

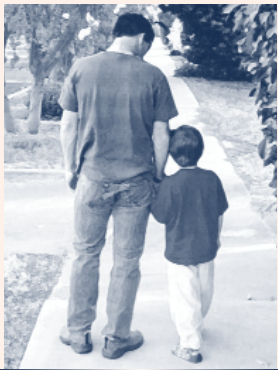
# FOUNDATIONS

*To carry on the work of Christ by fostering philanthropy*

Visit our website: [www.ccphx.org](http://www.ccphx.org)

Fall 2004

## ARCHITECTS



What legacy will you leave?  
Future generations may recall what you built.  
What you made. What you said.  
But will they remember what you did to make a difference?

### LEAVE A LEGACY<sup>®</sup> 2004 Survey: Charitable Bequests on the Rise

The mission of LEAVE A LEGACY Arizona, an initiative of the Planned Giving Round Table, is to increase the public's awareness of planned charitable gifts and bequest opportunities that can benefit their local communities. In 1999, the organization conducted a research study to assess the status of charitable giving in Arizona, and in May 2004, it conducted a follow-up survey.

The 2004 survey researched the charitable giving patterns of 504 participants. The reason they most often stated for giving was that the contributions stayed in their local community. Seventy-three percent of those surveyed planned to make a financial contribution in the next year, and it was important for them to know what their contributions will achieve. Sixty-seven percent of the survey's respondents believe that their charitable gifts make a difference. The three causes most important to survey participants remained the same as the in

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## BUILDERS



### Foundation grants touch those causes important to you

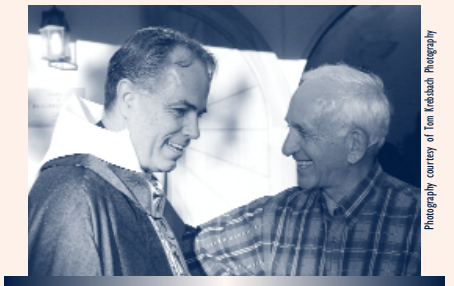
Since 1985, the Foundation has provided more than \$3.7 million in grants to support Catholic schools, communication programs, and Christian formation & education in the Diocese of Phoenix. Last year, the Foundation awarded \$455,000 in grants that were made possible through the generosity of donors, both living and deceased, who have entrusted the Foundation to administer their funds to meet many of the needs of the Diocese of Phoenix and its people. In addition, the Foundation manages a number of restricted funds, for which donors designate a specific cause they would like to support.

Maggie's Place is one example of an organization that has benefited from a restricted grant. It provides a welcoming home for pregnant women who are alone or out on the streets. Once a woman's immediate physical and emotional needs are met, the staff at Maggie's Place connects her with agencies and resources that can help her secure prenatal care, health insurance, low-cost housing and other essentials.

Since opening in 2000, Maggie's Place has helped

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## ARTISANS



Fr. Michael Straley and John Reyno, Foundation Chairman visit after Mass during the retreat.

### Foundation's Leadership Retreat Offers "Bread for the Journey"

On August 27-29, the Foundation's staff and board members headed north to Flagstaff to attend a Leadership Retreat. The weekend of prayer, reflection, discussion and presentations was designed to provide a productive setting in which to chart the future direction of the Foundation. Sponsors of the event included John & Edie Reyno, Jack & Mary Jean Bublitz, and Marshall & Ilsley Trust Company.

The Reynos graciously welcomed the retreat attendees at a reception at their home on Friday evening. On Saturday morning, the group convened at the historic Colton House. The Most Rev. Thomas J. Olmsted, Bishop of Phoenix, spoke to the group on the importance of living a stewardship way of life out of love for Christ. His discussion focused on the topics of gratitude, accountability and hospitality. He spoke of the selfless work of Mother Teresa of Calcutta and explained, "One thing motivated Blessed Teresa: grateful love for Jesus, awe and wonder at the gift of Him." The Bishop opened and closed his remarks by reminding those present that "An encounter with the living Christ transforms a person's life."

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## ARCHITECTS

1999 survey: children and youth, the elderly, and the disabled.

Results of the 1999 survey showed that 8% of the respondents had made a provision in their will for charitable bequests. The 2004 survey, however, showed that 10% of the respondents had made such a provision in their will - a 25% increase. Most significant of all is the financial impact of this increase. According to the implications of the survey, an additional 42,000 households had made charitable bequests since 1999, representing \$1.5 billion in donations. Assuming that 70% of these donations are made to Arizona charities, this increase in philanthropy means that \$1 billion has been added to the charitable bequest pipeline in Arizona since 1999. It's not difficult to imagine how many good works will be accomplished as a direct result of the thoughtfulness and generosity of these individuals.

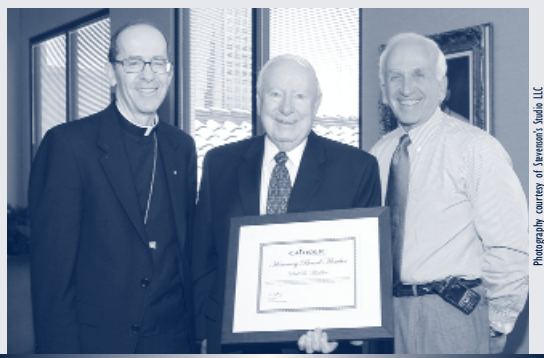
Leaving a legacy can be as simple as changing a beneficiary on a life insurance policy or as complex as directing that a variety of charitable causes receive funds for specific purposes. For more information on how you can leave a legacy of your faith, visit the Foundation's web site at [www.ccfphx.org](http://www.ccfphx.org) or contact Tom Thieken, director of planned giving at 602-354-2401 or [tthieken@ccfphx.org](mailto:tthieken@ccfphx.org).

## BUILDERS

over 100 women. Christy DeMuro, the organization's co-founder and Director of Development, explained, "We challenge the Moms to set goals and we help them along the way. Unfortunately, we continue to turn away pregnant women in need, so we're working on opening another home in Tempe."

"The grant from the Catholic Community Foundation has helped us enormously," she commented. "We depend on the generosity of the people in the community to keep us going. That frees us up to do the work of helping the Moms."

For more information on the Foundation's Grants Program, visit [www.ccfphx.org](http://www.ccfphx.org).



Photography courtesy of Stevenson's Studio, LLC

### Paul Madden Honored for Service to Foundation

He also reflected upon the great potential the Foundation has for future growth. "I truly believe that having a goal of \$100 million in the Foundation is not beyond the realm of possibility over the years. I've always believed that there are a good number of people who are willing to give, but they're not necessarily willing to give money that is going to be immediately spent. The concept of giving money as a gift where the principal is going to remain at the Foundation and where it's going to be earning interest or dividends and it's going to be there 50 years from now earning dividends or interest is much more appealing to people who want to give money to the Church."

To commemorate Paul's status as an Honorary Board Member for Life, Bishop Thomas Olmsted and Foundation Chairman John Reyno presented him with a framed certificate.

## ARTISANS

Other guest speakers at the retreat included Alan Sears, President of the Alliance Defense Fund, the nation's largest religious liberty legal alliance. Joe & Sheri Atteridge of Inside Results, LLC gave a presentation on "Unlocking Your Talents to Achieve Bold Goals." Inside Results is a consulting firm specializing in creating cultural change for organizations seeking to improve their performance. Later that afternoon, The Rev. Michael Straley, Pastor of St. Bernadette Parish in Scottsdale, celebrated the Eucharist in the Chapel of the Resurrection of the Ad Deum Retreat Center. Recording artist Julie Carrick shared her time and talents by performing the liturgical music for the Mass.

On Sunday morning, Dan Conway, Senior Vice President of the RSI Catholic Services Group in Dallas, Texas, spoke to the group on the topic of "Shaping Our Vision for the Future." Dan is an experienced planning facilitator who has worked with Catholic dioceses, seminaries and religious communities throughout the United States.

Feedback from the retreat's participants indicated that they felt that the weekend was time well spent. One participant said, "I could have listened to the Bishop all day. His critical points of gratitude, accountability and hospitality give us true direction as a serving board and as individuals. He built the model of a good steward being a person of prayer in total trust in God and the gifts he has given us."

Another participant commented, "I was very satisfied that it was conversation worth having. The retreat was bread for the journey."



Photography courtesy of Tom Krebsbach Photography

Foundation Board Members  
Front Row: Andy Groseta, Mary Jean Bublitz, Ann DeFrancesco, Terry Krebsbach, Denice Ward Hood, Cindy Ketcherside, Betty Bool and Frank Nageotte, Back Row: Jim Grenier, Andy Sherwood, Wally Delecki, Frank Brady, John Reyno, Don Ruff and Dan Santy.



Photography courtesy of Tom Krebsbach Photography

Board Members including Andy Groseta and John Reyno discuss some of the points made during the strategic planning process.



Photography courtesy of Tom Krebsbach Photography

Members engage in active participation during Sunday's visionary session.



Photography courtesy of Tom Krebsbach Photography

Julie Carrick and husband Kurt perform music for the Mass.

New Logo



Old Logo



### A New Look...for the Foundation's Future

Regular readers of Foundations will notice that the newsletter has a new look. To celebrate the creation of the Foundation's new mission statement, "To carry on the work of Christ by fostering philanthropy," a new logo was commissioned. The new design, which features a crucifix as the "T" in CATHOLIC, reinforces the Foundation's commitment to keeping the work of Christ as the central focus of every planned giving endeavor. The new look also celebrates another significant event that occurred this past year. The Foundation became recognized under the Canon law of the Catholic Church as an autonomous, pious foundation governed by leaders from the Catholic lay community.



2004 Scholars, Left to Right: Taylor Dennis, Shauna Casey, Lauren Senior, Kelsey Bohman, Kimberly Roland, Adrianna Amato, Danny Soulsby and Nick Restrepo. Brian Close was unable to attend the event.

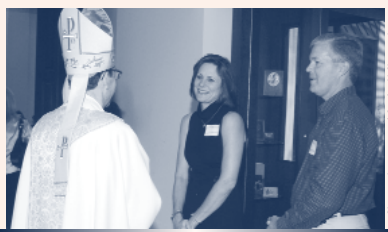
### Christian Service Scholarship Application Process Underway

Each year, the Foundation awards Christian Service Scholarships to deserving eighth grade students who demonstrate their Christian values through service to their parish, school, and local community. In 2004, an important change was made to the application process. Students interested in applying for a scholarship must now first be nominated by a teacher, principal, pastor, or other community service representative to qualify to submit a scholarship application.

The deadline for nominations for the 2005 awards was October 1, 2004, and over 60 nominations were received by that date. Students who were nominated now have until November 1 to submit their applications. The applications will be evaluated by the 12-member selection committee chaired by Denice Ward Hood. The names of the scholarship recipients will be announced in March and the scholarships will be presented by Bishop Thomas Olmsted at a special reception at the Diocesan Pastoral Center in April. They will each receive an \$8,000 scholarship to assist them in attending the Catholic high school of their choice. For more information, visit the Foundation's web site at [www.ccfphx.org](http://www.ccfphx.org).



Committee members arrive for Mass and first meeting of the year.



Lynn Donahue, Chairman with husband and board member Greg as they greet Bishop Olmsted before Mass.

### Crozier Committee Holds Kick-Off Event

The 2005 Crozier Dinner committee held its kick-off meeting at the Diocesan Pastoral Center on Wednesday, September 29th. Bishop Thomas Olmsted celebrated Mass for the group on that day which was the feast day of Sts. Gabriel and Michael the Archangels.

"It was beautiful," said Lynn Donahue, who is chairing the event. "The way the Bishop tied his message in with the angels was just gorgeous." "It was an auspicious beginning!" added committee member Colleen Will. "The Bishop's homily was so very touching, it filled me with hope...hope that I will do my job to the absolute best of my ability, and hope that our committee is united in our cause for the Catholic Community Foundation. I had the honor of touring Maggie's Place with Lynn Donahue a few weeks ago, and those women and their babies that we had the privilege of meeting were very much in mind throughout the morning." (Editor's note: See the Grants article in this issue to learn more about Maggie's Place.)

The 17th annual dinner will take place on Saturday, April 16 at the Camelback Inn, A JW Marriott Resort in Paradise Valley. The name of the entertainer who will headline the event will be announced soon. The list of performers who have entertained guests at previous Crozier Dinners includes Lou Rawls, Neil Sedaka, and Doc Severinsen.

Thanks to the hard work of Lynn and her committee members, plans are well underway to make this year's dinner a success. "We are all very excited about the possibility of making a difference in our community through the Crozier

Dinner," she said. "Recently, some committee members and I visited several of the Foundation's grant recipients. It was a great experience and a terrific reminder of why the Crozier Dinner is working hard raising money and awareness of the good work the Foundation does. In each of those visits, I felt invigorated and excited about our opportunity to make a difference." Last year's dinner raised more than \$150,000 to benefit programs such as tuition assistance for Catholic school children in the Diocese of Phoenix and the televised Catholic Mass.

Reservations for the 17th Annual Crozier Dinner can be made by calling the Foundation at 602.354.2400 or online by visiting the Foundation's web site at [www.ccfphx.org](http://www.ccfphx.org).

### Michelle Stevens, CPA Joins Foundation Staff



Photography courtesy of Dean Jereason Photography, LLC

Please join us in welcoming Michelle Stevens as our new Accounting Specialist. Michelle joined the Foundation in June of 2004 and has over eight years experience in accounting, financial analysis and financial reporting. She has a Bachelor of Science degree in

Accounting from Arizona State University. Michelle and her husband Andy have a daughter who attends Pope John XXIII Catholic School and are members of Our Lady of Joy Parish in Carefree where Michelle serves on the Social Outreach Committee and teaches in the Children's Liturgy of the Word program.



Photography courtesy of Dean Jereason Photography, LLC

### John E. Reyno Named Foundation Chairman

At the Foundation's quarterly board meeting on June 9th, John Reyno was named Chairman of the Executive Committee. John succeeds Frank Brady, who was honored for his service by being presented with the Chairman's Award by Bishop Thomas Olmsted. Other appointments included Andy Groseta as Vice Chairman and Chairman of the Grants Committee, Cindy Minon Ketcherside as Treasurer and Chairman of the Finance Committee, Gregory Donahue as Secretary, and Andrew Sherwood, Ex-Officio. Committee chair appointments include Dan Santy, Marketing; Terry Krebsbach, Estate Planning; Denice Ward Hood, Christian Service Scholarship; and Betty Bool, Legacy.

## Successful Year-End Giving: Five Important Tips

It is hard to imagine the last quarter of 2004 is here. Halloween, Thanksgiving, Christmas and New Year's are getting very close. Yes, now is the time to make plans for your year-end giving. If you're like most people, you do your major giving toward the end of the year. This probably occurs for several reasons. The closing of the tax season encourages itemizers to obtain income tax deductions, a barrage of earnest appeals by nonprofits increases awareness of financial need, and many are simply predisposed to end the year by making a charitable gift.

Here are five tips to help you make the most of your year-end giving.

### 1 Calculate Your Income

Try to get a handle on your tax liability for the year. Did your unearned income increase? Did you sell anything that had increased in value? Will you owe more taxes? These factors alone may motivate you to increase your giving before December 31. In fact, you may even want to move some of your giving to this year next year to create a larger income tax deduction for yourself this year. Non-itemizers may especially find this "grouping of gifts" useful in order to take advantage of an itemized tax return every other year.

In any case, by the time you fill out your income tax return, it will be too late to make charitable gifts for the previous year. Take the time to do some planning while you still have opportunity to make a year-end gift.

### 2 Review Your Stocks

Look at the stocks you have held for more than a year. Which ones have appreciated the most? It may be prudent for you to make your year-end gift using one or more of these stocks. Here's why: If you sold the stock, you would incur capital gains tax on the appreciation. However, if you donate the stock and allow the Catholic Community Foundation to sell it, no one pays tax. You are also entitled to a charitable deduction for the full amount of the stock, just as you would if your gift was made with cash. And what's more, if you can't use all of the charitable income tax deduction resulting from the gift, you can carry it forward for up to an additional five years. Such gifts are deductible up to 30 percent of your adjusted gross income.

### 3 Consider a Life-Income Gift.

The Catholic Community Foundation offers a number of life-income plans to fit your needs. You can make a gift now, obtain tax benefits and receive income for the rest of your life. Sound too good to be true? A few minutes of your time will convince you otherwise. We can provide personalized illustrations and material to assist you and your advisors. You can also view these options on our website by selecting "Planned Giving at [www.ccfphx.org](http://www.ccfphx.org).

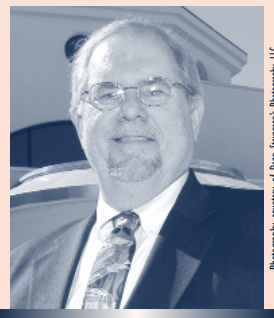
### 4 Give Your Gifts Early

This is especially true if you want to make a gift of non-cash assets such as stock, real estate, etc. It also applies to life-income gifts such as gift annuities and trust arrangements, etc. Your professional advisors and the Catholic Community Foundation are very busy as the year winds down. Remember the deadline of December 31st for charitable gifts in this tax year. The sooner you can get your gift activity going, the better it will be for everyone concerned.

### 5 Talk to Your Advisor

Before making any significant gift to the Catholic Community Foundation, or to any other nonprofit for that matter, you should have your CPA, attorney or other advisor help you understand the impact of your gift on your income tax return or estate. We at the Catholic Community Foundation want your giving to be not only generous and joyful, but also with maximum benefit to you.

Additional information on the Foundation and the many ways you can benefit your parish, school, ministry, or other charitable organizations of your choice is available on line at [www.ccfphx.org](http://www.ccfphx.org). You might consider establishing your own Personal Family Fund with a year-end gift. A Personal Family Fund is like having a "charitable savings account".



Photography courtesy of Dean Swenson Photography, LLC

For more information on the many ways in which you can create a legacy of your faith through giving, call Tom Thieken, Director of Planned Giving, for the Catholic Community Foundation at 602-354-2401 or email [tthieken@ccfphx.org](mailto:tthieken@ccfphx.org).

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To carry on the work of Christ by fostering philanthropy