessed Trinity Catholic Church, Ocala, Endowment Fund

Blessed Trinity Catholic Church, Orlando Endowment Fund

Church of our Saviour Endowment Fund

Church of the Epiphany Endowment Fund

Church of the Nativity Endowment Fund

Corpus Christi Catholic Church Endowment Fund

Divine Mercy Catholic Church Endowment Fund

Endowment Fund of the Basilica of Mary Queen of the Universe Shrine

Fred Enck Justice Ministry Endowment Fund

Holy Family Catholic Church Endowment Fund

Holy Name of Jesus Catholic Church Endowment Fund

Holy Spirit Catholic Church, Lake Wales Endowment Fund

Holy Spirit Catholic Church, Mims Endowment Fund

Immaculate Conception Catholic Church Endowment Fund

Immaculate Heart of Mary Catholic Church Endowment Fund

Kathryn M. Goggin Endowment for Marian Devotion

Most Precious Blood Catholic Church Endowment Fund

Our Lady of Grace Catholic Church Endowment Fund

Our Lady of Hope Catholic Church Endowment Fund

Our Lady of Lourdes Catholic Church, Daytona Beach Endowment Fund

Our Lady of Lourdes Catholic Church, Melbourne Endowment Fund

Our Lady of the Springs Catholic Church Endowment Fund

Our Lady Star of the Sea Endowment Fund

Prince of Peace Catholic Church Endowment Fund

Queen of Peace Catholic Church Endowment Fund

Resurrection Catholic Church Lakeland Endowment Fund

Resurrection Catholic Church, Winter Garden Endowment Fund

Sacred Heart Catholic Church Endowment Fund

St. Andrew Catholic Church Endowment Fund

St. Ann Catholic Church, Debary Endowment Fund

St. Ann Catholic Community, Haines City Endowment Fund

St. Anthony Catholic Church Endowment Fund

St. Augustine Catholic Church Endowment Fund

St. Brendan Catholic Church Endowment Fund

St. Catherine of Siena Catholic Church Endowment Fund

St. Charles Borromeo Catholic Church Endowment Fund

St. Faustina Catholic Church Endowment Fund

St. Francis of Assisi Catholic Church Endowment Fund

St. Isaac Jogues Catholic Church Endowment Fund

St. James Cathedral Endowment Fund

St. John Neumann Catholic Church Endowment Fund

St. John the Evangelist Catholic Church Endowment Fund

St. John Vianney Catholic Church Endowment Fund

St. Joseph Catholic Church, Orlando Endowment Fund

St. Joseph Catholic Church, Palm Bay Endowment Fund

St. Joseph Catholic Church, Winter Haven Endowment Fund

St. Joseph, Lakeland, Catholic Church Endowment Fund

St. Jude Catholic Community Endowment Fund

St. Margaret Mary Catholic Church Endowment Fund

St. Mark the Evangelist Catholic Church Endowment Fund

St. Mary Catholic Church Endowment Fund

St. Mary of the Lakes Catholic Church Endowment Fund

St. Matthew Catholic Church Endowment Fund

St. Matthew Catholic Church Endowment Fund (OCA)

St. Maximilian Kolbe Catholic Church Endowment Fund

St. Patrick Catholic Church Endowment Fund

St. Paul Catholic Church Endowment Fund

St. Peter Catholic Church Endowment Fund

St. Philip Phan Van Minh Endowment Fund

St. Stephen Catholic Church Endowment Fund

St. Teresa Catholic Church, Titusville Endowment Fund

St. Theresa Catholic Church, Belleview Endowment Fund

St. Timothy Catholic Church Endowment Fund

St. Vincent de Paul Catholic Church Endowment Fund

Sts. Peter and Paul Catholic Church Endowment Fund

Reserve Funds

(as of June 30, 2022)



Catholic Education \$10.5 Million

Annunciation Catholic Academy
Capital Reserve Fund

Bishop Moore Catholic High
School 3-5 Year Reserve Fund

Coto Family Fund

Father Joseph Nolan Education
Reserve Fund

Fr. Paul Kamide Fund for the
Epiphany Help Center

Hall Family Tuition
Assistance Fund

Holy Family Catholic Church
3-5 Year Reserve Fund

John Kevin Doyle Fund

Perrault Family Fund

Robert J. Peterson Memorial
Endowment Fund

St. James Cathedral School
3-5 Year Reserve Fund.

Trinity Catholic High School
3-5 Year Reserve Fund



Parish Life \$15.1 Million

Blessed Trinity, Ocala
3-5 Year Reserve Fund

Charles "Chuck" Murray
& Elizabeth "Betty" Murray
Fund for Centro Guadalupano

Church of Our Saviour
Quasi-Endowment Fund

Resurrection Catholic
Church, Lakeland Quasi
Endowment Fund

St. Margaret Mary Catholic
Church 5+Year Capital
Reserve Fund

St. Mary of the Lakes
Quasi-Endowment Fund

St. Matthew
Quasi-Endowment Fund

St. Thomas Aquinas
3-5 Year Reserve Fund

St. Thomas Aquinas Catholic
Church 5 + Year Reserve Fund

The St. Stephen Catholic
Community 5+ Year
Reserve Fund

The St. Stephens Catholic
Community 3-5 Year Reserve



Church Leadership and Development \$516,737

CFOCF 3-5 Year
Cash Reserve Fund

CFOCF 5+ Year
Cash Reserve Fund

Deacons 5+ Year
Reserve Fund

Clerical Life \$63,263

Seminarians – Dorsey
(INT POOL)

Seminarians – Other
Quasi Endowment

Outreach Ministries \$1.6 Million

Bishop Grady Villas
Temporarily Restricted Fund

Blessed Trinity Ocala
Reserve Fund for Brother's
Keeper Ministry

The Affordable Housing Fund

The Shepherd's Fund
(INT POOL)

Community Support Grants

Marian Contest

The annual Marian Essay Contest, provided through The Catholic Foundation's Father Frank Zammit Endowment Fund, provides students with the opportunity to deepen their devotion to the Blessed Mother and better understand their own role as disciples and stewards of God's grace. In 2022, 65 middle school students submitted faith-filled entries which were beautiful expressions of these students' devotion to the Blessed Mother, the model disciple and listener.



Tiary Larson Correa, was an 8th grade student at St. Anthony Catholic School in Lakeland. While Tiary had the option of using the award for her own continued faith formation, she made the generous choice to donate her \$1,000 scholarship award to St. Anthony School's art program. She shared that the school has many talented students, and she wants this award to help them develop their skills.

Congratulations, Essay Winners!

Overall 1st Place: Tiary Larson Correa, St. Anthony Catholic School

Top 7th/8th Grade Entry: Sarah Zobel, Annunciation Catholic Academy

Top 5th/6th Grade Entry: Marie Isabela Gurley, St. Mary Magdalen Catholic School

Honorable Mentions:

Aixa Anderson, St. Paul Catholic School; Charlotte Arenth, Resurrection Catholic School;
Lauren Bennett, Annunciation Catholic Academy; Ethan Dunn, St. Mary Magdalen Catholic School; Andres Montenegro, Resurrection Catholic School

GIVING TUESDAY

Giving Tuesday

448 Gifts \$104,000

(76 parishes, schools and ministries served on Giving Tuesday)

St. Katharine Drexel Society

St. Katharine Drexel Gifts

63 members..... \$146,900
(July 1, 2021 – June 30, 2022)

The St. Katharine Drexel Society recognizes donors whose annual financial support for The Catholic Foundation helps us elevate philanthropy in Central Florida. Thank you!

Anonymous (4)	Elisha Gonzalez and Kevin Bonnewitz	Bill and Jody Orosz, Jr.
In honor of Sister Maria Teresa Acosta, SCTJM	Michael and Lynn Green	Stephanie Patel
Nathaniel Bernardo	Christopher Hendrix	+Robert Rainey
Kevin and Jennifer Bowler	Susan Hunt	Elsa Reyes
Dr. Pasqual and Jessica Bracero	Kevin and Amanda Johnson	Timothy and Kimberlee Riley
Bernadette Carney	John Kancilia	Louis Rivera
Tom and Peggy Chandler	Allan and Linda Keen	Hector and Gloria Sanchez
Bill and Roswitha Chepolis	Dr. Robert and Judy Kryger	Randall and Christine Scott
Joseph Cope	Ronald and Patricia Lantzy	Rick and Marlys Strube
David and Carolyn Ell	Robert and Wendy Mara	Dana Swanson
Orlando and Carolyn Evora	Norman and Linda Martin, Jr.	John and Marta Sweeney
Victor and Nydia Figueroa	Alan and Judy Mathews	Cliff and Lucille Taylor
Paul Flaig	Carmine and Diane Mattia, Jr.	Deacon Gary and Patricia Tester
Diana Garcia	Randy Means and Carol Brinati	Rob and Wendy Thomson
Joseph and Susan Gelineau	Rodney and Kate Meyering	Timothy and Lori Tolland
Very Reverend John Giel	Nicholas and Diane Minio	Very Reverend Richard Trout
Edward Gonzalez and Maria Ceballos	Anthony and Karen Monteleone	Andrew and Madelyn Weed
	Dr. Adriana Yates Munar	Dr. Erika and Arve Wikstrom
	George Munson	Gregory Willard
	Matthew and Julie O’Kane	Diego Yangco and Rianne Sanchez
	Very Reverend Ivan Olmo	Steve and Lori Zepf



*“If we wish to serve God
and love our neighbor well,
We must manifest our joy in the service
we render to Him and them.”*

Planned Giving Advisory Council

Aaron J. Bert, CFP, AIF, CAP®

Parishioner at Annunciation
Financial Advisor
Certified Financial Group

Brendan Burke, CIMA, CRPC

Parishioner at Annunciation
Financial Advisor
The Burke/Cox Group

Garrett M. Burke

Founding Member
Parishioner at St. Mary Magdalen
The Burke/Cox Group

Darrell DeVaney, CFP, CAP®

Council Vice-Chair
Parishioner at St. Margaret Mary
Founder & Chief Wealth Architect
F4 Wealth Advisors

James Faubert, AAMS

Parishioner at St. Joseph,
Winter Haven
Financial Advisor
Edward Jones

Christopher Garcia, CFP, MBA

Founding Member
Parishioner at St. Stephen
Private Client Advisor
Charles Schwab

Kathleen Hagerty, CAP®

Founding Member
Parishioner at St. Margaret Mary
Assistant Vice President,
Gift Planning
University of Central Florida

Jaclyn Hall

Parishioner at St. Brendan
Financial Advisor
Primerica Financial Services

Alyson Hoffman, JD

Parishioner at Ascension
Attorney
Lowndes, Drosdick, Doster,
Kantor & Reed, P.A.

Amber Jade Johnson, JD

Parishioner at St. James Cathedral
Attorney at Law
Law offices of Amber Jade
Johnson, PA

Wendy Mara, JD, CAP®

Council Chair, Eastern
& Southern Deaneries
Parishioner at Prince of Peace
Principal Attorney
Mara Law, PA

Ty McCormack, CFP, AIF

Founding Member
Parishioner at St. James Cathedral
Wealth Advisor
Aksala Wealth Advisor

Gregory Meier, JD, CAP®

Parishioner at St. Margaret Mary
Attorney/Partner
Shuffield, Lowman & Wilson

Becca Noonan

Parishioner at St. Brendan
Financial Representative
Primerica Financial Services

Matthew O'Kane, JD

Parishioner of St. James Cathedral
Attorney/Shareholder
Lowndes, Drosdick, Droster,
Kantor & Reed, PA

Ryan Plank, CFP, CPFA

Founding Member
Parishioner at St. Margaret Mary
First Vice President, Financial Advisor
RBC Wealth Management

Vanessa Skinner, JD

Parishioner at St. Stephen
Shareholder
Winderweedle, Haines,
Ward & Woodman, PA

Johnny Svajko, CPA

Parishioner at Church
of the Epiphany
Certified Public Accountant
Olivari & Associates CPAs
& Consultants

**Steve Thagard, MBA, CLU,
ChFC, REBC, CFP, CAP®**

Founding Member
Parishioner at St. Margaret Mary
Wealth Management Advisor
Northwest Mutual

**Robert Thomson, CPA, PFS,
AIF, MBA, CAP®**

Founding Member, Council Chair
Parishioner at St. James Cathedral
President & Chief Investment Officer
Trivergent Trust Company

Theology on Tap Event



Central Florida CAP[®] Study Group

The Central Florida CAP[®] Study Group brings together client-facing advisors and nonprofit executives to earn the Chartered Advisor in Philanthropy CAP[®] designation provided by The American College of Financial Services. This designation indicates that a student has passed exams for the three graduate-level courses.

The Central Florida CAP[®] Study Group provides professionals from a range of disciplines with a forum to discuss ideas, experiences and coursework focused on improving philanthropy in Central Florida for generations to come. Study sessions enhance learning specifically about our region and our donors with an exchange of ideas and opportunities to meet donors and national and regional speakers.

2021 GRADUATES

Increasing Central Florida CAP[®] population by 60%

2022 COHORT



Scan here to learn more about CAP[®]

We are grateful for the support of the Edyth Bush Charitable Foundation



EDYTH BUSH CHARITABLE FOUNDATION

Vivos Christi Society

Vivos Christi Society members are generous donors who have made a planned gift to their parish, school or ministry.



Vivos Christi

LIST OF MEMBERS

New Legacy Gift Commitments

\$3,010,039

Total Matured Gifts

63

Legacy Gifts Received

\$8,029,847

30 New Members

(as of June 30, 2022)

Anonymous (4)

Joseph Bartunek

† Paul R. Belford

† Katherine June Blank

† Joan Brower-Murphy

† Arlene Callahan

John and Cathy Cascio

† Vincent Dean

† Ernestine Del Fiacco

Elizabeth Glenn

† Father Peter Henry

† Rita T. Henry

† John Joseph Huse

† Henry and Patricia Kelly

Hugo Londono

† Orlyn J. Marcus

† Louise M. Nichols

† Mary Pfaff

† Ilse Reissner

Jean Reynolds

† Carl Lee Ross

† Father Franklin Salazar

† Agnes Scannell

† Mary Agnes Shepherd

Webb Family Trust

Ramon Vega

† Edward Wojcik

Planned Giving Donor Advised Funds

The Fasano Family Donor Advised Fund*

The Vogelpohl Family Endowed Donor Advised Fund*

**These will be funded through a bequest.*

Scan here to learn how you can leave a legacy.



Vivos Christi Society and Legacy Gifts

Planned Giving Beneficiaries

Ministries (6)

Basilica of the National Shrine of Mary,
Queen of the Universe
Bishop Grady Villas/Magnify of Central Florida
Catholic Charities of Central Florida, Inc.
Diocese of Orlando - Chancery
Sister Diocese of San Juan de la Maguana
San Pedro Spiritual Development Center

Schools (6)

Annunciation Catholic Academy
Bishop Moore High School
Morning Star Catholic School
Our Lady of Lourdes Catholic School, Melbourne
St. Margaret Mary Catholic School
St. Paul Catholic School

Churches/Missions (26)

Annunciation Catholic Church
Ascension Catholic Church
Centro Guadalupano Mission
Church of the Resurrection, Lakeland
Holy Redeemer Catholic Church
Holy Spirit Catholic Church, Mims
Our Lady of the Lakes Catholic Church
Our Lady of the Springs Catholic Church
Our Lady Star of the Sea Catholic Church
Prince of Peace Catholic Church
Sacred Heart Catholic Church
St. Andrew Catholic Church
St. Anthony Catholic Church
St. Augustine Catholic Church
St. Charles Borromeo Catholic Church
St. James Cathedral
St. John the Evangelist Catholic Church
St. Joseph Catholic Church, Lakeland
St. Luke Catholic Church
St. Margaret Mary Catholic Church
St. Mark the Evangelist Catholic Church
St. Mary of the Lakes Catholic Church
St. Paul Catholic Church, Leesburg
St. Theresa Catholic Church
St. Timothy Catholic Church
St. Vincent de Paul Catholic Church



Legacy Planning Seminars

Blessed Trinity Catholic Church, Ocala
Nativity Catholic Church, Longwood
Resurrection Catholic Church, Lakeland
St. Patrick Catholic Church, Mt. Dora



Our Catholic Appeal Societies

Corpus Christi Society Members

“Body of Christ” \$10,000+ annual gift

Anonymous (5)
 Mr. Bruce Abels
 Russel and Amy Allinson
 Andrew P. Caneza Family Foundation
 Jessica and Gabriel Auffant
 Andrew and Phyllis Ayoob
 Selim and Huguette Ayoub
 Steve and Charlene Baber
 James and Deborah Balaschak
 Mrs. Diana C. Ballard
 Mr. Steven J. Bauschlicher
 Timothy and Anita Behler
 Albert and Mary Bergeron
 Joe and Carol Bert
 Michael and Melissa Bianculli
 George and Lynne Blackwood
 Nathan and Anna Bond
 Kevin and Jennie Bowler
 Eric and Cherie Brinkman
 Mrs. Mary Brock
 Michael and Jetnareth Broom
 Patrick and Beth Brown
 † Kenneth and Mary Pat Burke
 Mrs. Janet Burns
 Lisa and Jim Burrell
 James and Carrie Busbee
 Edmund and Susan Cain
 Mr. Larry and † CeCe Carroll
 Mark and Edna Carter
 Tom and Peggy Chandler
 Judd and Diamara Cheatwood
 † Mrs. Roberta Cheever
 Patrick and O’Ann Christiansen
 Anthony and Lynda Coppola
 Peter and Deborah Costello
 Estefano and Norma Crisafi
 Gary and Donna Cupal
 Ronald and Paula Davoli
 Mr. Nicholas J. Degel
 Frank and Michelle Deluca
 Mrs. Mary Demetree

Dave and Lynda Dennis
 William Dingman
 and Debra Wert
 David and Anne Dore
 James and Deborah Doyle
 Dr. Darlene Drazenovich
 Mr. Gerard W. Egel
 John and Christine Elnitsky
 Ms. Cathy Engelman
 Michael and Frederika Erdman
 Ernest and Tina Euler
 Orlando and Carolyn Evora
 Ms. Amber Nicole Farrell
 Francine M. Ferguson
 and Lance Holbert
 Ms. Elaine Fisher
 Ms. Dedora Fitzgerald
 Gavin and Annette Ford
 Brian and Dolores Franz
 Edward and Karen Gallagher
 Mrs. Shirley Geitner
 Mike and Pam Gilardi
 David and Sandra Gotwalt
 Leida Haddock and
 Robert Wright
 Mrs. Denise A. Hall
 Mr. Andrew Hannigan
 Alfred and Mary Harms
 Tony and Laura Hemgesberg
 Ron and Celeste Henkelman
 † Mr. John Higgins
 Miss Gretchen Hofmann
 Eric and Diane Holm
 Mrs. Rejeanne Hugron
 Elliott and Colleen Hulse
 Richard and Josephine
 Irumudomon
 Mrs. Heidy Jardine
 Stephen and Marva Johnson
 Mrs. Barbara Josephs
 Samuel and Constance Kaleel
 Allan and Linda Keen
 Mark and Cindy Keenan

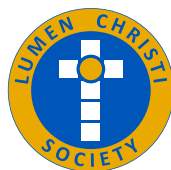
Timothy and Kathleen Kiley
 Chris and Lisa Killer
 Robert and Judy Kryger
 Chip and Ann Landon
 Anthony and Grace Liberty
 Richard and Frieda Licursi
 Douglas F. Lieb MD and Family
 Robert and Christina Light
 Mrs. Dorothy Linguadoca
 Ross and Ramona Lippert
 Liquid Capital Solutions
 (Ernane and Marla lung)
 Anthony and Lilly Lopez
 Brian and Janet Lower
 Mel and Kitty Martinez
 † Harvey and Carol Massey
 Mr. Thomas J. McCartney
 James and Melanie McManus
 Randy Means and Carol Brinati
 Joseph and Lisa Mirante
 Anthony and Janet Montore
 John and Ultima Morgan
 Larry and Lisa Mullinax
 Mr. Thomas J. Myers
 James and Mary Nealy
 Dr. Michael A. Nocero, Jr.
 Francisco and Gloria Noda
 Kevin and Mary O’Donnell
 Gerald and Marilyn Ogier
 Mark and Robin Ogier
 Mr. George O’Neill, Jr.
 Steven and Eleanor Orange
 Lusant and Mariher Ordonez
 Mrs. Miriam Ormsby
 Orosz Family Foundation, Inc.
 (Bill and Jody Orosz)
 Louis and Paulette Paradiso
 Mr. Michael A. Perry
 Mr. Richard Pesola
 Frank and Lisa Porter
 † Thomas and Selby Prince
 Terry and Jeanne Quigley

Eduardo and Sheila Rabel
 Patrick and Louise Rainey
 Jose and Pearl Ramirez
 Paul and Marilyn Rathbun
 Joseph and Madelyn Reali
 Daniel and Jill Renuart
 Melvin and Terri Riecher
 Mrs. Maria M. Rivera
 Steve and Susan Rosbury
 Phillip and Lina Ruhlman
 Parker and Christi Rushnell
 Mrs. Marilyn C. Russell
 Ms. Janice Salerno
 Joseph and Penelope Savona
 Peter and Teresa Schaefer
 John and Helen Schaffer
 Scott and Kimberly Schmitt
 Lee and Mariann Schmutde
 Anthony and Elizabeth Scott
 Richard and Janet Skipper
 Mr. Alfredo J. Solarte
 Todd and Lisa South
 David and Mary Spacone
 Randy and Andrea Squires
 Rick and Maryls Strube
 Stephen and Cindy Strube
 Steven and Jill Thagard
 Harry and Lisa Turner
 Keith and Donna Van Allen
 Robert and Stephanie Vaughn
 Dave and Ann Vogelwohl
 Ms. Theresa Wahl
 Stephen and Erin Wallace
 Phil and Barbara Warwick
 Bob and Mary Wells
 Paul and Dorothy Wewe
 Dr. Thomas Winters and
 Dr. Rebecca Moroose
 Frank and Nita Witt
 Alfred and Patricia Wyborski
 Robert and Renda Zielke
 Victor and Jaquelynn Zollo



Fidelis Society “The Faithful”

Any size gift for 5 consecutive years
17,914 Members



Lumen Christi Society “Light of Christ”

\$2,500 to \$4,999 annual gift
840 Members



Spes Christi Society “Hope of Christ”

\$5,000 to \$9,999 annual gift
274 Members

Offertory Initiative, Parish Financial Wellness

Supporting Parish Financial Wellness

Offertory Recovery and Restoration Initiative (ORRI) and Online Giving Campaign (OGC)

\$9.5 million

Total increase since
the program inception

\$536,991

Additional funds collected
by two parishes

13%

Average increase
Online Giving Donors

14%

Average offertory increase



\$1,355,415

Collected in the offertory
by participating parishes
(Oct 2021-2022)

\$152,549

Of the total offerings were
from Online Giving

10%

Average increase
Online Giving Donations

2%

Envelope response rate

Thank you to the generous stewards in these parishes

Offertory Recovery and Restoration Initiative



St. Andrew – through the OGC the parish engaged, educated and instructed parishioners in giving through their online giving portal via their parish home page or through the QR code.



Holy Redeemer – through the ORRI the parish was able to address the need of funding for continued facilities maintenance, replacement of more AC units, lighting upgrades, expansion of their faith formation and outreach ministries.

Shepherd's Fund and Our Catholic Appeal

Shepherd's Fund

235 Donors:

\$ 251,023 Pledged



Allocations for 2022 Campaign

Leadership & Parish Life – 22%

Vocations & Seminarian Education, Clergy Formation, Permanent Diaconate, Bishop's Office, Liturgy, Liturgical Music, Consecrated Life, Tribunal, Ministry to Senior Priests, Ministry to International Priests, Airport Ministry

Human Dignity & Solidarity – 14%

Magnify of Central Florida, Catholic Charities of Central Florida, Culture of Life

Education – 13%

Catholic Schools, Mission Office/Sister Diocese San Juan de la Maguana, San Pedro Spiritual Development Center

Discipleship & Stewardship – 13%

Parish, School and Diocesan Development and Advancement Services, Donor Services

Ecclesiastical Property – 10%

Cemeteries, Design & Construction, Facilities Management, Real Estate, Security

Laity, Family & Life – 8%

Children's Ministry, Family Ministry, Catholic Campus Ministry, Multicultural Ministry, Youth Ministry, Adult Ministry, Mission Integration

Financial Services – 6%

Finance, Information Technology, Parish Shared Accounting Services, Printing & Distribution, Risk Management

Human Resources – 5%

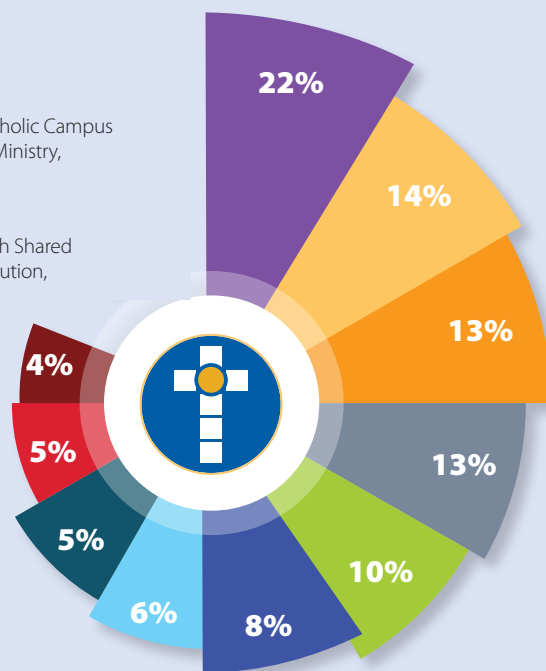
Parish, School and Diocesan Human Resource Services, Victim Assistance, Safe Environment Certification

State & National Outreach – 5%

United States Conference of Catholic Bishops, Florida Conference of Catholic Bishops

Communications – 4%

Archivist, Communications, Florida Catholic Media



2022 Appeal Goal:

\$16 million



Your gift supports every parish, ministry and school in the Diocese of Orlando

Pledges and Cash Gifts *through 12/31/2022*

\$17,883,386

111.77% of goal

34,355 donors

81 parishes at 90% or more of goal

70 of these met or exceeded goal

165 Corpus Christi Society members

Total collected through 12/31/2022:
\$17,226,303 (96.32% of pledged)

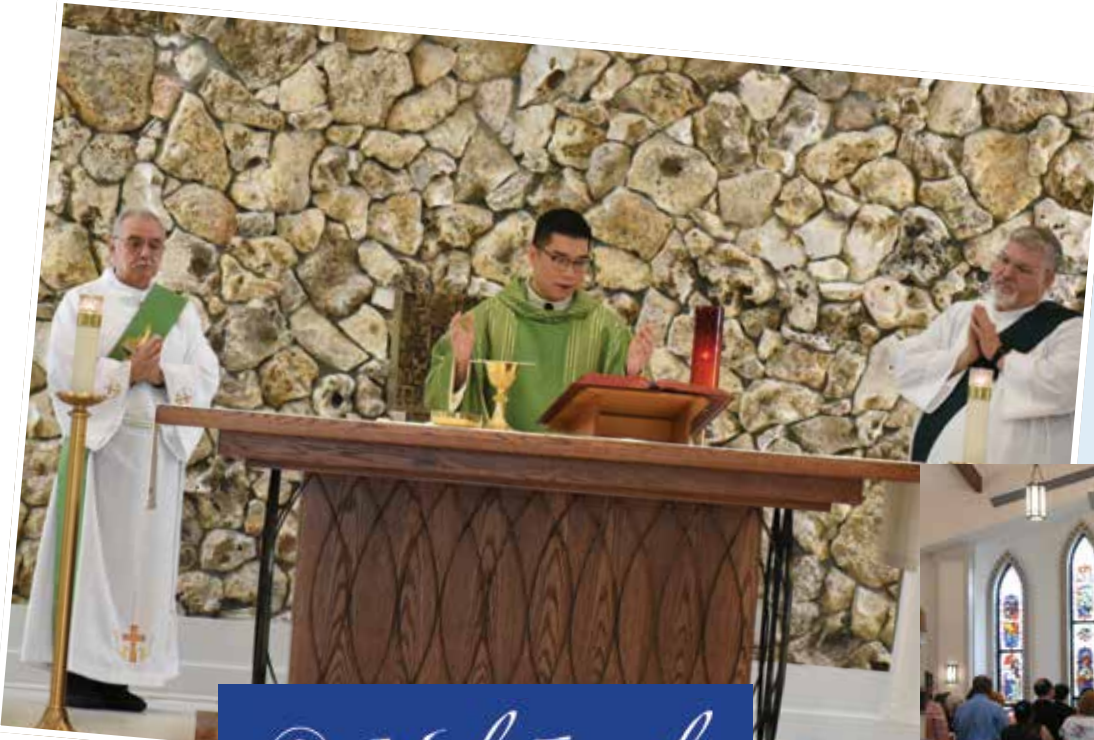
Parish Campaigns

St. John the Evangelist

**God's Heart
Our Dream 2.0.**
New portico, grotto
and stations of the cross



**Pledges and
Cash Gifts:**
\$3,256,123
(689 Donors)



Holy Family Daily Chapel

Pledges and Cash Gifts:
\$1,855,536
(509 Donors)



Thank you to the generous stewards of these parish communities

Financial Statements

Statements of Financial Position

ASSETS	June 30	
	2022	2021
Cash and cash equivalents	\$1,526,311	\$1,248,519
Investments	7,794,383	11,511,896
Investments restricted for long-term purposes	14,492,924	13,617,947
Agency funds held	66,817,893	62,910,611
Other Assets	584,237	556,028
TOTAL ASSETS	\$91,215,748	\$89,845,001
LIABILITIES AND NET ASSETS		
Accounts payable and accrued expenses	\$131,490	\$127,117
Agency obligations	66,817,893	62,910,611
Other liabilities	619,399	775,295
Deferred revenue	93,927	41,765
TOTAL LIABILITIES	67,662,709	63,854,788
Without donor restrictions		
Undesignated	909,202	817,651
Designated for donor-advised funds	521,045	307,206
Designated for other purposes	484,535	506,029
Total without donor restrictions	1,914,782	1,630,886
With donor restrictions	21,638,257	24,359,327
TOTAL NET ASSETS	\$23,553,039	\$25,990,213
TOTAL LIABILITIES AND NET ASSETS	\$91,215,748	\$89,845,001

This information is derived from our audited financial statements for the year ending June 30, 2022. A complete set of financial statements and the related footnote disclosures audited by Batts Morrison Wales & Lee, P.A. is available upon request.

Statements of Activities

PUBLIC SUPPORT AND REVENUE AND NET ASSETS RELEASED FROM TIME AND USE RESTRICTIONS	For Year Ending June 30	
	2022	2021
Development and stewardship service fees	\$1,858,416	\$1,862,350
Investment management service fees	445,127	272,653
Campaign service fees	138,300	121,328
Contributions with donor restrictions	1,228,260	1,461,166
Contributions without donor restrictions	552,167	266,879
Investment income, net - with donor restrictions	(3,304,059)	5,157,908
Investment income, net - without donor restrictions	(74,289)	51,814
Total public support and revenue and net assets released from time and use restrictions	\$843,922	\$9,194,098
EXPENSES		
Program activities		
Community Services	1,224,722	1,319,489
Grantmaking and managing charitable funds	980,457	1,109,014
Donor services	394,565	425,023
Total program activities	2,599,744	2,853,526
Supporting activities		
Management and general	662,439	505,117
Fundraising	18,913	18,462
Total supporting activities	681,352	523,789
Total expenses	3,281,096	3,377,105
CHANGE IN NET ASSETS	(2,437,174)	5,816,993
NET ASSETS - Beginning of year	25,990,213	20,173,220
NET ASSETS - END OF YEAR	\$23,553,039	\$25,990,213

Scan here for
full financial
statements.





The Catholic Foundation of Central Florida

Inspire Giving. Fund God's Work.



The Catholic Foundation is an independent 501(c)(3) nonprofit foundation committed to fostering and stewarding philanthropy to address community issues and meet the spiritual and corporal needs of our community. As a proven trustworthy philanthropic organization to give to and give through, we have received the Guidestar Platinum Seal of Transparency. Fully endorsed by the Diocese of Orlando and its Bishop, we work extensively with donors, Catholic parishes, schools and nonprofit organizations aligned with Catholic social values to maximize philanthropy and ensure resources needed to address community needs today and tomorrow.



Connect With Us!



The Catholic Foundation of Central Florida

Inspire Giving. Fund God's Work.

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407.246.4889
catholicfoundation@cfofc.org
cfofc.org