



2007 Annual Report



Catholic Foundation
for the Diocese of Green Bay

A large, vertical stained glass window with an arched top. The window is divided into several panes. The upper portion features a central figure of the Virgin Mary holding the Christ Child, surrounded by a halo. Below this, the lower portion shows a seated figure, possibly a saint or scholar, holding a book. The entire window is set against a light, hazy background.

Catholic Foundation Mission

To encourage Catholic stewardship and generosity from donors through endowment funding.

10 Years of Giving

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All information as of June 30th, 2007



Dear Sisters and Brothers in Christ,

As a child growing up just outside Pittsburgh, Pennsylvania, it was always exciting when my grandmother “Porchy” and I traveled into the city for a day. Our trips would take us over the Ohio River by means of one of the many bridges in the area, all of which did the job of connecting us to the specific location we were trying to reach.

As your shepherd, one of my goals was to help in building bridges here in Northeastern Wisconsin. These bridges were not made of iron, steel and concrete but were made of trust, faith and love for the Church. My hope and prayer is that I have been able to accomplish this goal in a small way for nearly four years.

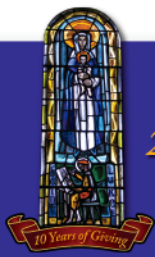
Just as I have striven to build bridges of faith here, so has the Catholic Foundation. Since my arrival in 2003, the Foundation has grown to over 120 endowment and campaign funds with assets exceeding \$50,000,000. The role of the Catholic Foundation is very similar to a bridge. Simply put, the Foundation helps families and individuals reach out to help others in need through the Bishop’s Appeal, World Mission Services collections, Catholic Charities fundraising, deferred and planned giving and other giving opportunities.

As I prepare to follow the Lord’s call again to Pittsburgh, I thank each of you for helping me build bridges of faith within the Church of Green Bay. I will certainly miss the people of Northeastern Wisconsin but will always remember you in my prayers. Pittsburgh will always be my first home; Green Bay will always and happily be my second home!

Grateful for our belief that “Nothing is Impossible with God,” I am

Your brother in Christ,

Most Reverend David A. Zubik
Bishop of Green Bay



Dear Friends,

In the Gospel of Mark there is a wonderful parable that illustrates how something very small can grow and make a tremendous difference. The mustard seed starts out as just a speck in the world but after the seed is sown it springs to life and provides shade to the birds of the sky.

In this way the Catholic Foundation started out from a small kernel of an idea ten years ago and today makes a significant difference in the Diocese of Green Bay. Over 100 different organizations have received grants and distributions over the last ten years exceeding \$3,893,000. What an impact this has had on our local Catholic parishes, schools, Diocese and other Catholic organizations.

Thank you for your faith-filled support of the Catholic Foundation! We have come a long way, seen incredible growth and will continue to have opportunities to promote Stewardship as a Way of Life and make a difference in the lives of people throughout Northeastern Wisconsin.

There is much yet to be done in our continued journey to grow the Catholic Foundation and bring the light of Jesus to thousands of people. Here are three ways you can join us in this dream:

- † We are in the midst of the greatest wealth transfer in history. Please consider remembering your parish, Catholic school, Diocese or the Catholic Foundation in your will and estate plans.
- † Consider joining the Catholic Foundation Leadership Society. This special society provides the Foundation with the resources to share our story with people throughout our Diocese.
- † If you are interested in learning more about the Catholic Foundation give us a toll-free call at 877-500-3580 ext. 8173 or e-mail us at CatholicFoundation@gbdioc.org.

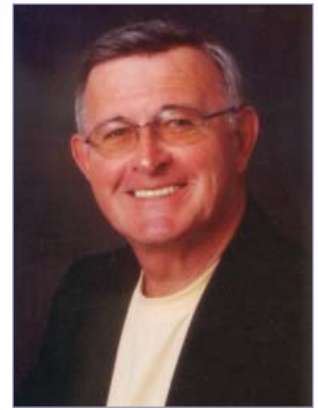
If you would like to learn more about the Catholic Foundation or opportunities to remember a charity today or in your estate plans, please visit our new website at www.CatholicFoundationgb.org.

Thank you again for your support of the Foundation over the last ten years.

Sincerely,

Bob Endries
President

Cindi K. Brawner
Executive Director



Leadership Society

The Catholic Foundation was established in 1997, to encourage stewardship, Catholic endowments and investments designed to benefit the Catholic Diocese of Green Bay, parishes and schools throughout northeastern Wisconsin.

A key to this important work happens through the support of the Catholic Foundation Leadership Society. This is a unique opportunity for people who believe in the mission of the Foundation to invest in its growth.

The Society provides funding so the Foundation can increase its presence throughout the Diocese. This in turn allows the Catholic Foundation to identify needs in our local parishes and schools and then initiate and share these solutions throughout the Diocese.

Since the Leadership Society was established in 2001 the Catholic Foundation has grown from 36 funds with assets of \$3,736,416 to 120 endowment and campaign funds with assets exceeding \$50,000,000.

You can become a member of the Leadership Society by investing \$1,000 annually. Your investment will help nurture the God-given potential of the people throughout the Diocese.



Bishop's Appeal



On behalf of the thousands of people helped by the Bishop's Appeal, thank you!

Growing up the daughter of migrant workers can be difficult at times. For Glenda, age 13, this meant traveling and meeting new people. One such person was Sr. Pat Flanagan.

"Sr. Pat has helped me with my First Communion by telling me about Jesus, how He died for us on the cross and why He died for us," said Glenda.

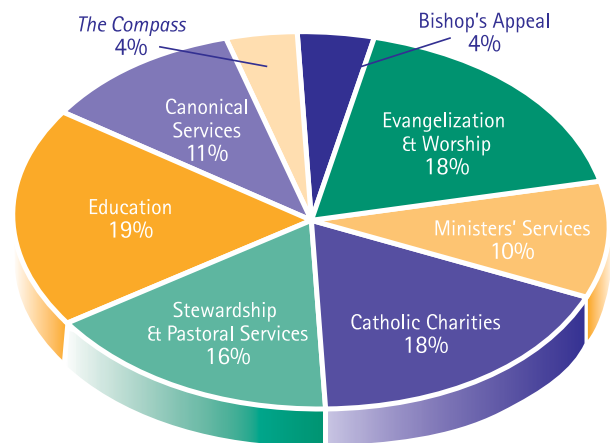
With the help of Sr. Pat and the Bishop's Appeal Glenda's dream of experiencing First Communion came true.

"Because I'm receiving the sacrament of Jesus and actually learned everything I was supposed to be taught; I know more about Jesus now. I'm receiving my First Communion and I'm receiving Jesus in my heart," shared Glenda.

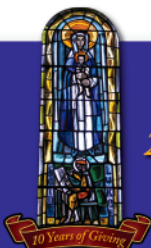
A gift to the Bishop's Appeal truly changes lives. Here are just a few of the many ministries that receive funding from the Bishop's Appeal:

- † Mental Health Counseling program
- † Marriage Preparation program
- † The Commissioned Ministry program
- † Grief Support program
- † Hispanic Ministries
- † The Diaconate Ministry

With your help the Bishop's Appeal is sharing our faith with countless people throughout Northeastern Wisconsin and beyond.



BISHOP'S APPEAL 2007 ALLOCATIONS CHART



World Mission Services

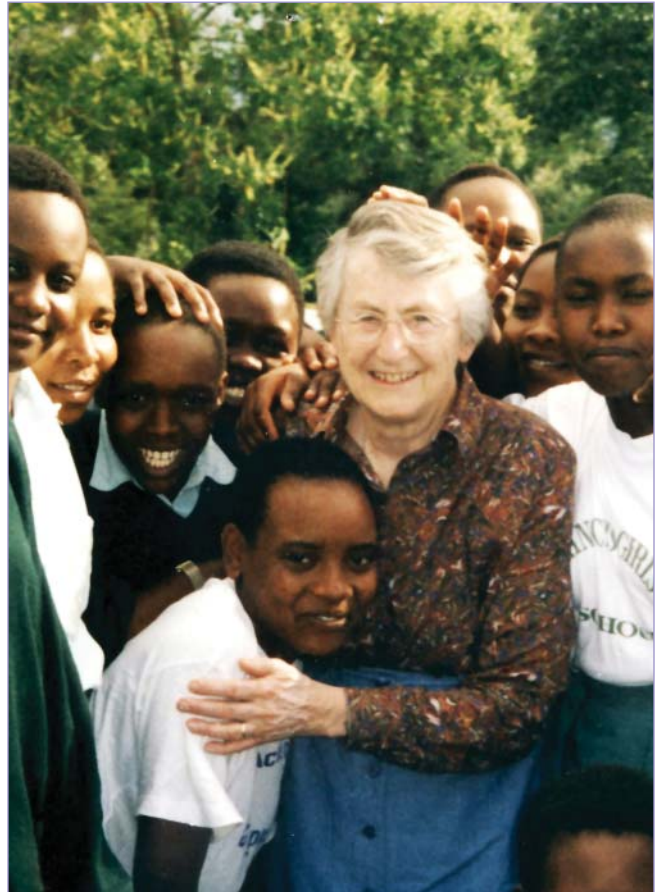
Sr. Michael Marie Laux, a School Sister of Notre Dame and a native of the Green Bay Diocese who has taught in Oshkosh, spreads the Gospel of Jesus Christ at the secondary boarding schools for girls she directs in rural Kenya.

World Mission Services promotes programs and collections that increase our awareness of global needs and allow us to help missionaries around the world while responding to our baptismal call to evangelize and assist those in need. Sr. Patricia Vanden Bergh, CSJ, whose home diocese is Green Bay, directs the Teacher Training Institute for 170 future religion teachers in the Andes Mountains of Peru.

Fr. Michael Shea, CSsR, a native of Armstrong, cares for 138 abandoned and AIDS-infected children, ages one month to 17 years, at the Sarnelli House in northeast Thailand. His ministry is possible, in part, because of Catholics from our Diocese who believe that whatsoever they do for the most needy they are doing for Jesus.

The Pontifical Mission Societies and Catholic Relief Services meet a broad spectrum of mission needs. The Missionary Cooperation Appeal and Projects Available Booklet allow groups and individuals to support the work in a specific mission.

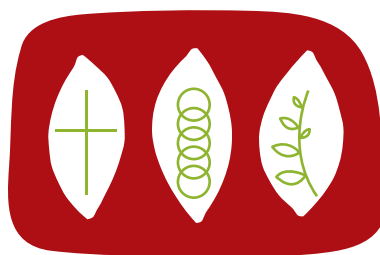
World Mission Services also promotes a Rosary Mission that ships thousands of rosaries, made by Catholics in our Diocese, to missionaries all over the world.



Advancing the Mission

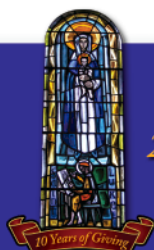
Stewardship as a Way of Life is the focal point of the Advancing the Mission campaign. Based on Stewardship of prayer, service and sharing, Advancing the Mission has energized and helped parishioners recognize God for all His blessings. The campaign addressed five key areas of need.

- † **Vibrant Parish Ministry:** We are called as individual parishes to evaluate the needs of our own parish and community and prayerfully develop a plan which will strengthen our community.
- † **Leadership Development:** Proper training is essential for our leaders. The more leaders trained, the more who will serve, the better served each parish will be.
- † **Evangelization:** Parishioners need the tools and opportunities to reach out and share the faith with others and invite them to join our Catholic community.
- † **Life-Long Catechesis:** Faith is a gift unlocked through learning. We pass down our faith to our children, but we, as adults, must also continue to learn about our faith.
- † **Priestly Retirement Care:** We are called to care for those who have committed their lives to the Church. This endowment will operate as a safety net for our retired diocesan priests' most critical needs: medical emergencies, skilled care, and other extraordinary needs.



ADVANCING
THE MISSION

In 2005, the Catholic Foundation took on this important campaign to strengthen our parishes and Diocese. As of June 30, 2007 the campaign has seen countless people engage in a deeper prayer life, over 8,000 individuals have responded to the call of service and 10,500 families and individuals have contributed almost \$22,000,000. Thank you for your support of the Advancing the Mission campaign.



Lumen Christi

The Lumen Christi fund was established in 1988 to enhance the educational needs in the Diocese of Green Bay. This is accomplished through annual support of religious education in every faith community, an annual per student contribution to every Catholic school and through tuition assistance and scholarship to those furthering their education to serve in Catholic education.

At the completion of the Lumen Christi campaign \$10 million had been raised, two million was used for the Bishop's Appeal and \$8 million was invested for the educational purposes outlined above. In the last 20 years, more than \$9 million was distributed for parish religious education programs, to Catholic schools and for the scholarships to help educate the educators. Today, the Lumen Christi fund of the Catholic Foundation is worth over \$15,000,000!

This is a beautiful example of the power of an endowment and the long term impact it provides!



The lasting impact of a charitable bequest ...

Stephen Eckes Fund



Stephen Eckes was only 54 when he died of brain cancer on Dec. 9, 2005. Steve had lived modestly — riding his motorcycle, snowmobiling, fishing and going out with the guys. He also invested wisely, setting aside more than a million dollars in 28 years from his earnings as a press operator and supervisor at Crystal Print.

Before he died, Steve took steps to ensure that his estate would benefit the religious causes he supported, especially his parish and Catholic education.

Steve asked his sister, Marilyn Borree, to turn his idea into reality. She did so by setting up an endowed trust with the Catholic Foundation for the Diocese of Green Bay and dividing it into separate funds for:

- † Projects and needs at St. John Nepomucene Parish and School, Little Chute;
- † Scholarships at Xavier High School in Appleton;
- † And various charities to be determined each year.

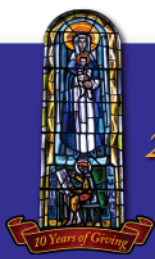
Additional money is going to a scholarship fund at St. Norbert College in De Pere.

Father Jim Hablewitz, pastor of St. John Nepomucene Parish, is deeply appreciative of Steve's thoughtfulness.

"The gift has been a very real benefit for the parish. It will continue to be quite a benefit in the future, particularly for the school and the parish, as we receive funding for special projects from that endowment annually," Father Hablewitz said. "It was a very, very generous gift and it has helped us."

Marilyn found that carrying out her brother's wishes was rewarding for her. "You feel happy that you've been able to give people something so they can meet their goals," she said.

As Stephen Eckes demonstrated, the good we do in life can continue forever.



One example of a donor advised fund making a difference ...

VITAL Youth Ministry Grant

“Our young people are leaving. We don’t know what to do.”

Sponsoring youth activities doesn’t work, so what’s the answer?

Engagement, not entertainment, says Rich Curran, former director of youth ministry for the Diocese of Green Bay.

To learn how, 270 people from 76 parishes are taking part in a two-year training program funded by a grant from the Catholic Foundation for the Diocese of Green Bay.

Every three months, at all-day VITAL Youth Ministry training, they discuss concerns, share ideas and learn to develop parish-based youth ministries that turn young people into disciples.

“As youth become involved, parishes will be able to draw on their strengths — especially in community-building and service — to strengthen the entire faith community,” said Frank Mercadante, executive director of Cultivation Ministries in St. Charles, Ill.

Mercadante teaches participants how to: build a team, reach young people, develop a mission statement, determine needs and make a matching plan.

Because the Catholic Foundation grant covers training costs, parishes may send as many people as they wish. Without the grant, most parishes could not have afforded to participate, Curran and parish representatives said.

Having the grant meant the linked parishes of All Saints in Denmark, St. James in

Cooperstown, St. Joseph in Kellnersville and Holy Trinity Mission in New Denmark, could send 27 people.

Susan Angoli, director of religious education at Cooperstown, called their efforts “scary, but wonderful. It’s all grounded in prayer. As a team we spend a lot of time in prayer. Prayer will play a large role in what the parish does,” she said.



The excitement is building, Angoli said. “We want a conversion for the whole parish and a parish-wide commitment.”

Amy Koehler, coordinator of youth ministry and middle school faith formation at Sacred Heart Parish, Shawano, said the parish hadn’t done anything in youth ministry for 11 years.

Now, they’ve written a mission statement and are developing goals and a plan to recruit and train high school peer ministers and adult leaders to work with middle school students. The goal is to tie together service, prayer, worship, fellowship and learning.

Fund Descriptions

UNRESTRICTED

Bishops Greatest Needs

The diocesan Bishop decides which areas of greatest need receive grants from this fund, which serves as the Foundation's general fund. All unrestricted gifts to the Foundation become part of this fund. Established in 1998 in honor of Bishop Robert J. Banks.

Diocesan Needs Fund

Supports the Green Bay Diocese's ongoing programs and services. Established by a generous bequest to the Bishop's Appeal.

Operating Fund

Supports the ongoing operations of the Catholic Foundation. Additional gifts are most welcome!



DONOR ADVISED

Catholic Woman's Club of Green Bay

Established to continue the heritage of giving of the Catholic Woman's Club of Green Bay.

Goldie & Ethel Derenne Fund for Charity

Established to carry on a tradition of giving to Catholic and Community charitable activities.

Stephen H. Eckes Custodial Fund

Established through a generous bequest from the Stephen H. Eckes estate to carry on charitable giving in his memory and to help Catholic organizations.

Manuel & Alice Falk Fund for Catholic Charity

Established in recognition of Manuel & Alice Falk, the parents of the donor, to carry on a tradition of giving to Catholic and community charitable activities.

Mark & Sally Follett Family Stewardship Fund

Mark and Sally Follett established this fund in honor of St. Joseph the Worker and in gratitude for their many blessings. It is part of their mutual commitment to support one another in adopting a Stewardship way of life through prayer, service & sharing.

Long Family Fund for Catholic Charity

Established by the Long Family to support a variety of Catholic causes.

Lourdes Building Fund, Oshkosh

Established for capital needs of the Lourdes High School and St. John Neumann Middle School construction and renovation project.

Our Lady Queen of Peace Stewardship Fund

Established to support Catholic and Community charitable activities in honor of Our Blessed Mother, our model of faith, hope and charity, to promote the truth and love of our Lord and to give honor to our Lord and his Mother, Our Lady Queen of Peace.

Relevant Radio Christian Outreach Fund

Helps the Starboard Network serve the mission of Jesus Christ by establishing community Catholic radio and providing relevant programming to educate, inform, inspire and build a new civilization of love.

Schierl Children Family Stewardship Fund

The children of Paul Schierl and their spouses established this fund out of gratitude for their many blessings and as part of their mutual commitment to support each other in adopting a Stewardship way of life through prayer and charitable works.

Paul & Carol Schierl Donor Advised Fund

Established to facilitate Schierl Family charitable giving for Catholic endeavors.

Arthur & Gladys Schmidt Family Fund for Needy

Assists the needy in the Diocese of Green Bay.

Schmidt Family Parish Vitality Fund

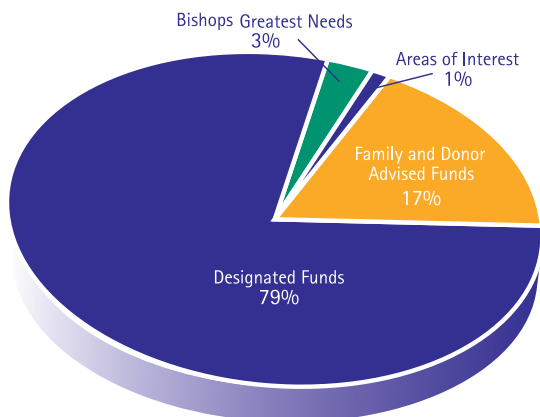
Helps parishes create programs to revitalize their parish and attract new members.

Joseph & Sarah Van Drisse Endowment

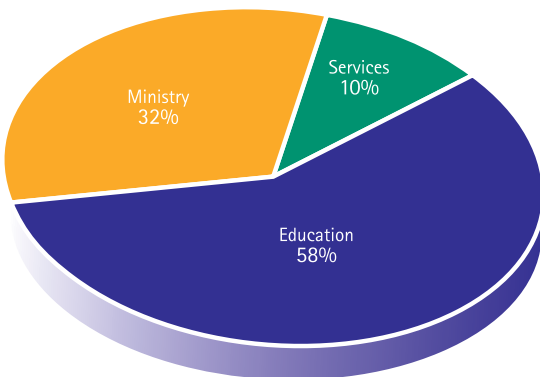
Established to honor the memory of Joseph & Sarah Van Drisse by assisting many Catholic causes in the Diocese of Green Bay.

Walter S. & Mary Ann K. Wilinski Family Fund

Established to promote charitable giving of the Walter & Mary Ann Wilinski Family.



TYPES OF FUNDS



DESIGNATED FUNDS

EDUCATION

All Saints Catholic School Endowment Fund, Antigo

Benefits students of the All Saints Catholic School System of Antigo.

Christmas Stars Scholarship Fund

Supports the fine arts programs of Appleton Catholic Education System (ACES) and Xavier High School through scholarships to ACES/Xavier students involved in the fine arts.

Christmas Stars Anna Leitermann Scholarship Fund

Established in memory of Anna Leitermann to benefit a Christmas Stars' member who is a high school senior and is enrolled in the fall college term.

Dr. James C. & Kathleen Curry Tuition Fund

Benefits Catholic elementary schools through tuition assistance to low-income, minority or other children needing aid to attend Catholic grade schools.

Father Donald Fuller Fund for Holy Angels Catholic School, Darboy

Established through a generous bequest from the estate of Father Donald Fuller. To be used by Holy Angels School as determined by the principal and the Total Catholic Education Board.

Holy Family Parish Education Endowment Fund, Brillion

Assists Holy Family Parish corporation in its mission to support total Catholic education by providing supplemental funding for programs and services.

Joseph & Mary Schindler Family Fund

Provides tuition assistance to students in need at St. Mary's Central High School in Menasha, WI.

Kaukauna Catholic School System Fund

Helps provide for the operation of the Kaukauna Catholic School System.



Lumen Christi

Established in 1988 to assist with educational needs in the Diocese of Green Bay. Provides annual support for religious education in every faith community, an annual per student contribution to every Catholic school, tuition assistance and scholarships to those furthering their education to serve in Catholic education.

Norbert Koeppel Scholarship Fund

Benefits confirmed members of St. Joseph Parish in Phlox who are pursuing post secondary education.

Notre Dame de la Baie Academy Endowment Fund

Benefits the programs and operations of Notre Dame de La Baie High School. Established by the Donald J. Long, Sr., Family.

Open Skies Education Initiative Fund

Established by Bishop Robert J. Banks to provide education scholarships to underprivileged children.

Oshkosh Unified Schools Fund

Benefits the Unified Catholic School System of Oshkosh.

Sacred Heart Tuition Assistance Endowment Fund, Oshkosh

Provides tuition assistance to needy students attending the Unified Catholic School System of Oshkosh.

*All funds will
gratefully accept
additional gifts
of any size!*

Paul & Carol Schierl Catholic School Tuition Fund

Benefits Catholic elementary schools by providing tuition assistance to low-income, minority or other children who need assistance to attend Catholic grade schools.

St. Ann's Catholic School Tuition Assistance Fund, St. Anna

Catholic School Tuition Assistance Fund for St. Ann Parish.

St. Anthony Catholic School Fund, Oconto Falls

Established for the greatest needs of the Catholic school of St. Anthony Parish.

St. Bernard Scholarship Fund, Green Bay

Assists members of St. Bernard Parish, based on academic performance, with their high school and college education.

St. John - Sacred Heart School Endowment, Sherwood/St. John

Supports St. John-Sacred Heart School through supplemental funding for education programs and services. Additional contributions are always welcome and appreciated.

St. Joseph Parish School Fund, Green Bay

Supports and assists St. Joseph Parish School in Green Bay in its mission by providing supplemental funding of programs and services and support for its operation, maintenance, capital requirements and continued existence.

St. Mary Parish Scholarship Fund, Oshkosh

Established by the Thomas Lopina Family to provide scholarships to children from St. Mary Parish who wish to attend the Unified Catholic Schools of Oshkosh and the commissioned ministry program of the Parish.

St. Mary Parish, Peshtigo, Education Endowment Fund

Assists and supports the Catholic Day school and Religious Education for adults and children by providing additional support for operations and maintenance to assure the school's continued existence.

St. Paul Lifetime Catholic Education Fund, Wrightstown

Supports and assists St. Paul Parish in its mission of providing Catholic education throughout the life spans of the Wrightstown parish community members.

St. Thomas More Catholic Education Endowment Fund, Green Bay

Established by Donald J. Long, Sr., in honor of his wife, Darlene M. Long, who received an excellent elementary school education at St. Mary of the Angels Catholic Elementary School, now part of St. Thomas More School System in Green Bay.

Edward & Margie Van De Loo Fund for Education

Created in memory of Edward & Margie Van De Loo to benefit the Kaukauna Catholic School System by tuition assistance to poor and deserving children attending the Kaukauna Catholic School System with first preference to the children of the Hollandtown area.

Total Catholic Education Endowment Fund

Established by an individual to benefit religious education programs and Catholic schools in the Diocese of Green Bay.

Xavier High School, Appleton, Scholarship Endowment Fund

Provides Catholic high school scholarships to Catholic students. Additional gifts are most welcome and appreciated.

MINISTRY

Claude P. and Bernice V. Allie Ministry Fund

Established through the Claude P. & Bernice V. Allie estates to procure and educate priests, seminarians, and lay ministers of the Church of Green Bay.

Elizabeth M. Anderle Fund

Benefits St. Mary of the Angels Parish, Green Bay, and the Bishop's Greatest Needs Fund in the Catholic Foundation.

R.J. & Bernice Baudhuin Estate for the Holy Name Retreat House

Established through the generosity of the R.J. & Bernice Baudhuin estates to benefit Holy Name Retreat House on Chambers Island.

Dr. Thomas & Louvain Beno Endowment Fund for Advancing the Mission

Supports and assists the Catholic Diocese of Green Bay in its mission by funding Leadership Development, Evangelization, Life-long Catechesis, and Priestly Retirement as the Diocese determines the needs.



Bishop Wycislo Fund for Lay Ministry Formation

Supplements funding for tuition and book costs to those in the Diocese who are in the Lay Ministry program.

Goldie & Ethel Derenne Fund for St. Louis Parish, Dyckesville

This fund is intended to build a bell tower for the parish, or to support the parish if a bell tower is not built.

Evangelization Endowment

This subfund of the Advancing the Mission campaign is to provide support for the Evangelization Department of the Diocese of Green Bay and to help support Diocesan-wide, vicariate, parish cluster and/or parish programs for worship, spirituality, sacred music, youth and young adult ministry, marriage preparation, family life, baptism preparation, campus ministry, retreat operations and activities of the RCIA programs by providing for these new evangelization initiatives.

Health & Welfare Fund of Discalced Carmelite Nuns

Established by the Premonstratensian Fathers of St. Norbert Abbey for the ongoing support of the Discalced Carmelite Nuns of the Holy Name of Jesus.

Holy Angels Stained Glass Window Endowment Fund, Darboy

Established to preserve the stained glass windows at Holy Spirit Parish, Darboy site.

Holy Angels Parish Fund, Darboy

Established for the general needs of Holy Angels Parish (now Holy Spirit) in Darboy-Kimberly.



Leadership Development

This subfund of the Advancing the Mission campaign is to provide leadership development to include priestly study for advanced degrees; recruitment and education for deacons; assist in the education of seminarians toward ordination; recruitment and education of new parish directors; and to promote and support lay ecclesial vocations such as parish associates, religious education directors, parish business managers, youth ministers and any other lay ecclesial ministries.

Life-long Catechesis

This subfund of the Advancing the Mission campaign is to provide for life-long catechesis to include help in funding religious education at the parish/vicariate level in the form of learning materials and teaching stipends; to help Catholic schools establish tuition assistance to needy families, and to provide direct assistance to needy schools; and to help in funding the current work of the Education Department of the Catholic Diocese of Green Bay inclusive of Adult Faith Formation.

Monica Meyer Fund for the Education of Priests

Established by a generous bequest from the Monica Meyer Estate to educate priests in the Catholic Diocese of Green Bay.

Viola L. & Edmund W. Miller Memorial Fund

Established by the Viola L. and Edmund W. Miller family to benefit St. Joan of Arc Parish in Goodman, WI.

Nativity of our Lord Parish Fund, Green Bay

Established on the 40th anniversary of Nativity Parish to provide for ongoing capital improvements and maintenance of the parish buildings and grounds.

Priestly Care

This subfund of the Advancing the Mission campaign is to provide for priestly care by funding support for the welfare of the retired diocesan priests of the Catholic Diocese of Green Bay and the benevolent fund of the Leo Benevolent Association of the Priests of the Catholic Diocese of Green Bay, Inc.

St. Anthony Parish Fund, Oconto Falls

Established for the greatest needs of St. Anthony Parish.

St. Francis & St. Mary Parish Fund, Brussels

Established for the greatest needs of St. Francis and St. Mary Parish in Brussels.

St. Francis Xavier Cathedral Fund, Green Bay

Established by Darlene & Donald J. Long, Sr. for the Bishop Aloysius Wycislo Center's greatest needs. In the future, St. Francis Xavier Cathedral may use the annual proceeds for its greatest need.

St. John Nepomucene Parish & School Endowment Fund, Little Chute

Supports and assists St. John Nepomucene Parish in Little Chute in its mission by providing supplemental funding for its programs and services, or any areas of the parish's greatest need.

St. Margaret Mary Parish Fund, Neenah

Established by a generous donor to help St. Margaret Mary Parish with their greatest needs.

St. Mary Parish Fund, Oshkosh

Benefits the parish in its community outreach, for extraordinary expenses and for needs as determined by Parish leadership. Now Most Blessed Sacrament, Oshkosh



St. Mary Parish Legacy League Endowment, Menasha

Established as a permanent, growing trust to help meet long term future needs and for its financial stability.

St. Nicholas Parish Fund, Freedom

Helps the parish with its operations, maintenance, capital requirements and continued existence.

St. Paul Facilities Non-Endowed Designated Fund, Wrightstown

Provides additional support for St. Paul Parish, Wrightstown, for maintenance, capital requirements and continued existence.

Ss. Peter & Paul Parish Fund, Hortonville

Benefits Ss. Peter & Paul Parish in Hortonville.

St. Thomas the Apostle Parish Endowment Fund, Humboldt

Established by a generous bequest from a former member of Ss. Cyril & Methodius Parish, one of the two parishes that merged to form Saint Thomas the Apostle Parish, to benefit parish operations.

St. Willebrord Open Doors, Open Hearts Fund, Green Bay

Provides programming and resources to continue the parish's "Open Doors, Open Hearts" ministry of caring for its diverse population, which includes all of God's children.

Salvatorian Mission Warehouse Fund, New Holstein

Helps the Salvatorian Mission Warehouse, a volunteer-run organization, defray annual transportation costs to deliver products donated by corporations to missions in Third World countries.

Seminarians Fund

Established through a generous bequest from the Marcella T. Greuel estate to assist needy young men studying for the priesthood.

Sisters Of St. Francis Of The Holy Cross Fund, Bay Settlement

Established to meet the greatest needs of the Sisters of St. Francis of the Holy Cross.

Reverend Monsignor Carl E. Steiner Ministry Fund for Priests Sabbaticals

Assists deserving priests with their requests for sabbaticals and mini-sabbaticals.

Clarence & Dolores Wallace Endowment Fund for Mount Tabor Center, Menasha

Benefits Mount Tabor Center in Menasha, which provides retreat opportunities for youth and young people throughout the Diocese.

Peter T. Weiler Family Fund

Funds scholarships to educate needy and deserving seminarians.

SERVICES

Affordable Housing Institute

Established by the Donald J. Long, Sr. Family to enhance the availability of affordable housing and home ownership in the greater Green Bay area.

Camp Tekawitha Endowment Fund

Funds greatest needs of Camp Tekawitha, including scholarships, year-round building needs or summer programs.

Catholic Charities of the Diocese of Green Bay

Assists Catholic Charities with its many helping programs.

Jeanette K. Clark Children Services

Helps fund children's services in the Apostolate. Established through a generous bequest.

Helen Danoski Campaign for Human Development

Supplements local grants for the Diocese's Catholic Campaign for Human Development.



Stephen H. Eckes Fund for Catholic Charity
Established through a generous gift from the Stephen Eckes estate to continue Catholic charitable giving.

Grellinger Hall Fund

Supports the everyday operations, maintenance, capital requirements and continued existence of Grellinger Hall for retired priests in the Diocese of Green Bay.

Monica Meyer Respect Life Endowment Fund

Established by a generous bequest from the Monica Meyer Estate for a Respect Life Anti-Abortion Program in the Diocese of Green Bay.

Nazareth Fund

Helps children and families in the Diocese of Green Bay. Established by Bishop Robert J. Banks through a generous bequest from the Jeanette K. Clark Estate.

Regina & Dominic Olejniczak Endowment Fund

Benefits Catholic Adoption Services through Catholic Charities of the Diocese of Green Bay.

Paul's Pantry, Green Bay

Established by the Donald J. Long, Sr. Family to care for the poor served by Paul's Pantry in Green Bay.

Poor & Homeless Fund

Assists the poor and homeless of the Diocese of Green Bay. Established through a Charitable Gift Fund.

St. Agnes Parish, St. Vincent DePaul Society Fund, Green Bay

Promotes charitable giving to and support of the mission of St. Agnes Parish's St. Vincent De Paul Society Conference.

St. Mary's Hospital A Woman's Place, Green Bay

Helps fund operations or capital expenses of "A Woman's Place" drop-in center in Green Bay.

St. Patrick Parish Endowment, Green Bay

Established by the Donald J. Long, Sr. Family to care for the poor served by St. Patrick Parish in Green Bay.

Wisconsin Right to Life Education Fund, Veritas Society

Established to provide the Wisconsin general public with an extensive pro-life education to save lives from abortion and to achieve a lasting culture of life.



Circle of Hope

The Circle of Hope recognizes all those who have remembered the Catholic Foundation or the Catholic Diocese of Green Bay with a gift in their will or other estate plan. The commitment of the members of this circle is a strong sign of hope to the living. It is a lasting legacy that the Catholic tradition will be available to all future generations. Please let us know if you have remembered the Catholic Foundation or the Catholic Diocese of Green Bay, so we can thank you.

Catholic Foundation

for the Diocese of Green Bay

BOARD OF DIRECTORS

Bishop David Zubik, Diocese of Green Bay

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Marianne Van Drisse

Financial Statements

CONDENSED STATEMENT OF FINANCIAL POSITION

June 30, 2007

Assets

Cash and Investments	\$39,837,320
Gifts receivable	11,968,439
Other	469,951
	<u>\$52,275,710</u>

Liabilities

Accrued expenses	\$72,260
Custodial Funds	7,472,863
Pledges Payable	189,560
Line of credit	700,852
	<u>8,435,535</u>
Net assets	<u>43,840,175</u>

Total liabilities and net assets **\$52,275,710**

CONDENSED STATEMENT OF ACTIVITIES

Year Ended June 30, 2007

Revenues, Investment Gains & Other Support

Contributions	\$20,593,795
Management fees	110,035
Total return on investments *	3,717,552
	<u>\$24,421,382</u>

Expenses

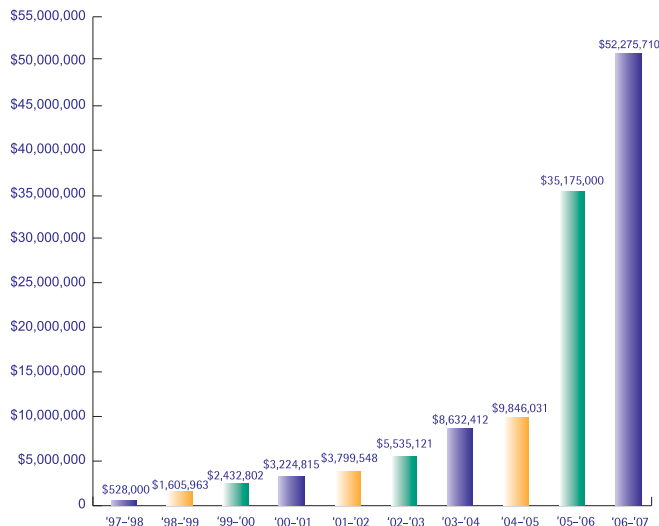
Grants **	6,177,896
Management and general	168,821
Fund raising	2,864,939
	<u>\$9,211,656</u>

Change in Net Assets **\$15,209,726**

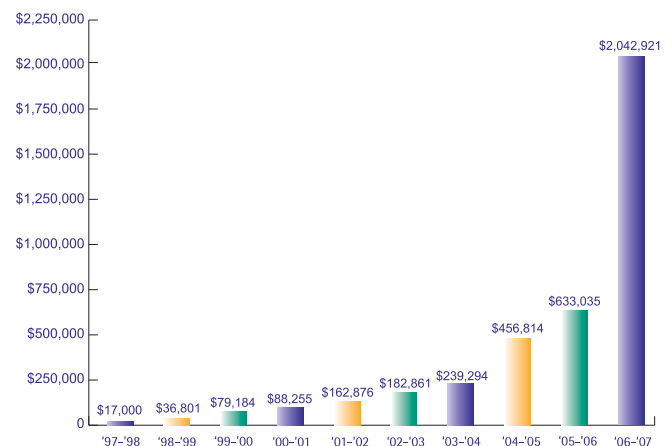
*Excludes ROI on \$7,472,863 of custodial funds. A fund with a mix of 70% stocks and 30% bonds resulted in a total investment return of 15.40%.

** Does not match total distributions due to payments from custodial funds, pledge payments and amortization of discounts.

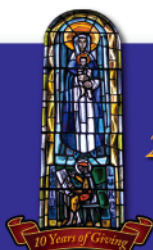
A complete audit is available upon request.



CUMULATIVE GROWTH OF THE CATHOLIC FOUNDATION



APPROVED GRANTS & DISTRIBUTIONS FROM THE
CATHOLIC FOUNDATION



Distributions 2006 – 2007

Unrestricted Funds

Appleton Catholic Education System (ACES)	\$10,000.00
Green Bay Diocesan Tribunal	\$10,075.61
Sisters of St Francis of the Holy Cross	<u>\$25,000.00</u>
Unrestricted Total	<u>\$45,075.61</u>

Education Funds

Notre Dame de la Baie Academy	\$6,414.21
Total Catholic Education Department	\$5,483.96
Xavier High School, Appleton	\$2,629.83
Appleton Catholic Education System (ACES)	\$2,628.83
All Saints Catholic Schools, Antigo	\$7,000.00
Unified Catholic Schools of Oshkosh	\$1,411.57
SS Peter & Paul School Tuition, Kiel	\$2,055.00
Holy Rosary Tuition, New Holstein	\$5,564.00
St. Joseph Parish Scholarships, Phlox	\$3,000.00
St. Anthony Catholic School, Oconto Falls	\$4,116.98
Holy Spirit Catholic School, Kimberly	\$10,295.48
Green Bay Diocese Vocations Department	\$17,745.19
Holy Family Parish, Brillion, Education	\$12,146.79
Kaukauna Catholic School System	\$28,707.83
St. Thomas More Catholic School System, GB	\$2,711.59
Anna Leitermann Scholarship to ACES recipient	\$384.67
Lumen Christi Distribution to Parishes & Schools	\$706,923.00
St. John - Sacred Heart School, Sherwood	\$2,230.18
St. Mary Parish Scholarship, Oshkosh	\$2,803.00
St. Mary Parish Education, Peshtigo	<u>\$7,469.27</u>
Education Total	<u>\$831,721.38</u>

Service Funds

St. Patrick's Parish Food Pantry Program, Green Bay	\$9,116.22
Paul's Pantry	\$10,363.25
Green Bay Diocese Catholic Charities Adoption Services	\$2,157.10
Love Life Ministry, St. Philip Parish, GB	\$2,500.00
Green Bay Diocese Catholic Charities Clinical Services	\$1,000.00
Green Bay Diocese Catholic Charities Budget Counseling	\$4,820.26
Camp Tekawitha, Shawano	\$5,844.66
Catholic Charities Family Strengthening	\$100,000.00
Green Bay Diocese Pastoral Services Hmong Ministry	\$1,500.00
Green Bay Diocese Evangelization & Worship Youth Ministry Training	\$1,662.75
Holy Spirit Parish, Appleton Community Event - Jump N Jive	\$1,000.00
St. Thomas the Apostle Newton, Hispanic Ministry	\$1,000.00
Green Bay Diocesan Bishop's Appeal	\$4,914.14
Brown County Habitat for Humanity through the Affordable Housing Institute	\$56,000.00
Major's Neighborhood Leadership Council	\$5,000.00
JOSHUA	\$10,225.00
Green Bay Diocese Pastoral Services Respect Life Ministry	\$16,812.12
St. Agnes Parish, Green Bay, St. Vincent DePaul Society	\$1,615.60
Campaign for Human Development	\$3,242.95
Wisconsin Right to Life/Veritas Society	\$6,884.31
Grellinger Hall	<u>\$17,774.97</u>
Service Total	<u>\$263,433.33</u>

**This total distribution does not reflect distributions made from the Bishop's Appeal or the Advancing the Mission Campaign.*

Distributions 2006 – 2007 (con't)

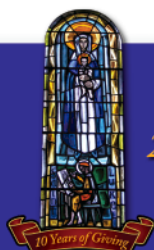
Ministry

Mount Tabor Retreat Center, Menasha	\$6,715.13
St. Margaret Mary Parish, Neenah	\$3,248.62
St. Thomas the Apostle Parish, Humboldt	\$2,358.69
Green Bay Diocesan Seminarians	\$15,888.80
Holy Spirit Parish, Kimberly	\$8,568.17
Discalced Carmelite Nuns	\$5,614.73
Ss. Peter & Paul Parish, Hortonville	\$1,341.93
Operating Fund of the Catholic Foundation	\$3,623.87
Casa Hogar Del Nino De Cabo San Lucas	\$500.00
Sisters of St. Joseph of Carondelet, St. Louis, MO	\$500.00
St. Vincent De Paul Society, Green Bay, WI	\$500.00
Sisters of St. Francis of the Holy Cross, Bay Settlement, WI	\$1,864.16
St. Louis Parish, Dyckesville, WI	\$500.00
Our Lady of the Snows, Belleville, IL	\$500.00
St. Anthony Parish, Oconto Falls	\$3,602.49
Green Bay Diocese Lay Ministry Formation	\$3,416.41
St. Francis & St. Mary Parish, Brussels	\$2,066.72
Bishop Wycislo Center at St. Francis Xavier	
Cathedral Green Bay	\$2,655.93
Holy Name Retreat House, Chambers Island	\$85,155.15
St. Mary Parish, Oshkosh	\$1,639.54
St. Joan of Arc, Goodman, WI	\$1,391.01
St. Louis Parish, Dyckesville, WI	\$3,899.30
Salvatorian Mission Warehouse, New Holstein	\$6,945.84
Rev. Carl Steiner Ministry for Priests Sabbaticals	\$1,620.51
Catholic Foundation Bishop's Greatest Needs Fund	\$948.00
St. Mary of the Angels Parish, Green Bay	\$316.00
Green Bay Diocese Diaconate	\$500.00
Green Bay Diocese Religious Education	\$500.00
St. John Nepomucene Parish & School, Little Chute	\$5,242.04
Ministry Total	<u>\$171,623.04</u>

Donor Advised Funds

Mother & Unborn Baby Care, Appleton	\$296,102.62
Green Bay Diocese Youth & Young Adult Ministry	\$15,212.97
COTS Program	\$948.00
Paul's Pantry	\$500.00
Camp Tekawitha Scholarships, Shawano	\$650.00
St. Francis Xavier Cathedral Museum, Green Bay	\$500.00
St. Louis Dyckesville Good Neighbor Fund	\$1,000.00
Salvatorian Mission Warehouse, New Holstein	\$1,000.00
St. Anthony's Parish, Neopit	\$1,000.00
Heritage Hill Bark Chapel, Green Bay	\$550.00
Love Life Program, East & West Green Bay	\$425.00
Mount Tabor Retreat Center, Menasha	\$7,000.00
Discalced Carmelite Nuns	\$1,000.00
Notre Dame de la Baie Academy	\$2,500.00
The Premonstratensian Fathers	\$15,601.10
Relevant Catholic Radio	\$11,278.13
Sisters of St. Francis of the Holy Cross	\$10,000.00
St. John Nepomucene Parish, Little Chute, WI	\$103,300.00
Diocese of Green Bay	\$5,000.00
Heart to Heart Care, Appleton	\$2,000.00
Catholic Foundation for The Stephen Eckes	
Endowment Fund for Catholic Charity	\$25,000.00
Sisters of St. Dominic, Racine, WI	\$10,000.00
Elizabeth Ministry International Resource Center	\$500.00
Catholic Foundation for the St. John Nepomucene	
Parish & School Endowment Fund	\$200,000.00
Catholic Foundation for Xavier High School	
Endowment Fund	\$20,000.00
Donor Advised Total	<u>\$731,067.82</u>
Total Distribution 2006-2007	<u>\$2,042,921.18</u>

**This total distribution does not reflect distributions made from the Bishop's Appeal or the Advancing the Mission Campaign.*



Catholic Foundation Staff

Cindi K. Brawner, Executive Director

Josh Diedrich, Assistant Director/Director of the Bishop's Appeal

Eric Blumreich, Resource Development Specialist

Shirley Bradley, Advancing the Mission

Janice M. Compton, Planned and Deferred Secretary

Debra DeGrave, Database Administrator

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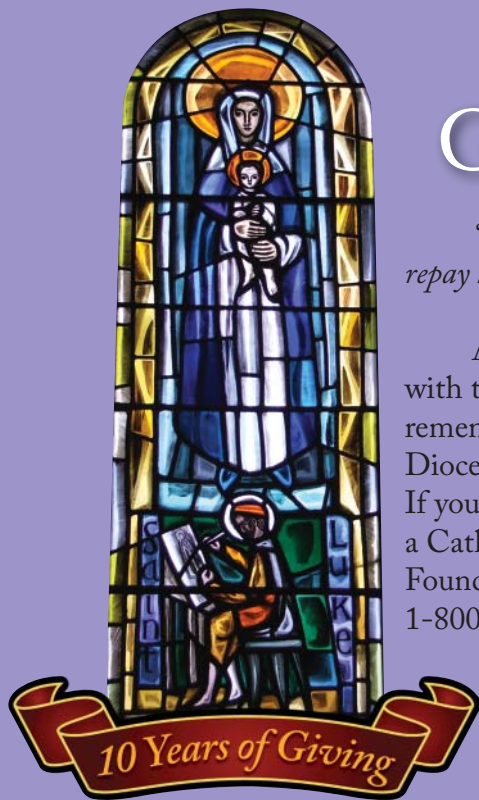
Josh Diedrich, Assistant Director

Janice M. Compton, Planned and Deferred Secretary

The Catholic Foundation for the Diocese of Green Bay, Inc. Federal Tax ID # EIN 39-1924921

The material contained herein is not intended as legal advice or a substitute for such advice. The rules and regulations governing charitable Endowments and Planned Gifts are numerous and quite complex. The Catholic Foundation for the Diocese of Green Bay, Inc. recommends that anyone planning to make a contribution seek professional counsel which may be obtained from a lawyer, certified public accountant, trust officer and life insurance and investment professional who has experience and knowledge in estate and financial planning. Your gift is tax deductible to the extent allowed by law, as the Catholic Foundation for the Diocese of Green Bay, Inc. is a Tax Exempt Organization under section 501 (c)(3) of the Internal Revenue Code, pursuant to United States Catholic Conference Group Exemption.

The Catholic Foundation
for the Diocese of Green Bay, Inc.
PO Box 22128
Green Bay, WI 54305-2128



Giving

"He who has compassion on the poor lends to the LORD, and he will repay him for his good deed." — Proverbs 19:17

As stewards we are called by God to generously share His gifts with those in desperate need of His love. Making a gift today or by remembering in your will the ministries and programs of the Catholic Diocese of Green Bay is one way to share the Lord's gifts with others. If you would like to make a gift or receive information on remembering a Catholic organization in your will, please contact the Catholic Foundation at CatholicFoundation@gbdioc.org or call toll-free at 1-800-500-3580, Ext. 8173.