



## The Catholic Foundation of Eastern Pennsylvania

shares the belief with our donors that the institutions and ministries that best demonstrate true Catholic faith and service should live forever. The Foundation offers best-in-class intermediate and long-term investment strategies that follow Catholic values and donor intent.

As an independent 501(c)(3) charitable organization, the Catholic Foundation manages endowment and donor designated assets to generate perpetual income and provides financial stability for parishes, educational institutions and non-profits.



### Benefits of working with the Catholic Foundation

*Independent from the Diocese*

*“True” endowment funds with guidelines*

*Professional Performance & Risk Analysis*

*Institutional Investment Solution*

*Catholic Values Investing*

*Honors donor intent*

*Marketing & Fundraising Guidance*

*Perpetual Income & Financial Stability for favorite cause*

## Why leave anything to chance?

**ONE simple sentence in your will can ensure support for a Catholic cause forever.**

I give to the CATHOLIC FOUNDATION OF EASTERN PENNSYLVANIA \_\_\_\_\_ percent (\_\_\_\_%) of my estate to support the \_\_\_\_\_ Endowment Fund.

*Donors may also designate a dollar amount instead of a percentage.*

### The Catholic Foundation is the perfect repository for planned gifts.

In addition to a bequest in a will, there are a variety of charitable giving options that enable donors to provide for both their families and their favorite Catholic cause, while enjoying tax and income benefits.

The Foundation assists donors and their tax/investment advisers in customizing an endowment gift that will only support the Catholic organization or program of their choice.



## Catholic Foundation OF EASTERN PENNSYLVANIA

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## Catholic Foundation OF EASTERN PENNSYLVANIA



### Our Promise:

To ensure Catholic organizations have future income so they may fulfill their mission - *in perpetuum* - forever.

# INVEST IN FOREVER

*Endowments support the Catholic Causes Closest to Your Heart*

## What is an endowment?

An endowment is a fund that is managed and invested to create permanent self-sustaining financial support for an intended purpose. Each year, a portion of the value of the fund is distributed to support the endowment's pre-defined purpose. Any earnings in excess of this distribution continue to build the fund's market value.

### Endowment funds are important because they:

- ✚ Build a reserve for the purpose of creating a financial bedrock for a school, parish, or organization.
- ✚ Provide a repository for future donations and donor involvement.
- ✚ Create a symbol of trustworthiness and sustainability for the Catholic cause.

## Education Endowments

*provide for the future of Catholic education*

More than 80 percent of the endowments managed by the Catholic Foundation support Catholic education. Many students in the Diocese of Allentown would like to attend or remain in a Catholic school. However, family finances can make this choice impossible. Cost is the top reason cited by families who do not enroll their children in Catholic schools. Endowment funds would make the gift of Catholic education available for all.

## Parish & Catholic Ministries Endowments

*provide for the future of parish life and social service activities*

Providing support for parishes and human service ministries is an important calling for all Catholics. Weekly giving to parishes or annual giving to nonprofit organizations is a common practice to support general operations. Endowment funds are needed to ensure important parish activities and human service programs offered by Catholic causes may continue and grow. Funds created by the Catholic Foundation also provide asset protection from the liabilities of the diocese, parish, schools and diocesan ministries.



## Legacy Gifts Ensure Lasting Support

### John Paul II Center for Special Learning Endowment Fund

Following the death of his beloved wife Peggy, Jack Horrigan of Reading established the John Paul II Center for Special Learning Endowment Fund.



“Peggy and I were long-time supporters of John Paul II Center. This endowment fund in Peggy's honor will provide financial assistance to the students of John Paul II so they may reach their God given potential for many years to come.”

*- Jack Horrigan*

### Scalici Family Fund

Leadership, volunteer involvement and passion are the key factors that led Tom and Amy Scalici of Allentown to start an endowment fund with the Catholic Foundation. The Scalici Family Fund supports three worthy Catholic causes: St. John Vianney Regional School, the Mercy School for Special Learning, and Catholic Charities.

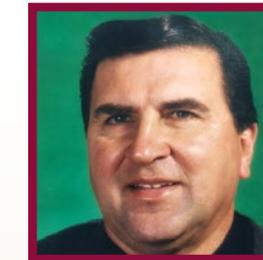


“Every Catholic institution needs funding so they may remain sustainable over the long run. An endowment fund with the Catholic Foundation provides consistent annual funding that will support an organization in perpetuity.”

*- Tom Scalici*

### St. Joseph the Worker Parish Endowment Fund

When the Catholic Foundation started, Monsignor Robert Wargo, pastor of St. Joseph the Worker in Orefield, saw the opportunity to open a parish endowment fund and three other program funds to ensure the financial future of the parish. He worked with his parish finance council to set up the four funds. The funds are growing and generating annual income to fund parish and school programs.



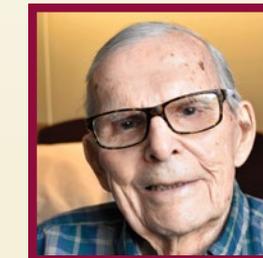
“A pastor's job is to work with parish lay leaders to make sure the parish is in good financial state. It's important to have income for the future so we may carry on the mission of Christ.”

*- Monsignor Robert Wargo*

### Albert J Neupauer Education Endowment Fund

Exactly one year before his death, Albert Neupauer signed an agreement with the Catholic Foundation to establish the Albert J. Neupauer Education Endowment Fund. He wanted to provide young people at Holy Trinity parish in Whitehall the opportunity to attend a Catholic high school in the Diocese of Allentown.

His initial gift of \$50,000, funded through a donation of stock, put the scholarship endowment in place. Then, as part of his estate plan, he named the Catholic Foundation in his will with instructions to support the endowment fund that bears his name.



“Al was a man of deep faith. He saw this scholarship endowment as a way to teach the Catholic faith and values to our young people by making Catholic secondary education affordable for families in our parish.”

*- Monsignor Daniel Yenushosky*

## START a new fund or DONATE to an existing fund with:

- ✚ Cash
- ✚ IRA transfer (Age 70.5)
- ✚ Appreciated Securities
- ✚ Insurance or Investment Beneficiary