



CREATING CATHOLIC LEGACIES

Making a Difference...

*“How wonderful that no one
need wait a single moment
to improve the world.”*

– Anne Frank
(1929-1945)

2013 Annual Report



Message from the Bishop



May 2014

Dear Brothers and Sisters in Christ:

It is with great pleasure that we share this annual report by the Catholic Foundation of Southwest Indiana, providing an indication of healthy growth in the establishment of endowments and distributions of interest income. In light of the notion of stewardship, this report is but one means of reflecting the Church's vitality in carrying out the various means of ministries and services throughout the twelve counties of the Diocese of Evansville.

We continue to realize ongoing growth in the Foundation, which now boasts of 467 Endowments totaling approximately \$39 million. More than being about mere numbers, this report testifies to the incredible generosity and planning of individuals and communities throughout the Diocese. As such, the mission of the Church is carried out in accordance with the mandate given it by Jesus Christ.

Once again, I want to acknowledge the fine leadership and dedication of the Foundation's Board members. These members, on behalf of all donors and recipients, take their fiduciary responsibilities very seriously. They consistently evidence a wonderful blend of financial savvy, critical thinking and dedicated discipleship to Jesus Christ.

The growth potential related to funds of planned giving remains unlimited. The realization of such ongoing growth enables us to carry out the mandate given to all baptized members of the Church; namely, to proclaim the gospel in joyful witness to Jesus Christ our Savior. In such a way, the legacy and richness of our Catholic heritage continues to draw from the foundation of *Christ the Cornerstone*.

With assurance of my prayers and best wishes for all those who share their time, talent and treasure, I remain

Sincerely yours in Christ,

Most Reverend Charles C. Thompson, D.D., JCL
Bishop of Evansville



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Todd Brock
Executive Director
tbrock@evdio.org

Irene E. Moschner
Office Administrator
foundation@evdio.org



Message from the Chairman

Dear Friends:

Thanks to God's blessings through your generous support and The Catholic Foundation of Southwest Indiana's stewardship, the Foundation's assets have continued to grow and provide beneficial resources for the Evansville Diocese and its parishioners. Our 12 county Catholic family continues to witness the good-works made possible by our generous endowment holders, and it certainly has been a blessing to play a role in this ministry.

In May of 2014 we welcomed Todd Brock as our new Executive Director after a diligent, nation-wide search. We are confident Todd will continue to grow the Foundation through his direction. Todd brings nearly two decades of experience in leadership in higher education, Catholic causes, and not for profit management.

The Foundation has continued its mission of promoting perpetual funding for Catholic organizations within the diocese; 42 new endowments were created in 2013 which brings the number of total endowments to 467 (with a total value of \$39,468,457). During 2013 the assets had a total portfolio rate of return of 16.78%, with an average rate of return over the lifespan of the Foundation to 8.4%. This year the Catholic Foundation will make over \$1,363,000 available for distribution to parishes and other Catholic organizations throughout the diocese to continue their missions.

On behalf of the Foundation I'd like to thank the many donors who have chosen to use their financial blessings to support the mission of the Catholic Church in southwestern Indiana. We are dedicated to the responsible management and long term growth of these endowed gifts. I'd also like to acknowledge the efforts of the hard working professional staff as we'll as all the pastors and parishioners who actively support us. The Board of Directors remains dedicated to protecting and growing the financial resources entrusted to us. Thank you for your continued faith in the Foundation's ability to be a steward of God's gifts.

We encourage you to visit our website at www.creatingcatholiclegacies.org to learn more about The Catholic Foundation of Southwest Indiana or call our office at 812-424-5536.

May God Bless You,

Matthew R. Atkinson
Chairman of the Board of Directors

Message from the Executive Director



Dear Brothers and Sisters,

As a young student at St. Paul's in the foothills of the Floyd's Knobs in Southern Indiana, I remember a lesson on "The Spark of The Devine". At the core of the message was that we are called to first learn to care for ourselves, which allows us to then take care of others, and then to take care of our surroundings. This message always resonated with me I suppose, because I came to realize that these efforts are born out of core principle given to us by God: To love one another as brothers and sisters, to treat each other as uniquely made by God, never to be repeated.

After embarking on this ministry, just a very short time ago, I was first struck by the outpouring of love by so many across the Diocese toward so many causes that are near and dear to their hearts. They first learned to take care of themselves, by planning and carefully tending their lives in a variety of different ways. Many different people, at many different stages in their lives, all called toward service, and fundamentally.....love.

Freedom to approach parts two and three has been achieved! Which truly is the exciting part isn't it: the part where you receive the gift of becoming an agent for positive change, and see it in the eyes and lives of others. The names on the following pages have done just that. They have taken an idea, and created action toward an end, or at least a process toward a good work. This is God working through us to love one another and care for the well-being of others and our surroundings.

I am so thankful that they have done so. There is a beauty in the action, the activity, the empathy, that they have harnessed to follow what God wants us to do, I believe that with all that I am.

But I ask myself the question every morning, what if...?

This Foundation has worked to become secure, to plan, and to become fundamentally sound in hope of becoming a unique opportunity for good within our Catholic family of 12 counties. What if we could double the size of our impact together? What would our family look like then? Could every family who wanted their children to attend Catholic schools do so? Could we virtually eradicate anyone going to bed hungry within our Diocese? Could we share the good news with all who will hear? Can we not only be a unique opportunity for good, but could we be a force to be reckoned with as evidenced by the magnitude of our love for each other?

That is why I serve this ministry, and I believe it is why our donor brothers and sisters have taken action. To answer, what if...

In Service,

Todd Brock
Executive Director

Statement of Financial Position

December 31, 2013

Assets

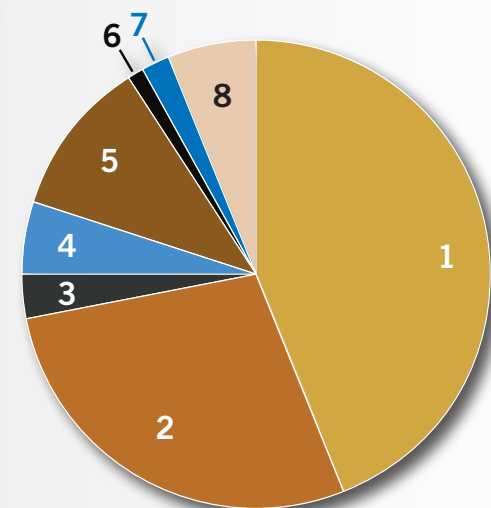
Cash	\$73,596
Accounts Receivable	
Cash Value of Life Insurance	\$38,963
Charitable Gift Annuities	\$280,015
Endowment Assets Investments	<u>\$39,468,457</u>
Total Assets	<u>\$39,861,031</u>

Liabilities and Net Assets

Accounts payable	\$13,325
Endowment Liabilities	
Distribution Payable	\$1,341,118
Endowments	\$37,791,290
Charitable Gift Annuity Liabilities	\$136,474
Equity Balances	
Endowment Fund Balance	<u>\$578,824</u>
Total Liabilities and Net Assets	<u>\$39,861,031</u>

2013 Distributions Available

TYPE OF FUNDS	NUMBER OF FUNDS	DISTRIBUTIONS AVAILABLE	% OF DISTRIBUTION AVAILABLE
1 Parish Endowments	179	\$495,265.67	44%
2 Education Endowments	158	\$312,011.47	28%
3 Religious Vocation Endowments	6	\$34,943.41	3%
4 Cemetery Endowments	30	\$59,104.21	5%
5 Human Services Endowments	35	\$119,146.98	11%
6 Priest Retirement Endowments	3	\$7,553.81	1%
7 Youth Endowments	13	\$25,577.71	2%
8 Other Endowments	7	\$62,032.25	6%
	431	\$1,115,635.51	100%



Creating Catholic Legacies

The Catholic Foundation of Southwestern Indiana gives generous people an opportunity to realize their philanthropic visions by establishing permanent gifts that will benefit the areas important to them within the Diocese of Evansville. We provide a flexible array of services that help donors shape a meaningful Catholic Legacy.

Our goal is to engender positive change in the areas of interest to our donors and to provide long term financial security to the entities within the Diocese of Evansville. An important objective is to honor and oversee a donor's wishes now and for future generations.

Above all, we make giving simple. Our donors can focus on philanthropy, without worrying about the administrative, legal or tax complexities involved in charitable giving to one or many organizations within the Diocese.

The Catholic Foundation can administer a donor's philanthropic giving, both now and after death. As a separate charitable organization, we can deliver optimal tax advantages to our donors while protecting these gifts forever. These permanent assets are invested for maximum total return and to preserve the corpus value of each endowment.

We offer donors the opportunity to make charitable contributions that are well-managed and effective, while honoring and memorializing loved ones. Our 25 member Board of Directors represents every Deanery within the Diocese of Evansville and oversees the management of over 450 permanent Endowments, Charitable Gift Annuities and Donor Advised Funds.

Endowments

as of December 31, 2013

Parish Endowments

Aaron L. Schulte for
St. Bernard, Rockport
Adelaide Rosenberger for
St. Boniface, Evansville
Albert and Doris Merkley for
Sacred Heart, Schnellville
Albert and Martin Durchholz for
Good Shepherd, Evansville
Albert and Virginia Brougham for
Good Shepherd, Evansville
Albin Family for
St. John the Baptist, Newburgh
Alfred and Magdalen Weinzapfel,
St. Philip, Mt. Vernon
Alfred and Mona Waninger for
St. Martin, Chrisney
Allen & Linda Schmitt for
St. Wendel, St. Wendel
Alvin J. "Bud" and Rita Gries, Sr.
for St. Wendel, St. Wendel
Anna E. Lubbehusen for Holy
Redeemer Parish, Evansville
Becky Schmitt for
St. Wendel, St. Wendel
Ben & Lillian Bosse for
Good Shepherd, Evansville
Bernard and Malinda Anslinger for
St. Wendel, St. Wendel
Bernard and Martha Schmitt for
St. Wendel, St. Wendel
Betty Nordhaus for
Good Shepherd, Evansville
Bill and Margaret Wallace for
St. John the Baptist, Newburgh
Bob and Diane Krug Family for
St. John the Baptist, Newburgh
Bob and Mary Lue Russler for
St. Boniface, Evansville
Candie Wagner Memorial for
St. Benedict Cathedral,
Evansville
Carl and Mildred Baumgart for
St. Wendel, St. Wendel
Carole J. Krajniak for
St. Anthony, Evansville
Charles D. & M. Pauline Robinson
for St. John, Loogootee
Charles E. & Erma Hirsch for
St. Francis Xavier, Poseyville
Charles and Erma Hirsch Memorial
for St. Francis Xavier, Poseyville

Charles R. and Betty J. Faver for
St. Philip and St. Boniface,
Evansville
Christ the King Parish, Evansville
Clinton and Henrietta Hahn
Liturgical Music for
St. Philip, Posey County
Corpus Christi Parish, Evansville
Dan and Laura Niemeier for
Resurrection, Evansville
Daniel and Betty Logel for
St. Boniface, Evansville
Daniel E. & Mary Hagerty for
St. John, Loogootee
Dave & Lou Eckerle for
St. Joseph, Jasper
Deacon David and Christine Rice
for St. John the Baptist,
Newburgh
Deacon Joe and Ginny Seibert for
St. John the Baptist, Newburgh
Dennis and Louise Mehringer for
St. Benedict, Evansville
Dr. John B. Beaven Family for
St. Joseph, Jasper
Dr. Michael & DeAnn Green for
Holy Cross, Fort Branch
Dr. Robert J. and Judy Decker
Wargel Stained Glass Windows
Maintenance for St. Mary,
Evansville
Donna J. Schmitt for St. Wendel,
St. Wendel
Earl E. and Mary Darlene Pfettscher
for St. John the Baptist,
Newburgh
Ed & Mary Alice Burch for
St. John, Loogootee
Ed and Mary Greulich Family for
St. Joseph, Evansville
Edward A. Steckler and Clara C.
Steckler for St. James, Haubstadt
Ellen and William Cox for
Blessed Sacrament, Oakland City
Esther and Joseph Grannan for
St. John Parish, Loogootee
Father Gregory Chamberlin for
St. Benedict Cathedral, Evansville
Father Harold Hammerstein for
St. Benedict Cathedral, Evansville
Father John Lefler Fund for
Holy Name, Bloomfield
Father John Lefler for
St. Martin, Chrisney
Father Michael T. Madden for
St. James, Haubstadt



St. Joseph Parish Dale, Indiana

The Saint Joseph Parish Center Endowment was established by the St. Joseph Finance Commission in 2013. After years of discerning the idea of a parish endowment, the Finance Commission agreed that there is a responsibility to preserve, maintain, and improve the Parish Center for years to come. Because the Parish Center is a large facility, many people from the town of Dale and surrounding communities rent the facility for their celebrations such as weddings, anniversaries,

quinceañeras, reunions, and fundraisers. In addition, St. Joseph collaborates with many ministries with our sister parishes of St. Nicholas and Mary, Help of Christians; together a large facility is necessary for these community activities. Thanks to the large space provided by the Parish Center, we are able to come together as one family. The St. Joseph Parish Center allows us to serve the needs of our Catholic Community as well as the town of Dale and the surrounding communities.

The endowment is an opportunity to assist not only the maintenance expenses, but also to support the needs for improvements. Buildings will always require maintenance, and if they are used often, facilities require more repair and updates. Besides maintenance, we want to improve the interior and update equipment (like tables and chairs) so that the Parish Center remains attractive and competitive for our use and for those who rent it as well. The endowment allows us to prepare for the future so we can meet the needs of our community.

Father John Brosmer

Father Patrick Foster for
St. Wendel, St. Wendel
Frances C. Elpers for St. Joseph,
Vanderburgh County
Frances C. Elpers for St. Wendel,
St. Wendel
Frank E. Kern for
St. Boniface, Evansville
George & Bette Duncan for
St. Joseph, Vanderburgh County
George S. Niemeier for
St. Philip, Posey County
Gerdon & Kathryn Jones for
St. John, Loogootee
Gervase H. and Phyllis Jane Becher
for St. Joseph, Jasper
Gilbert & Aline Hummel for
Good Shepherd, Evansville
Gilbert & Beulah Mosbey for
Good Shepherd, Evansville
Gilbert and Carolyn Will for
St. Wendel, St. Wendel
Good Shepherd Church, Evansville
Good Shepherd Parish, Evansville

Gregory G. Kempf Capital
Improvements for St. Boniface,
Evansville
Harold W. Muensterman for
St. Boniface, Evansville
Harold & Della Englert for
St. Joseph, Jasper
Henry and Cecelia Fowler for
St. Benedict Cathedral, Evansville
Herb Dilger Memorial for
St. Joseph, Dale
Herbert & Maxine E. Thyen for
St. Joseph, Jasper
Holy Angels Church,
New Harmony
Holy Cross Parish, Fort Branch
Holy Family Parish, Jasper
Holy Name Parish, Bloomfield
Holy Redeemer Parish, Evansville
Holy Rosary Legacy Society for
Holy Rosary, Evansville
Holy Rosary Music Ministry,
Evansville
Holy Rosary Parish, Evansville

Holy Spirit, Evansville
Holy Trinity Parish, Evansville
Howard C. Wire Memorial for
St. Theresa, Evansville
Hubert and Betty Dowell for
St. Bernard, Rockport
Irene D. Will Endowment for
St. Wendel, St. Wendel
J. Kenneth and Marjorie Ann
DeWitt for Christ the King,
Evansville
James E. and Barbara A. Schaefer
for St. Wendel, St. Wendel
James G. Vernie & Jim Cameron,
Jr. for Good Shepherd, Evansville
Jeanne Heekin Graham for
Our Lady of Hope, Washington
Jeff & Tricia Hollander Henning
Family for St. Benedict Cathedral,
Evansville
Jim and Delores Niemeier Family
for St. Joseph, Vanderburgh
County
Jim Knapp Memorial for
St. Wendel, St. Wendel

Jim, Sue, Barry, Rob and Michelle Mead Family for Holy Redeemer, Evansville	Melvin “Dick” and Rose Fehrenbacher for St. Wendel, St. Wendel	Rual P. and Estella Cox for St. Benedict, Evansville	St. Raphael Parish, Dubois	Thomas H. and Imelda E. Sermersheim for St. John the Baptist, Newburgh	Charles and Joan Vonderheide for Sacred Heart Cemetery, Schnellville
Joe and Elvira Fehrenbacher for St. Wendel, St. Wendel	Msgr. Carl Shetler for St. Joseph, Jasper	Sacred Heart Church, Schnellville	St. Theresa Parish, Evansville	St. John the Baptist, Newburgh	Clarence and Catherine Miller Cemetery, St. Joseph, Vanderburgh County
Joe & Winnie Schu for St. Joseph Kitchen, Vanderburgh County	Msgr. Carl Shetler for St. Martin, Whitfield	Sacred Heart Church, Vincennes	St. Vincent de Paul Church, Vincennes	Thomas R. and Helen E. Miller for St. Benedict Cathedral, Evansville	Edker L. Lee Memorial for St. John Cemetery, Washington
John and Annagene Beckman for St. Benedict Cathedral, Evansville	Msgr. Carl Shetler for St. Mary, Ireland	Sacred Heart Parish, Evansville	St. Wendel Parish, St. Wendel	Urban and Betty Will Landscape for St. Joseph, Vanderburgh County	Leo “Simon” and Evelyn Paul St. Wendel Cemetery, St. Wendel
John O. and Teresa Ackerman for St. Joseph, Jasper	Msgr. Frederic A. Niehaus	Saints Peter and Paul Parish, Haubstadt	Shirley and Justin Clements Music for St. Agnes, Evansville	Vincent and Rose Adler/Becker for St. James, Haubstadt	Marvin and Mary Faye Welp for Sacred Heart Cemetery, Schnellville
John Baumgart Endowment for St. Wendel, St. Wendel	Msgr. Kenneth R. Knapp for Christ the King, Evansville	St. Agnes Parish, Evansville	Sr. Leta Zeller Memorial for St. Francis Xavier, Poseyville	Walter and Claudina Doogs for St. Bernard, Rockport	Mary Lee Allen for Sacred Heart Cemetery, Schnellville
John W. Davidson for St. Anthony of Padua, Evansville	Msgr. Oscar & Bertha Tempel for St. Benedict Cathedral, Evansville	St. Anthony Church, Evansville	Steve and Kathy Borkowski for St. John the Baptist, Newburgh	Wilfred and Frances Tieken for St. Wendel, St. Wendel	Mary, Help of Christians Cemetery, Mariah Hill
John & Joyce Buckman Family for Resurrection, Evansville	Neil & Peggy Horak Dossett for St. Joseph, Vanderburgh County	St. Anthony of Padua Parish, St. Anthony	Steve and Rose Castrale for St. Theresa, Evansville		Mt. Calvary Cemetery, Vincennes
Joseph and Cecile Effinger for St. Wendel, St. Wendel	Oscar Allen Baker & Virginia Baker for St. John, Loogootee	St. Benedict Parish, Evansville	Sylvester and Helen Stolz for St. Wendel, St. Wendel		Sacred Heart Cemetery, Schnellville
Joseph and Mariana Elpers for St. Joseph, Vanderburgh County	Our Lady of Hope Church, Washington	St. Bernard Parish, St. Bernard Rockport	The Spirit of St. Celestine, Celestine		Saints Peter and Paul Cemetery, Haubstadt
Joseph F. and Antoinette C. Hirsch for St. John the Baptist, Newburgh	Our Lady of Hope Parish, Washington	St. Boniface Parish, Evansville	Thomas & William Hirsch for Good Shepherd, Evansville	Cemetery Endowments	St. Anthony of Padua Cemetery, St. Anthony
Joseph T. and Mary Jane Theby for Christ the King, Evansville	Patricia Griggs & Joyce Harmes for Good Shepherd, Evansville	St. Clare Society for St. John the Baptist, Newburgh		Albert and Doris Merkley for Sacred Heart Cemetery, Schnellville	St. Bernard Cemetery, St. Bernard, Rockport
Katherine, Russell & Marcia Lee King Liturgical Music for Good Shepherd, Evansville	Precious Blood Church, Jasper	St. Clement Church in Memory of Mary Derr, Boonville			St. Celestine Cemetery, Celestine
Katie Rose Schmitt for St. Wendel, St. Wendel	Ralph and Loretta Koester for St. Wendel, St. Wendel	St. Clement Mass Stipend, Boonville			St. Francis Xavier Cemetery, Poseyville
Katy Rose Schmitt for St. Wendel, St. Wendel	Ray and Ann Elpers for St. Boniface, Evansville	St. Francis Xavier Parish, Poseyville			St. James Cemetery, Haubstadt
Larry Loechte for St. Joseph, Jasper	Ray and Dorothy Andrews for St. Wendel, St. Wendel	St. Francis Xavier Parish, Vincennes			St. John the Baptist Cemetery, Newburgh
Leaving our Marx Family for St. Benedict Cathedral, Evansville	Resurrection Parish, Evansville	St. John the Apostle Church, Evansville			St. Joseph Cemetery, Jasper
Linus and Eleanor Blankenberger for St. Wendel, St. Wendel	Rev. Edward P. Schneider for St. Anthony, Evansville	St. John the Baptist Church, Vincennes			St. Joseph Cemetery, Princeton
Little Flower Society for St. Theresa, Evansville	Rev. Francis Schroering Memorial for Saints Peter and Paul, Haubstadt	St. John the Baptist Music, Newburgh			St. Joseph Cemetery, Vanderburgh County
Leonard & Hallie Hirsch for Good Shepherd, Evansville	Rev. Francis Schroering Memorial for St. John the Baptist, Newburgh	St. John the Baptist Church, Vincennes			St. Joseph Cemetery Arbor, Evansville
Lorena E. Stone Memorial for the Maintenance of Holy Angels Church, New Harmony	Rev. J. Francis Bauer Memorial for St. Bernard, Snake Run	St. John the Baptist Music, Newburgh			St. Joseph Cemetery Board of Directors, Evansville
Marcia Lee King for St. Benedict, Evansville	Rev. Theodore G. Tempel for St. Theresa, Evansville	St. John the Evangelist Parish, Daylight			St. Mary Cemetery, Barr Township
Marvin and Mary Faye Welp for Sacred Heart Church, Schnellville	Rev. Joseph R. Ziliak for St. John the Baptist, Newburgh	St. Joseph Church, Jasper			St. Mary Cemetery, Ireland
Mary, Help of Christians Parish, Mariah Hill	Robert Thompson & Rev. Ted Tempel for Good Shepherd, Evansville	St. Joseph Parish, Dale			St. Matthew Cemetery, Mt. Vernon
Mary L. Koch for St. Boniface, Evansville	Robert J. and Rose Lee Cox for St. Benedict, Evansville	St. Joseph Parish, Princeton			St. Michael Cemetery, Montgomery
Mary Lou Todte Church Pipe Organ for St. Boniface, Evansville	Robert T. and Helen L. McAtee for St. John, Loogootee	St. Joseph Parish, Vanderburgh County			St. Nicholas Cemetery, Santa Claus
Mary Mundy for St. Mary, Evansville	Ron and Kathy Hollander Family Charitable Gifting Fund for Resurrection, Evansville	St. Joseph Parish Center, Dale			St. Patrick/Glencoe Cemetery, St. Peter, Montgomery
Mary Schmidt Brown for Christ the King, Evansville	Rosa Lee Steffe for St. Joseph, Jasper	St. Joseph Organ Maintenance, Jasper			St. Philip Cemetery, Posey County
		St. Mary Building and Grounds, Barr Township			St. Rupert Cemetery, Red Brush
		St. Mary Church, Evansville			St. Thomas Cemetery, Vincennes
		St. Mary Church, Ireland			St. Vincent de Paul Cemetery, Vincennes
		St. Mary Legacy for St. Mary, Huntingburg			Anonymous Endowment
		St. Mary of the Immaculate Conception, Shoals			
		St. Mary Parish Life Ministries, Evansville			
		St. Mary Parish, Sullivan			
		St. Matthew Parish, Mount Vernon			
		St. Nicholas Church, Santa Claus			
		St. Peter Church, Linton			
		St. Philip Church, Posey County			
		St. Philip Neri Church, Bicknell			



Preserving the Future of Sacred Heart, Schnellville

Many of the parishioners of Sacred Heart of Jesus have been at their parish for their entire lives. They remember their grandparents building the church and the sacrifices that they made for their farming community. During 2012, four new endowments were established for Sacred Heart Church and Cemetery in Schnellville. Many of these endowments are named for families who wish to continue the legacy that was given to them.

According to a parishioner who started two new endowments, “We are blessed to make this gift as a result of hard work and saving diligently. This represents a gift to our Lord, in support of the Catholic faith of Sacred Heart of Jesus Catholic Church.” Formally established in 1876, Sacred Heart is home to 256 families. As you admire the legacy of this church, the endowments that have been established will ensure that future generations will have the same place to call home as these families have had.

The Kyle Weis Memorial Endowment



Kyle Weis was a member of Mater Dei’s 2010 graduating class, a member of the football team and a friend to everyone. He knew the importance of being a team player and working for a common goal. As a student at Mater Dei, Kyle knew that receiving a Catholic education was made possible by generations before him because of an endowment.

Tragically, only two weeks after his graduation, he was killed in an automobile accident. The community came together to make memorial gifts and hold fundraisers. The family wanted Kyle’s legacy to live on and created the Kyle Weis Memorial Football scholarship with an endowment. Although Kyle’s life was cut short too soon, he and his family are assuring that his love of life and his love of his Catholic high school experience will significantly help the lives of others.

Catholic Education Endowments

Albert & Eleanor Hisker Memorial for St. Theresa, Evansville
Albert & Yvonne Kyncl for Marian Educational Outreach, Evansville
Allen E. Schmitt for Mater Dei High School, Evansville
Ali Carter Scholarship for Reitz Memorial High School, Evansville
Andrea K. Bullock for Holy Cross, Fort Branch
Andrew and Darlene Goebel Financial Aid for Mater Dei High School, Evansville
Ann & Tom Scheitlin for St. Benedict School, Evansville
Anne Elizabeth Rosenblatt Gehring Memorial for Nursing, Diocese of Evansville
Anne Keller Memorial for St. Benedict School, Evansville
April Anne Heathcott Religious Education for St. John the Baptist, Newburgh
Barbara Ruth Sullivan for Reitz Memorial High School, Evansville
Bart J. Crecco Memorial Scholarship for Evansville Catholic Interparochial High Schools
Bernie Lutz Chair of Roman Catholic Theology, USI, Evansville

Bishop’s Catholic High School Tuition Assistance
Bishop’s Catholic High School Tuition Assistance for Mater Dei High School, Evansville
Bishop’s Catholic High School Tuition Assistance for Reitz Memorial High School, Evansville
Bob King Endowment for Mater Dei High School, Evansville
Bob and Mary Lue Russler for Mater Dei High School, Evansville
Borries Family for Mater Dei High School, Evansville
Bradley & Mary-Beth Owen Family Education for Reitz Memorial High School, Evansville
Brenda H. Guerin for Good Shepherd School, Evansville
Brother Eugene Phillipp Memorial Foundation for Reitz Memorial High School, Evansville
Brother John Stout for Reitz Memorial High School, Evansville
Brott-Ritzel Memorial Scholarship for Reitz Memorial High School, Evansville
Butch and Linda Feulner Charitable Fund for St. Joseph, Vanderburgh County
Carl and Madeline Rexing for St. Joseph, Vanderburgh County

Catholic Diocese Schools
Catholic Schools Music Education
Charles L. Kuhn for St. Benedict, Evansville
Charles & Dolores Browning for St. Theresa, Evansville
Chris and Rose Sartore for Holy Redeemer, Evansville
Christ the King Education, Evansville
Christ the King Religious Formation, Evansville
Clarence & Evelyn Bramble-Lauber for Good Shepherd School, Evansville
Condi/Rathke for St. Theresa, Evansville
Dan and Kim Hermann Educational for Reitz Memorial High School, Evansville
Diocesan Adult Formation
Donald & Patricia Rupprecht for Mater Dei & Reitz Memorial High Schools, Evansville
Donald J. Sheridan for St. Joseph School, Princeton
Doris J. Daniel for St. Benedict School, Evansville
Dorothy Wilhelmus for St. Wendel School, St. Wendel
Dr. Cesar Bello Scholarship Fund for Reitz Memorial High School, Evansville
Dr. Charlotte R. Bennett for St. John the Baptist, Newburgh
Edward & Carolyn Scheessele for St. John the Baptist, Newburgh
Edward A. Arnold Education for Mater Dei High School, Evansville
Eugene and Janet Spahn for St. Wendel School, St. Wendel
F. Leo Peyronnin Student Need Fund for St. Mary Church, Evansville
Fifth Third Education for Mater Dei & Reitz Memorial High Schools, Evansville
Fr. Jerry Ziliak SVD Scholarship for the Study of Priesthood or Religious Life, Diocese of Evansville
Fred and Barbara Jean Bender for Holy Cross School, Fort Branch
Gene Logel for Reitz Memorial High School, Evansville

George & Bette Duncan Education for Mater Dei High School, Evansville
Gerald J. Birk for Reitz Memorial High School, Evansville
Gerry Adams for Reitz Memorial High School, Evansville
Good Shepherd School, Evansville
Grace Elizabeth Cox for Corpus Christi School
Harry L. Murray for St. Benedict, Evansville
Helen Johnson, Charles & Irene Murphy for Good Shepherd School, Evansville
Henry & Pauline Will Memorial for Good Shepherd School, Evansville
Holy Cross Religious Education, Fort Branch
Holy Cross School Transportation, Fort Branch
Holy Family School Foundation, Jasper
Holy Redeemer Catholic School Fine Arts, Evansville
Holy Redeemer Education, Evansville
Holy Rosary School, Evansville
I Am Catholic Scholarship for St. Mary Church, Huntingburg
Ira Gerard and Theresa Boots Educational for Mater Dei High School, Evansville
Ira Joseph and Dorothy Jane Boots Family for Mater Dei High School, Evansville
Irene Bacon Memorial for St. Theresa, Evansville
Jack and Kate Siemers Family for Mater Dei High School, Evansville
James A. and Sandra S. Weinzapfel in memory of Matthew J. and Olivia C. Weinzapfel for Mater Dei High School, Evansville
Jamie M. Blankenberger for St. Wendel, St. Wendel
Janice Frey Memorial for Good Shepherd School, Evansville
Jay Burger Memorial for Holy Cross School, Fort Branch
Jean Bennett Scholarship for Reitz Memorial High School, Evansville

Jeff and Debbie Marx for Mater Dei High School, Evansville
Jeff and Debbie Marx for Reitz Memorial High School, Evansville
Jerry Lamb for Good Shepherd School, Evansville
Jerry and Charlotte MacGregor Family for Mater Dei High School, Evansville
Joe and Kathy Weber for St. Joseph School, Evansville
Joe and Patricia Gossman for Mater Dei High School, Evansville
John & Marian Witting Scholarship for Mater Dei & Reitz Memorial High Schools, Evansville
Joseph Ream Charitable Fund, St. John the Baptist, Newburgh
Joseph T. and Mary Jane Theby for Mater Dei & Reitz Memorial High Schools, Evansville
Joseph T. Theby Scholarship for Mater Dei & Reitz Memorial High Schools, Evansville
Karen Georges Memorial for Holy Cross School, Fort Branch
Kyle Weis for Mater Dei High School, Evansville
Linda Denning Memorial for St. Matthew, Mt.Vernon
Loew Family for St. Matthew School, Mt. Vernon
Louie Wittmer Nursing and Medical Education for Mater Dei High School, Evansville

Louie Wittmer Nursing and Medical Education for Reitz Memorial High School, Evansville
Magdalen-Hildenbrand Education for St. Joseph, Evansville
Margaret B. Chappell Religious Education, Saints Peter and Paul, Petersburg
Margaret P. Ream Scholarship for St. John the Baptist, Newburgh
Marge Loehr Family for Good Shepherd School, Evansville
Marilyn S. and Raymond H. Kartusak for Sts. Peter & Paul, Haubstadt
Mary Jane Muensterman “Janie” Dale for Mater Dei High School, Evansville
Mary Patricia Corcoran for Christ the King School, Evansville
Mater Dei High School Friends & Alumni Association, Evansville
Mater Dei High School Operating, Evansville
Mater Dei High School Science and Technology, Evansville
Mater Dei High School Teachers’ Education for Mater Dei High School, Evansville
MEO Vision for Marian Educational Outreach Program, Evansville
Michael Pastor Scholarship for Holy Rosary School, Evansville
Michelle Diane Greenwell Memorial Scholarship for Mater Dei High School, Evansville

The Dr. Charlotte R. Bennett Endowment



During Catholic Schools Week, St. John the Baptist, Newburgh, took the opportunity to honor their principal of 26 years with the gift of an endowment in her name. Dr. Charlotte Bennett has witnessed over 800 students graduate during her 26 years and seeing that every student has an opportunity for a Catholic education has been a high priority to her.

Many parishioners, students, and parents made gifts to start this endowment and each year, it is providing students with financial assistance to attend St. John the Baptist Elementary School in Newburgh. Honoring our principals and teachers, as well as our students, is a wonderful way to celebrate Catholic education.

- Michelle Head Memorial for
St. Theresa, Evansville

Monsignor William Lautner for
Mater Dei High School, Evansville

Olivia Ritzert Wargel for Westside
Catholic School, Evansville

Patricia Koch Family Education for
for Mater Dei & Reitz Memorial
High Schools, Evansville

Patricia Reising Kern and Daniel T.
Reising for St. Benedict Cathedral
School, Evansville

Patrick H. Donahue, Sr. for Reitz
Memorial High School Music,
Evansville

Paul and Helen Mann Roy for
St. Philip School, Posey County

Paul Riley Trueblood Memorial,
Reitz Memorial High School

Reitz Memorial High School,
Evansville

Reitz Memorial High School
Friends & Alumni, Evansville

Reitz Memorial High School
Scholarship, Evansville

Reitz Memorial High School
Science and Technology,
Evansville

Reitz Memorial High School
Theatrical, Evansville

Reitz Memorial High School
Wrestling, Evansville

Rene’ Goulet Family for
St. Benedict School, Evansville

Resurrection School Memorial,
Evansville

Reverend Raymond Brenner for
Mater Dei High School,
Evansville

Rev. Raymond L. Kuper
Educational Excellence, for
Mater Dei and Reitz Memorial
High Schools, Evansville

Rev. William Deering Memorial
Scholarship in Music for Mater
Dei High School, Evansville

Rex Mundi Continuing Catholic
Education for Mater Dei and
Reitz Memorial High Schools

Rita L. Farney for Holy Rosary
School, Evansville

Robert and Judy Griffin
Educational for Reitz Memorial
High School, Evansville

Robert and Judy Griffin Art and
Music for St. John the Baptist,
Newburgh

Robert and Rosemary Rooney
Family for Mater Dei High
School, Evansville

Robert D. Hawes for
St. Theresa School, Evansville

Robert J. and Mary K.
Fehrenbacher Family Charitable
Fund for St. Joseph, Vanderburgh
County

Ron & Kathy Hollander Family
Education for Mater Dei High
School, Evansville

Rosemary & Thomas Hirsch
for Good Shepherd School,
Evansville

Rupert Pat Kohlmeyer Memorial
for St. Theresa School, Evansville

Ruth Anne Christiansen for
Reitz Memorial High School,
Evansville

Sacred Heart Catechist Formation
for Sacred Heart, Evansville

Saints Peter and Paul School,
Haubstadt

Sam Featherstone Memorial
Scholarship for Reitz Memorial
High School, Evansville

Sara Jane Stevenson Memorial for
Reitz Memorial High School,
Evansville

Shelly Knies Mehringer Art
Education for Christ the King
School, St. Benedict School, Reitz
Memorial High School, Evansville

Shirley and Justin Clements Music
for Mater Dei High School,
Evansville

Sister Karlene Sensmeier for
St. Benedict Cathedral School

SPRED Religious Education for
St. Joseph, Vanderburgh County

Sr. Beata Education for Marian
Educational Outreach, Evansville

Sr. Mary Terrance and Sr. Elaine
Knapp Memorial Scholarship for
St. Nicholas, Santa Claus

Sr. Victoria Pohl Education for
Mater Dei High School,
Evansville

St. Agnes Catechist Formation,
St. Agnes, Evansville

St. Benedict Parish Educational,
Evansville

St. Bernard School, St. Bernard,
Rockport

St. John the Baptist Adult Faith
Formation, Newburgh

St. John the Baptist Advanced
Education, Newburgh

St. John the Baptist Special
Education, Newburgh

St. John the Baptist Student
Scholarship, Newburgh

St. John the Baptist Technology,
Newburgh

St. Joseph School, Princeton

St. Joseph School, Vanderburgh
County

St. Mary Christian Formation,
St. Mary, Evansville

St. Mary Religious Education,
St. Mary, Huntingburg

St. Matthew Educational,
Mt. Vernon

St. Philip Catechist Formation,
St. Philip, Posey County

St. Theresa Parish High School,
Evansville

St. Wendel School, St. Wendel

Terry and Irma Friedman for
St. John the Baptist, Newburgh

The Tony Stricker for St. Joseph
School, Vanderburgh County

Thomas and Ann Scheitlin
Scholarship for Reitz Memorial
High School, Evansville

Thomas Tighe Tennis Scholarship
for Mater Dei High School,
Evansville

Tom and Joan Niemeier Family
for Mater Dei High School,
Evansville

Westside Catholic School,
Evansville

Wetzel Scholarship Fund for
St. Bernard, Rockport

Yeker Family Foundation for
St. John the Baptist, Newburgh
- Priest Retirement
Endowments

Diocese of Evansville
Priests’ Retirement

Hazel Harty Villa Maria, Evansville

Religious Vocations
Bishop Francis R. Shea Memorial
Charles R. and Betty J. Faver for
St. Meinrad and Sisters of
St. Benedict
Christ the King Priest
Father Tony Ernst Vocational
Scholarship, Princeton Deanery
Linus J. Hopf, Diocese of Evansville
Magister Noster Latin School
Alumni & Friends, Diocese of
Evansville
Resurrection Priest



**Father Tony Ernst
Vocational Scholarship
Endowment**
Princeton Deanery

Father Tony Ernst has been an influence in the lives of many people, especially young people who are discerning a life of vocation. Last year, during the Year of the Priests, parishioners heard the message from Father Tony about the need for priestly vocations.

To honor Father Tony this scholarship was established for a local young person entering the formation process for a religious vocation. The generosity of parishioners within the Deanery was overwhelming.

This year, four future seminarians from Holy Cross and Sts. Peter and Paul are each receiving a \$1,000 scholarship as they begin their path to a religious vocation. The endowment will assure that our Catholic faith is kept alive with the young people in these parishes.



Planned Giving Societies

Many of our parishes and schools have been blessed with gifts that parishioners have given them through their estate plans or by establishing permanent endowments. Many times, the parishes and schools did not have an opportunity to thank them for such a generous gift while the donors were living. These Planned Giving Societies allow schools and parishes a way to thank and recognize these generous donors now, who have made provisions for them in the future.

Currently, 18 parishes and schools have their own planned giving society which provides an opportunity for parishes to thank these people. Some parishes have an annual Mass, reception and a permanent way to recognize these donors. The following is the current list of planned giving societies across the Diocese of Evansville. If you have made provisions in your estate plans and your parish or school has a planned giving society, simply notify the office of your plans, and they would be honored to recognize you, as well.

- | | |
|--------------------------------|-----------------------------------|
| St. Benedict, Evansville | St. Benedict Legacy Society |
| Christ the King, Evansville | The King’s Circle |
| Good Shepherd, Evansville | Shepherd’s Society |
| Holy Family, Jasper | Holy Family Legacy Society |
| Holy Redeemer, Evansville | Steeple Society |
| Holy Rosary, Evansville | Holy Rosary Legacy Society |
| Holy Cross, Fort Branch | Stewards of
Holy Cross Society |
| Mater Dei High School | Ave Maria Society |
| Reitz Memorial High School | Holy Cross Society |
| St. Anthony, Evansville | The Paduan Society |
| St. Bernard, Rockport | Clair Vaux Society |
| St. Joseph, Jasper | The Kundek Society |
| St. John, Loogootee | The Emerald Society |
| St. John the Baptist, Newburgh | The Living Legacy Society |
| St. Joseph, Vanderburgh County | The Carpenter Society |
| St. Mary, Evansville | Building the
Kingdom Society |
| St. Theresa, Evansville | Little Flower Society |
| St. Philip, Mt. Vernon | St. Philip Legacy Society |



Global Social Justice Endowment

Encouraging Third World travel and the learning that comes from such trips is the primary goal of this endowment. Recipients of the annual award have traveled to Haiti, Belize, South Africa, Mexico and Ecuador, just to name a few. This endowment to support missionary work in these countries was started by Father James Lex in 2001 but since that time, countless other donors have added to this gift to help people in the Diocese of Evansville fulfill this goal.

Each year, donors are asked to remember this endowment. Father Earl Rohleder contributes proceeds from his book each year to help the endowment and the annual awards continue to grow.

Human Services

Betty Mayer for St. Vincent de Paul, Mt. Venron
Catholic Charitable Works
Catholic Charities
Christian Family Movement
Cursillo of Evansville
Diocese of Evansville Guadalupe Center
Estelle and Jerome Schneider Haiti, St. Joseph, Vanderburgh County
Gilbert J. Temple for St. John the Apostle, Evansville
Global Social Justice
Holy Family Center for Life, Diocese of Evansville
Horak-Dossett Senior Outreach Ministry for Holy Redeemer, Evansville
Keith and Susanne Emge Food Pantry for St. Mary, Evansville
Knights of Columbus Council #565 Charitable Foundation
Little Sisters of the Poor, Evansville
M & L Jochum Haiti Student, St. Joseph, Vanderburgh County
Margaret G. & Thomas J. Wolf, Evansville
Matilda C. Anders for St. Anthony, Evansville
Ministry to Haiti
Mother Teresa for St. Joseph, Vanderburgh County

Richard E. and Emilie C. Seib Dental Outreach for St. Mary, Evansville
Robert A. Deig for St. Vincent de Paul Society, St. Benedict, Evansville
Robert J. Tempel, Evansville
Sr. Mary Mundy, SP, Justice Series for St. Mary, Evansville
St. Anthony Center for Family Life, St. Anthony, Evansville
St. John Conference of St. Vincent de Paul, St. John, Loogootee
St. John the Baptist Social Outreach, Newburgh
St. Mary Feed the Family, Evansville
St. Mary Outreach Ministry, Evansville
St. Mary Perpetual Help, Sullivan
St. Vincent de Paul Food Pantry, Loogootee
St. Vincent de Paul Society, Evansville
St. Vincent de Paul Society, St. Anthony
Tweedall-Tempel for St. Joseph, Evansville
Wisdom Program for the Catholic Diocese of Evansville
2 Anonymous Endowments

Youth Endowments

Bert Miller Memorial Scholarship for Eagle Scouts, Troop 399
Beverly “Bev” Kaelin Family for St. Benedict, Evansville
Bishop Gerald A. Gettelfinger Catholic Scouting
Catholic Diocese Youth
Dennis J. Burrows Operation Enduring Freedom for St. Benedict Cathedral, Evansville
Jack and Emily Thompson Scouting for St. John the Baptist, Newburgh
Louise Becker Youth
St. John the Apostle Childcare Program, Evansville
St. John the Baptist Athletic, Newburgh
St. John the Baptist PTSA for St. John, Newburgh
St. John the Baptist Youth, Newburgh
Theresa Baehl Youth Ministry for St. Joseph, Vanderburgh County
Tom Sermersheim Youth Ministry for St. Nicholas, Santa Claus
Anonymous Endowment

Other Endowments

Catholic Center Operating
Catholic Foundation of SW Indiana
Holy Cross Holy Name Athletic, Fort Branch
Rev. Joseph L. Ziliak Communications for Diocese of Evansville
Susanne and Keith Emge Catholic Foundation

Charitable Gift Annuities (21)

Donor Advised Funds (10)

Liaisons Across the Diocese

With the help of these volunteers, parishes are able to have liaisons at their own parishes who are instrumental in communicating the importance of endowments and how the annual distributions have made a difference to fellow parishioners. Thank you to these people who are scheduling estate planning sessions for parishioners, writing the parish stories, and sharing best practices across the Diocese.

St. Clements	Boonville	Bernard Peters
St. Celestine	Celestine	Tony Buechler
St. Joseph	Dale	Lisa Helming
St. Raphael	Dubois	Terry Friedman
Christ the King	Evansville	Tom Falkenstein
Corpus Christi	Evansville	Don Fuchs
Holy Rosary	Evansville	Ted Ziemer Chad Sander
St. Benedict's	Evansville	Jim Flynn
Good Shepherd	Evansville	Mike Schapker
St. Theresa	Evansville	Beth Knapp
Resurrection	Evansville	Marcia Jochem
St. Anthony	Evansville	Lisa Foster
St. Boniface	Evansville	Sara Kemmerlin Deacon Dave Franklin
Holy Cross	Ft. Branch	Steve Hall
St. Peter and Paul	Haubstadt	Dean Happe
St. Mary	Huntingburg	Dave Schipp
Precious Blood	Jasper	Kent Reyling
Holy Family	Jasper	Barb Balka
St. Matthew's	Mt. Vernon	Tom Sommerfield
St. Philip	Posey County	Roselle Weinzapfel
St. Bernard	Rockport	Beverly and Bill Symon
St. Nicholas	Santa Claus	Pat Koch
St. Anthony	St. Anthony	Martha Bohnert
St. Wendel	St. Wendel	Linda Schmitt
Sacred Heart	Schnellville	Charlie Vonderheide
St. Joseph	Vanderburgh County	Jim Werner
St. John's	Vincennes	David Carpenter
St. Francis Xavier	Vincennes	Tim Lowe
Sacred Heart	Vincennes	Scott Campbell
Our Lady of Hope	Washington	Duane and Diane LaGrange



CREATING CATHOLIC LEGACIES

4200 N. Kentucky Ave.
PO Box 4169
Evansville, IN 47724

www.CreatingCatholicLegacies.org • 812-424-5536

Starting an Endowment

Creating your own Catholic Legacy is easier than you may imagine. Many people wish to make a gift to their parish or school that would be lasting and the Catholic Foundation helps people to Create a Legacy by establishing endowments. An endowment is a wonderful way to make a gift for the general needs of a parish, school, ministry, or to direct it for a specific purpose. Looking through the pages of the Annual Report, you will see some of the ways that people have chosen to create their legacy.

A minimum gift of \$5,000 is needed to start an endowment and you may name the endowment however you decide. The donor determines who will be the beneficiary and who will make the decisions on the annual distributions from the endowment. It then becomes the Catholic Foundation's responsibility to oversee the investments, protect the gift forever and see that the annual distributions are being used to the donor's original intent. Last year, 4.25% of each endowment was available for distribution to endowment holders and this distribution will be available every year. Let us help you memorialize or honor someone and Create your Catholic Legacy.



Catholic Foundation Mission Statement

The Catholic Foundation of Southwestern Indiana promotes perpetual funding of Catholic organizations within the Diocese by establishing endowments, managing foundation assets, and providing information on planned giving.