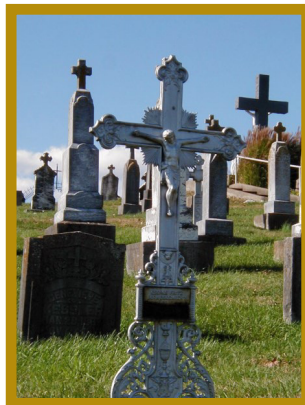


# HELPING INDIVIDUALS CREATE LEGACIES TO SERVE GOD THROUGH CATHOLIC CAUSES



  
**the CATHOLIC  
FOUNDATION**  
*of Southwestern Indiana*

Please accept my personal welcome, and invitation to find out a bit more about The Catholic Foundation of Southwestern Indiana. Our mission is to serve individuals in the Diocese of Evansville to serve God through Catholic causes, and empower Catholics to be the hands and feet of Christ. We strive to collaborate with Catholics within our region to build upon the rich culture and history of our faith, and to be actionable moving forward into a bright future of support for our church.



Since 1992, the Catholic Foundation of Southwestern Indiana has served parishes, schools, and every Catholic ministry throughout the Diocese of Evansville. Our board of directors represent the four deaneries within the diocese, and take great care in leading our efforts and providing leadership and oversight to nearly 700 separate endowments and permanent gifts to support our church. They have worked with great diligence to ensure fiduciary responsibility for our efforts, and to make certain that our investments are socially responsible within the guidelines of our Catholic faith.

The Catholic Foundation of Southwestern Indiana is one of the leading Catholic foundations in the United States assisting parishioners establishing their philanthropic legacies through endowments, charitable gift annuities, and many other planned giving vehicles. We are very thankful to those who have entrusted us to play a role in their commitment to their faith, and we strive to provide the service of stewardship to their commitment as they serve various needs throughout the diocese.

As you browse the materials provided for you, I ask that you prayerfully consider your place in our Catholic community in Southwestern Indiana. If within your discernment you find that we may be of assistance to you, your parish, Catholic school, or other Catholic ministry within the Diocese of Evansville, please know that we are here for you and eager to help.

In Service,

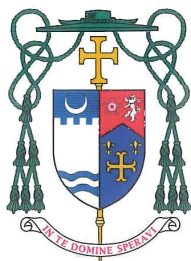
A handwritten signature in black ink that reads "Todd Brock". The signature is written in a cursive, flowing style.

Todd Brock

Executive Director

The Catholic Foundation

of Southwestern Indiana Inc.



## Catholic Diocese of Evansville

Office of the Bishop

4200 N. Kentucky Ave. · P.O. Box 4169 · Evansville, IN 47724-0169 · Tel. 812-424-5536 · Fax 812-436-7450 · [www.evdio.org](http://www.evdio.org)

Brothers and Sisters in Christ,

The worship of God, faith formation and service to others are central in the life of our Church and the Catholic Foundation of Southwestern Indiana works to ensure these constitutive elements of our faith will be as vibrant and effective for future generations of Catholics as they are today. It is how we invest our resources here and now that will impact the opportunities and abilities for ministry within the Diocese of Evansville in the years to come. As a member of the Board of Directors, I have seen how The Catholic Foundation enables the growth and development of the Church in our 12 counties. I am grateful for the wisdom and foresight of those who established the Foundation almost 27 years ago.

Pope Francis often reminds us that it is not enough to say that we are a Christian; we must live the faith not only through our words but also with actions. The Catholic Foundation is a ministry that exemplifies both as it helps Catholics in our diocese to become the voice, hands and feet of Christ by providing funding for parish support, Catholic education, social justice ministries, and vocations.

It is my hope that as you become more aware of the services of The Catholic Foundation, you will prayerfully consider being part of its important mission. It is one way of responding to the Lord's call to be a good steward of the blessings He has bestowed on you.

With assurance of my prayers, I remain,

Sincerely Yours in Christ,

Most Reverend Joseph M. Siegel, DD, STL  
Bishop of Evansville





## WHO WE ARE

The Catholic Foundation of Southwestern Indiana Inc. is a not for profit charitable organization that receives and manages assets to provide perpetual funding for: parish support, Catholic education, social justice initiatives, and vocations, within the Diocese of Evansville.

The Catholic Foundation of Southwestern Indiana Inc. offers Catholics the opportunity to leave their legacy uniquely aligned with their Catholic values and beliefs.

## WHERE WE COME FROM

For more than 25 years the Foundation has helped create more than 600 permanent endowments. Each one a testament to a family or individual who chose to express their faith and commitment by establishing a permanent gift that will continue to make a difference to their Catholic community far into the future. The combined value of these endowments exceeds 50 million dollars.

Those original Board members laid a strong foundation and planted seeds all across the Diocese that led to the current successes.

## WHY WE SERVE

### OUR MISSION

Helping individuals create legacies to serve God through Catholic causes.

### OUR VISION

Empowering Catholics to be the hands and feet of Christ.

### OUR CORE VALUES

Focused within our faith in God...

To create opportunity...

To support our Catholic community...

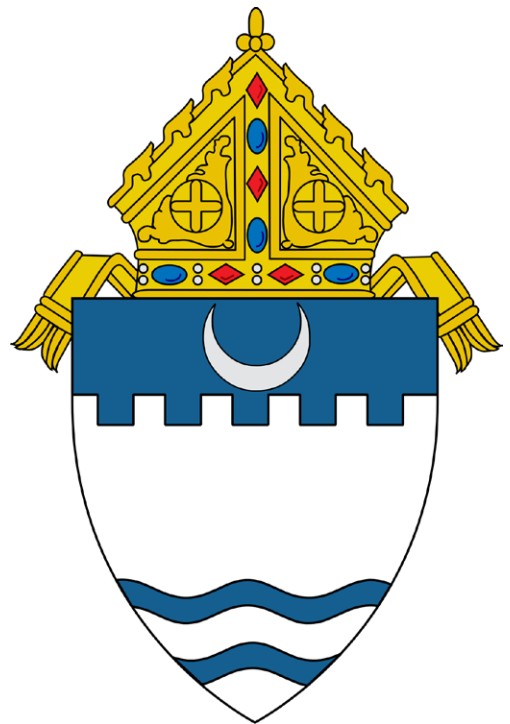
To create legacies from individuals for God's work...

To enable, facilitate, and serve...

To create and preserve...

To strive for stability and perpetuity...

And to inspire.





## ENDOWMENTS

An endowment is a gift of cash or other donated property (stocks, bonds, real estate, etc.) invested to produce ongoing income for a specific or general use. The donor who establishes an Endowment is, in essence, creating their own Catholic legacy. They have the opportunity to name a specific beneficiary within the Diocese. For example, many individuals and organizations establish endowments to ensure that Catholic cemeteries, schools, parishes and ministries will continue to receive annual support. Donors may establish and name the endowment for a minimum gift of \$5,000. *Anyone can add to an existing endowment at any time and in any amount*

## DONOR ADVISED FUNDS

Giving becomes convenient and personal with a Donor Advised Fund, which offers a hands-on approach to philanthropy. This fund invests your charitable gift to grow tax-free for future giving. A Donor Advised Fund allows you the opportunity to make contributions to multiple Catholic organizations from one account. The Catholic Foundation Donor Advised Funds can be set up with as little as \$10,000.

### KEY BENEFITS:

- Immediate tax deduction with the option of deferred charitable distribution
- Consolidates your charitable giving, providing administrative convenience
- Flexibility to choose multiple grant recipients
- Ability to add to the fund at any time
- Make donations anonymously, if desired
- Wish to create a family legacy of faith – name your children, grandchildren or other loved ones as successor advisors to the fund

## CHARITABLE GIFT ANNUITIES

A Charitable Gift Annuity is a contract with The Catholic Foundation that provides you with fixed income payments for life, no matter how long you live. Payment rates are based on age and are set by the American Council of Gift Annuities. At the end of your life, the remainder of the annuity becomes an endowment fund to benefit the specific Catholic organization you designate. The minimum amount to establish a Charitable Gift Annuity is \$10,000.

### KEY BENEFITS:

- Fixed income for life for you, or for you and a spouse (paid quarterly or annually)
- Avoid capital gains taxes on highly appreciated assets
- Income tax deduction in the year the annuity is established
- Part of each income payment is tax-free

## COMMON GIVING OPTIONS

Types of Gift	Benefits to Donor	Choose this Gift if Objective is:
<b>CURRENT GIFTS</b>		
Cash	Simplicity Donor may designate gift or leave as unrestricted Full tax deduction	Maximum deduction subject to current tax laws No need for income
Endowments	Full tax deduction Donor can leave a permanent legacy Opportunity to memorialize or honor individual or family Donor can specify area to be funded	Maximum deduction subject to current tax laws No need for income
Donor Advised Funds	Full tax deduction Donor directs additional gifts throughout the Diocese Donor can designate one successor Opportunity to memorialize or honor individual or family	Maximum deduction subject to current tax laws Control over direction and timing of gifts No need for income
Securities/Real Estate	Tax deduction for fair market value Avoids capital gains tax	Maximum deduction subject to current tax laws No need for income
<b>DEFERRED, REVOCABLE GIFTS</b>		
Bequest in Will	Control over estate distribution Avoids estate tax	Retain control throughout life Estate tax deduction
Retirement Accounts	Estate tax deduction if charity is beneficiary	Retain control throughout life Estate tax deduction
Life Insurance	Tax deduction for premiums paid on existing policy, if charity is owner Tax deduction for current value of policy Avoids estate tax	Ability to make large gift for low cost Tax deduction
<b>DEFERRED, IRREVOCABLE GIFTS</b>		
Charitable Gift Annuity	Stream of guaranteed income for one or two lives, Charitable income tax deduction in the year the gift is made Some tax-free annual income	Consistent annual income Some tax deduction

*These giving options are currently available through the Catholic Foundation of Southwestern Indiana, Inc. They are listed in this brochure to provide gift, estate, and financial planning information. It is not intended as legal, accounting or other professional advice.*

## FOUR PILLARS

The Catholic Foundation works in collaboration with donors, to support four distinct Diocesan ministry areas which we characterize as our four pillars.

### PARISH LIFE • CATHOLIC EDUCATION SOCIAL JUSTICE • VOCATIONS

Each of these areas represent our Catholic faith in action.



 **the CATHOLIC FOUNDATION**  
*of Southwestern Indiana*



**AS THE FOUNDATION THAT REPRESENTS ALL CATHOLICS WITHIN THE DIOCESE OF EVANSVILLE, THE CATHOLIC FOUNDATION WILL SEEK TO PERPETUATE AND BUILD UPON THE RELATIONSHIPS WITHIN OUR PARISHES TO BETTER SERVE OUR COLLECTIVE MISSION AS A FAITH FOCUSED FAMILY OF BELIEVERS AT ALL PARISHES WITHIN THE DIOCESE.**

Marlena Sloss © The Dubois County Herald, reprinted with permission





## DAVE AND RITA BLESSINGER HOLY FAMILY BEREAVEMENT ENDOWMENT

Endowments that support parish life grow out of necessity, philanthropy, the desire to leave a legacy and most importantly passion. It may be the music at mass, the beautiful stained glass, the bible study or the lovely parish cemetery that you feel connected to and passionate enough about to make sure it continues into the future. Endowments are the vehicle that can help make that dream a reality. They can help provide the funding that allows your parish to keep these ministries alive, and to help maintain the buildings and grounds of the parish.

Your local parish, through the years, becomes your extended family. Your children are Baptized, make their First Communion, and Confirmation in the same space where you worship together every Sunday. They attend the parish school and the parents of their friends become your friends. Eventually, they may even marry their love in the parish you have called home for all of their lives and most of yours.

Dave and Rita Blessinger have this kind of connection with Holy Family Parish in Jasper, Indiana. They are part of a dedicated group of parish volunteers who minister to families when they are grieving and saying good-bye to their loved ones. This group ensures that when families come together after a funeral there is a lovely bereavement meal for them to enjoy while they share stories and celebrate the family members who are no longer with them.

The Blessingers established the *Dave and Rita Blessinger Holy Family Bereavement Endowment* to make sure that, when they are no longer around, funds will be available to help with some of the costs of bereavement meals at the parish. This particular ministry is close to their hearts and they feel it is a real value to parishioners who are their church family.



**AS A CATHOLIC COMMUNITY, WE WILL SEEK TO BE WHOLLY SUPPORTIVE OF OUR CATHOLIC EDUCATIONAL EFFORTS, SUPPORTING INITIATIVES THAT MAKE CATHOLIC EDUCATION A HALLMARK OF THE DIOCESE: WITH A CULTURE OF TEACHING AND LEARNING DIRECTED TOWARD SPIRITUAL, PERSONAL, AND PROFESSIONAL SUCCESS.**



## WILL FAMILY ENDOWMENT

Catholic education is a vibrant example of the Church in the Diocese. Every day Catholics renew their commitment to the future of their faith by investing in education of our youth, young adults, religious leaders, and Catholics from the cradle to the grave.

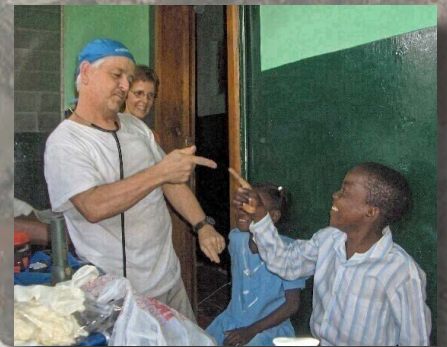
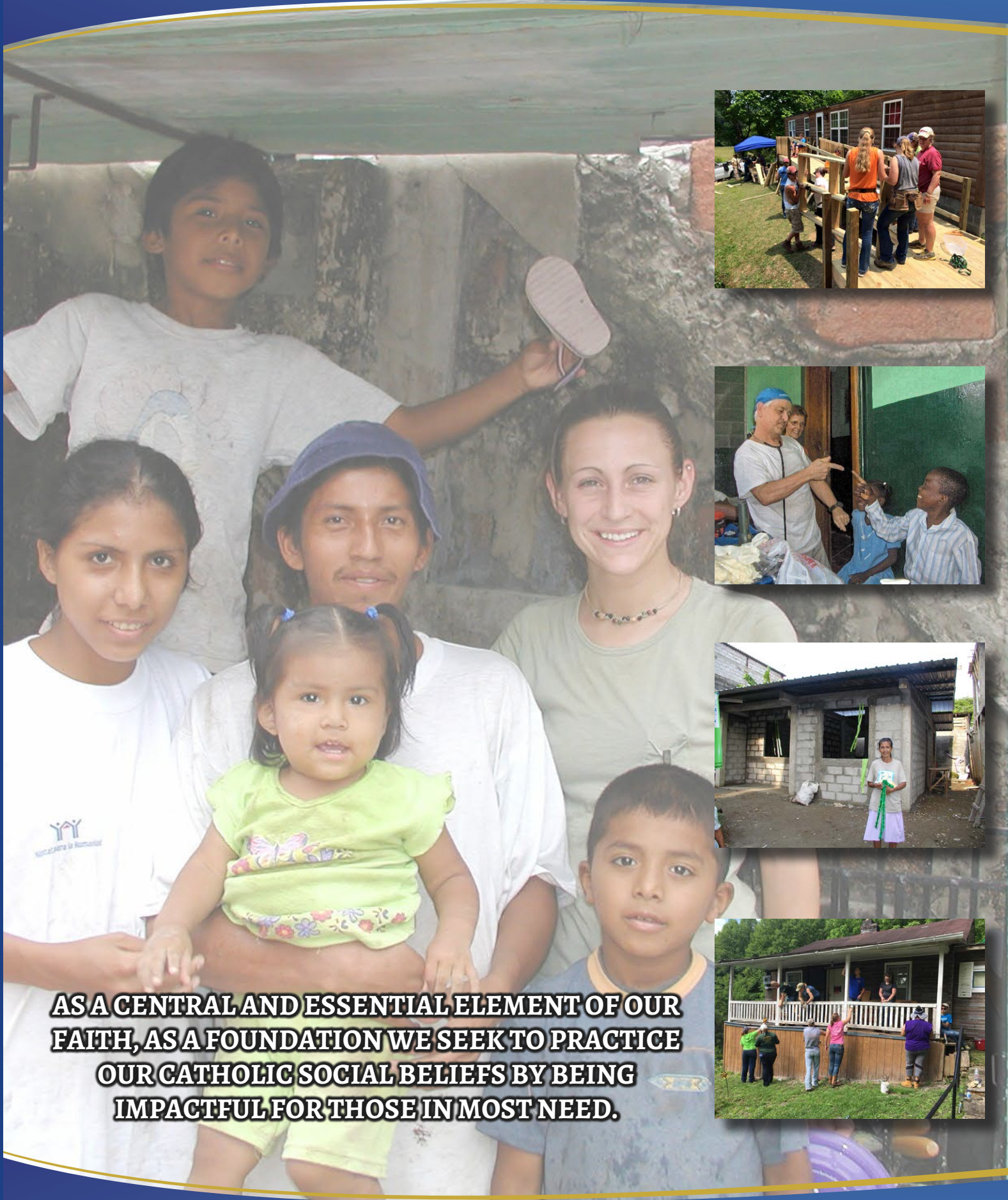
One man's dedication to supporting young people and showing by example what it is to live your Catholic faith was the impetus behind his children, Linda Hague and Len Will, Jr., creating the Dolores and Len Will, Sr. Endowment.

Sports was a lifelong passion for Len Will. He participated in baseball, track, basketball and football while attending Reitz Memorial High School and would go on to coach each of those sports at Mater Dei High School.

In 1949 Msgr. William Lautner, superintendent of Mater Dei at the time, asked Len to teach and coach at the new high school. Len would continue in this capacity for the next 24 years. He served as head football coach and was inducted into the Indiana Football Hall of Fame. Len was also head coach for both baseball and track and reserve basketball coach. According to his daughter, Linda Hague, "Teaching and coaching became a full time focus for his life. He taught his students by the way he lived. He was a gentleman, treating everyone, players included, with respect. He addressed them as men and never raised his voice, he listened and was calm and attentive."

Len married his high school sweetheart Dolores DeToro, in 1943. Dolores supported her husband keeping things going at home while he put in long hours teaching and coaching. She liked to go to the games, even after she was struck by polio and had to attend in a wheelchair. Linda, spoke about her parent's marriage, "Their Catholic Faith was an extremely important part of their life. They were a team and they had love."

The Dolores and Len Will, Sr. Endowment is for tuition assistance for students to attend Mater Dei High School. It was created by, Linda (Will) and Ralph Hague and their children Ralph Jr., Christine (Kellams), Rory, Courtney (DeWees), and Caryn (Hudspeth): Len, Jr. and Elena Will and their children Marie (Pickerill), Len III, Eric, Ryan and Amy (Carson).



**AS A CENTRAL AND ESSENTIAL ELEMENT OF OUR FAITH, AS A FOUNDATION WE SEEK TO PRACTICE OUR CATHOLIC SOCIAL BELIEFS BY BEING IMPACTFUL FOR THOSE IN MOST NEED.**



## OZANAM FAMILY SHELTER ENDOWMENT AND HOUSE OF BREAD AND PEACE ENDOWMENT

Extending a helping hand to those in need can take many different forms. On any given night in the Evansville area more than 450 people are homeless, roughly one third of these are children. Some are on the street but many find comfort, shelter, food, clothing, and much more at two local homes for those with nowhere else to go. They have found refuge at the House of Bread and Peace or the Ozanam Family Shelter. The work done by these two homeless shelters represents the hands and feet of Christ at work in the Evansville community.

In 1989, the Ozanam Family Shelter Corporation was founded by the St. Vincent de Paul Society Evansville District. The shelter houses up to seventeen families and eight single women who are in need of temporary emergency housing. Ozanam employs eight staff members who provide around-the-clock supervision and care. Their programs are designed to provide residents with the necessary tools to aid in their struggle to identify and overcome the barriers that contribute to homelessness. They also strive to assist residents in building and maintaining stronger support systems for themselves and their families as they regain their independence.



The House of Bread and Peace is a shelter for women and women with children. Since opening in 1986, it has provided a homelike environment in which hundreds of homeless women and children have been able to heal from the wounds of homelessness. The mission of The House of Bread and Peace is to provide for the basic needs of homeless women and children while assisting the women in becoming independent and self-sufficient. They help them build a strong foundation for a more successful life by identifying and addressing their individual needs and goals. Founded by Sister Joanna Trainer the House was patterned after the Catholic Worker houses started by Dorothy Day.



For one local couple, helping people help themselves was the driving force behind establishing two endowments, one for *The House of Bread and Peace* and one for the *Ozanam Family Shelter*. By creating these endowments they will continue to make a difference in people's lives now and far into the future. Each of these shelters has specific programs to address issues related to homelessness and poverty, which include setting goals, money management, life skills, and referrals to other community agencies. These two charities help this couple fulfill their goal of helping people help themselves.

Once an endowment is started additional contributions can be made to it in any amount and at any time.



**FINANCIALLY SUPPORTING THE EDUCATION  
AND EFFICACY OF OUR SEMINARIANS,  
AND CREATING A BROADER AWARENESS  
OF THE RELIGIOUS LIFE WITHIN OUR DIOCESE.**





## DIocese of Evansville Seminarian Endowment

Supporting vocations throughout the Diocese includes many different experiences. The Diocese of Evansville Seminarian Endowment helps to provide the resources needed to train men for the priesthood. This is a glimpse at the life, the journey, that brought Father Tyler R. Tenbarger to his current role as parochial vicar for St. Boniface Parish and the Director of the Father Deydier House of Discernment.

Fr. Tyler Tenbarger - When I was child, I was open to God's call in my life, a calling to become a priest. I heard it when I was in second grade. In fact, I talked about becoming a priest even before I am able to remember that myself. But my parents and teachers tell me I said it, and there's photo evidence that I dressed up as a priest when I was just a boy. I heard the Lord calling me. It wasn't too far out there. It wasn't "too remote" or too high. It was just there, in me, and I knew it. But then other things started getting in the way. As I grew, my desires changed. And so did my understanding of my vocation. I began thinking about other things I wanted to be, other things I wanted to do with my life. You better believe people still asked me if I was thinking about priesthood, and you can be sure that I would tell them No. Of course I was still thinking about it, but that's the last thing I wanted to actually do!

Give up a wife, children, grandchildren, where I will live, who I will live with? Give up how I will spend each day, what I will wear, what times of the night I might get a call, how I will spend my holidays, and committing to a life of giving myself away?

And so I embarked on my own adventures. I dated in high school and after high school. I applied to Purdue University, got accepted into a fraternity. Pretty normal stuff. At the same time, I also ran for election to what's called a "state officer" in the FFA – Future Farmers of America – here in Indiana. Less than a month after graduating high school from Gibson Southern, I put my college plans on hold and set off on a year serving as the (student) President of the Indiana FFA. It was one of the most enjoyable and rewarding years of my life. During that year, I still heard the words of the Lord coming back, echoing again in my heart. Soon, they were in my mouth, on my lips, as Moses says, when I began to talk with a priest about whether God might be calling me to become a priest. But it wasn't clear to me. It seemed so far away, so "high" in the sky or across the sea. And so I went high in the sky and across the sea.

After serving as a state officer for Indiana FFA, I ran for a similar position with the National FFA Organization. Six young adults, from all across the country, are elected to the roles each year, and I was elected as a Vice President. I spent most weeks flying to different cities in nearly 40 states, speaking to high school students about leadership development, building partnerships with agricultural business and industry leaders, and talking policy with state and federal elected officials. I traveled to Japan to meet with the global vice president for community affairs of Toyota and to network with young professionals of a large Japanese company called Mitsui. It was pretty awesome. I even met President George W. Bush in the White House on two occasions and did a PR tour with country singer Jewel for the Campbell Soup Company. Give up my life?! I was finding it! Or so I thought.

But as much excitement as traveling and speaking and networking and growing in skill was, and as proud as so many people in my life were of me, I would get on another plane or meet another official or speak to another crowd, and I would find myself hearing a voice calling me, asking me to “carry...out” my real mission, my real vocation. That’s my story. The story of how a 28-year-old guy from Haubstadt, the son of a dairy and grain farmer of a family of 9 ended up as a priest.

In the Catholic Church, as well as in life, choosing one’s vocation usually involves a period of contemplation, research, study, and discernment. Traditionally Catholics thought of vocations as a call to the priesthood or to religious life and consecrating oneself to God. In modern times, especially following Vatican II, a committed single life, marriage, parenthood, and other service, when combined with a commitment to Christian faith and practice, have come to be recognized as vocations as well.

Endowments exist that help support marriage preparation, parenting, and family life. The vocation from which all other vocations come. A loving, catholic home is the fertile ground where the seeds of faith can take root and grow. Seminarian education, priest continuing education, and retirement are supplemented by several endowments set up by parishes, individuals, priests, and the recent capital campaign. Missionary work, Catholic theology, and discernment programs also receive money from endowments to continue the work of helping individuals recognize and fulfill their own vocation.





**OFTEN TIMES WHEN SOMEONE PASSES AWAY THOSE THEY LEAVE BEHIND HAVE MANY QUESTIONS ABOUT A VARIETY OF THINGS. THE NEXT TWO PAGES ARE INCLUDED AS A PLACE TO SUMMARIZE THAT INFORMATION.**

Personal Information

\_\_\_\_\_  
(Full Legal Name)

Address \_\_\_\_\_

Telephone \_\_\_\_\_

Emergency Contact

Name \_\_\_\_\_

Address \_\_\_\_\_

Telephone \_\_\_\_\_

Email \_\_\_\_\_

Name \_\_\_\_\_

Address \_\_\_\_\_

Telephone \_\_\_\_\_

Email \_\_\_\_\_

Date of birth \_\_\_\_\_

SSN \_\_\_\_\_

Place of birth \_\_\_\_\_

Birth certificate \_\_\_\_\_

Location \_\_\_\_\_

Citizenship \_\_\_\_\_  
(Name of Country)

Family History

Spouse's name \_\_\_\_\_

Address \_\_\_\_\_

Father's name \_\_\_\_\_

Mother's name \_\_\_\_\_

Maiden name \_\_\_\_\_

Former spouse \_\_\_\_\_

Children's names, ages, addresses

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Grandchildren's names, ages, addresses

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Other relatives and friends

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

### Where to find things

Below is a list of items and their location that may be important when settling my estate.

#### Bank Accounts

Account # \_\_\_\_\_

Bank \_\_\_\_\_

Account # \_\_\_\_\_

Bank \_\_\_\_\_

Account # \_\_\_\_\_

Bank \_\_\_\_\_

Insurance \_\_\_\_\_

Policy # \_\_\_\_\_

Company \_\_\_\_\_

Policy # \_\_\_\_\_

Company \_\_\_\_\_

#### Retirement accounts or other investment accounts

Asset \_\_\_\_\_

Fin Institution \_\_\_\_\_

Asset \_\_\_\_\_

Fin Institution \_\_\_\_\_

Asset \_\_\_\_\_

Fin Institution \_\_\_\_\_

Creditors \_\_\_\_\_

Account # \_\_\_\_\_

Institution \_\_\_\_\_

Account # \_\_\_\_\_

Institution \_\_\_\_\_

Income \_\_\_\_\_

Annual amount \_\_\_\_\_

Source \_\_\_\_\_

Annual amount \_\_\_\_\_

Source \_\_\_\_\_

Annual amount \_\_\_\_\_

Source \_\_\_\_\_

My safety deposit box or lock box can be found \_\_\_\_\_

### Funeral Arrangements

Arrangements to be made by \_\_\_\_\_

Address \_\_\_\_\_

Telephone \_\_\_\_\_

Cemetery \_\_\_\_\_

Address \_\_\_\_\_

Funeral home \_\_\_\_\_

Service type \_\_\_\_\_

Music \_\_\_\_\_

Scriptures \_\_\_\_\_

Other readings \_\_\_\_\_

### Memorial Gifts

Organization \_\_\_\_\_

Address \_\_\_\_\_

Organization \_\_\_\_\_

Address \_\_\_\_\_

I direct that my body be used for these medical purposes

\_\_\_\_\_



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