



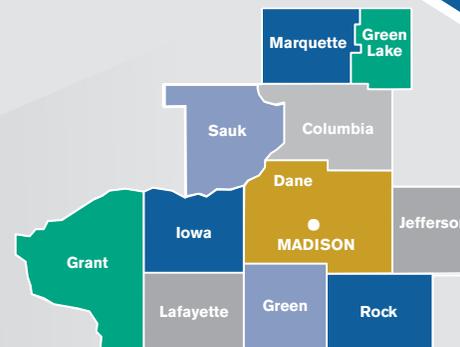
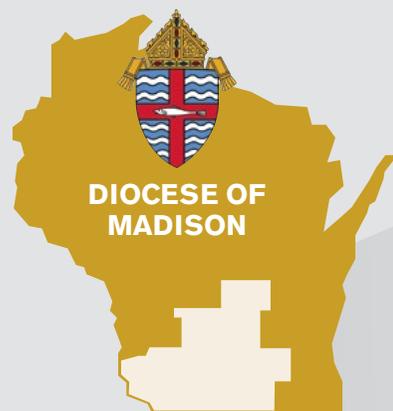
Catholic Diocese of Madison Foundation

Growing Together. Building Our Faith.



2016-2017 Annual Report

Foundation



We will
serve as a long-term
funding source in direct
support of our Diocese
and its bishop.

A Message **A MESSAGE FROM BISHOP MORLINO**

January 2018

Dear Brothers and Sisters in Christ,

I am pleased to share with you The Catholic Diocese of Madison Foundation's Annual Report for fiscal year 2016-2017. The Foundation built great momentum in the last year adding 5 new funds and growing assets under management by more than \$10 million. The growth of The Catholic Diocese of Madison Foundation (CDMF/Foundation) is a testament to the stability, faith, and vibrancy of our Catholic community in the Diocese of Madison.

Gifts made through the Foundation strengthen a variety of ministries in our Catholic community. Your generosity provides scholarships to Catholic schools, grants to support individuals with disabilities, faith formation and Catholic enrichment programs, education for seminarians, and more.

As you review the pages that follow, prayerfully consider how God may be calling you to designate your material gifts to fulfill your Catholic stewardship goals. The Foundation provides a unique opportunity to support parishes, schools, and ministries with a variety of gifting opportunities that will support the Church for generations to come.

The Foundation closed the year with over \$38 million in investment assets. What a remarkable commitment to the future on behalf of our community today! It is a joy to build up Christ's Church with each of you.

May God continue to bless us!

Gratefully yours in Christ,

+ Robert C. Morlino

Most Rev. Robert C. Morlino
Bishop of Madison



Saint Mother Teresa **SAINT MOTHER TERESA MERCY ENDOWMENT**

The Saint Mother Teresa Mercy Endowment provides assistance to ministries and programs to address the Corporal and Spiritual Works of Mercy in the Diocese of Madison.



Priests for Our Future **PRIESTS FOR OUR FUTURE ENDOWMENT**

The Priests for Our Future Endowment, established in 2014, provides support for the education of seminarians in the Diocese of Madison.

“I am studying in Rome for my last four years of seminary formation. Here in the Eternal City I am experiencing the richness of our Catholic Tradition, thanks to the donors of the Diocese. There are countless blessings that come with studying in Rome, yet my heart is restless. This is because I am away from those whom I will be shepherding as a priest, the People of God in the Diocese of Madison. My mind and heart are fixated on returning to become a priest of Jesus Christ and serving his people.”

— SEMINARIAN LUKE POWERS



Building a Legacy **BUILDING A LEGACY AT ST. PATRICK**

With family ties to St. Patrick Congregation of Janesville dating back to 1865, and a desire to see the parish and school community thrive, a Janesville family established the St. Patrick Congregation of Janesville Tuition Assistance Endowment Fund. The fund provides scholarships for families in need of financial assistance to send their children to St. Patrick School.

“Our hope in establishing the fund was that families wishing to provide a Catholic education for their kids not be discouraged by tuition costs. Our family knows the blessings that come from Catholic education, and we want that to be an opportunity available to all families in the community. The CDMF provided a simple process to establish an endowment that fulfilled our goals. They do all the work to ensure funds are invested wisely and distributed appropriately. We are delighted each year to hear the fund is helping so many families.”

— FOUNDRING DONORS OF THE ST. PATRICK CONGREGATION OF JANESVILLE TUITION ASSISTANCE ENDOWMENT FUND

More than 29 families have benefited from the tuition assistance program since it was established in 2014.

Making a Gift **MAKING A GIFT THROUGH THE FOUNDATION**

The CDMF offers many ways to support a Catholic parish, school, or ministry that blessed you in your lifetime. Choose the gift option that is right for you!

- Remember an existing endowment or create a new endowment fund through your will
- Create a new endowment fund today that helps build a stronger tomorrow
- Transfer appreciated securities to support or establish an endowment
- Set up a recurring gift to an endowment on the CDMF website
- Direct memorial gifts at your or a loved one's funeral to an endowment fund with the CDMF
- Designate an endowment as the beneficiary of your life insurance policy or retirement plan
- Make a gift that provides you income for life

We will
make giving easier.



PARISH ENDOWMENTS

Provide funding to parish programs and services

- Cathedral Parish of St. Raphael Endowment, Madison
- St. Ann's Congregation Parish Endowment, Stoughton
- St. Michael the Archangel Parish Endowment, Mount Horeb
- St. Mary Congregation of Pine Bluff Endowment, Pine Bluff
- St. Olaf Parish Endowment, Deforest
- Queen of All Saints Congregation Endowment, Fennimore

VOCATION ENDOWMENTS

Provide funding for the education of seminarians of the Diocese of Madison

- Priests For Our Future Endowment
- Queen of Apostles Vocation Endowment

CATHOLIC COMMUNITY ENDOWMENTS

Provide funding to ministries and apostolates

- Apostolate for Persons with Disabilities – Diocese of Madison Endowment
 - John J. Karsten Memorial Endowment
 - Saint Mother Teresa Mercy Endowment



CATHEDRAL PARISH OF ST. RAPHAEL ENDOWMENT

“The endowment is very important to the life of the parish. We are grateful to have the endowment for the financial assistance it provides.”

– TOM MECUM, CATHEDRAL PARISH STAFF



ST. DENNIS CATHOLIC EDUCATION ENDOWMENT

Dr. Allen Hunt of Dynamic Catholic presented “Passion and Purpose for Marriage” to a full church at St. Dennis in April 2017. Dr. Hunt, a former pastor in a mega church for over 20 years was received into the Catholic Church in 2008. Since then, he has been writing, preaching, and teaching in various venues across the nation. Dr. Hunt's visit to St. Dennis was made possible with support from the St. Dennis Catholic Education Endowment.

“I appreciated the reminder that marriage is a relationship of three, where God calls us to help bring out the best in our partner. Having that third party involved is so meaningful and holds us to a higher standard.”

– MICHELLE AND CHAD, ST. DENNIS PARISHIONERS

APOSTOLATE FOR PERSONS WITH DISABILITIES – DIOCESE OF MADISON ENDOWMENT

Each year, the Apostolate for Persons with Disabilities awards grants throughout the Diocese to parishes, schools, and programs that minister to and better accommodate people with disabilities. These grants are made possible through the Apostolate for Persons with Disabilities – Diocese of Madison Endowment.

Accessibility Updates at St. John the Baptist Church, St. Francis Assisi Parish, Jefferson

St. Francis Assisi Parish in Jefferson has the unique opportunity of welcoming their neighbors from the Catholic community at St. Coletta of Wisconsin, a service organization offering support for adults with developmental disabilities. Many residents from St. Coletta call St. John the Baptist their home church. This year, with a grant from the Apostolate for Persons with Disabilities, the church completed construction projects making the church more accessible to persons with disabilities.

Blessed Margaret of Castello Dinner

With the support of a grant inspired by Blessed Margaret of Castello, provided by the Apostolate for Persons with Disabilities, Blessed Trinity Catholic Parish hosted a Blessed Margaret Dinner for parishioners with disabilities at St. Patrick Church, Lodi, in May 2017. The dinner gave parishioners living with disabilities a chance to gather for prayer, a meal, and the opportunity to share accomplishments from their lives.



“St. Coletta of Wisconsin serves over 250 persons integrated into the Jefferson community, many with disabilities that would prevent their attendance at Mass had it not been for the completion of this project. The updates at St. John the Baptist communicate to persons with a disability, ‘You are welcome here!’”

– TED BEHNCKE, PRESIDENT OF ST. COLETTA OF WISCONSIN & PARISHIONER OF ST. FRANCIS OF ASSISI PARISH



“The evening truly was inspirational! It was a beautiful, heart-filling experience hearing the individual stories of parishioners of all ages, from teens to octogenarians. I was struck by their courage and marvelous accomplishments and touched to share in the joy of the evening.”

– MARGO STRATTON, PARENT

EDUCATION ENDOWMENTS

Provide funding to support parish faith formation, Catholic schools, and tuition assistance

- St. Clare of Assisi Parish and St. Victor School Endowment, Monroe
- St. Dennis Catholic Education Endowment, Madison
- St. John Vianney Cure of Ars School Endowment, Janesville
- St. Joseph Catholic School of Baraboo Endowment, Baraboo*
- St. Mary Parish School Endowment, Bloomington
- St. Patrick Congregation of Janesville Tuition Assistance Endowment, Janesville

DESIGNATED FUNDS

Provide investment assistance to parishes with the option to fully expend funds

- St. Albert the Great Parish Non-Ended Designated Fund, Sun Prairie*
- St. Olaf Parish Non-Ended Designated Fund, Deforest
- St. Peter Parish of Madison, Wisconsin Non-Ended Designated Fund, Madison
- Pope Saint John Paul II Cathedral Fund, Madison

*Indicates fund was accepted into the CDMF after June 30, 2017.



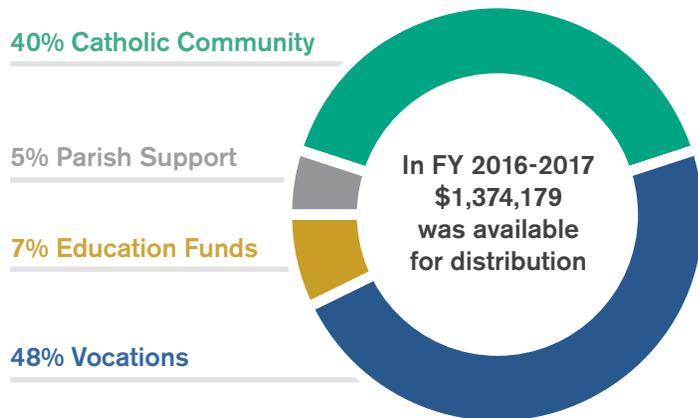
We will faithfully and skillfully create opportunities for the CDMF to benefit the mission of the Church

Distributions from the CDMF

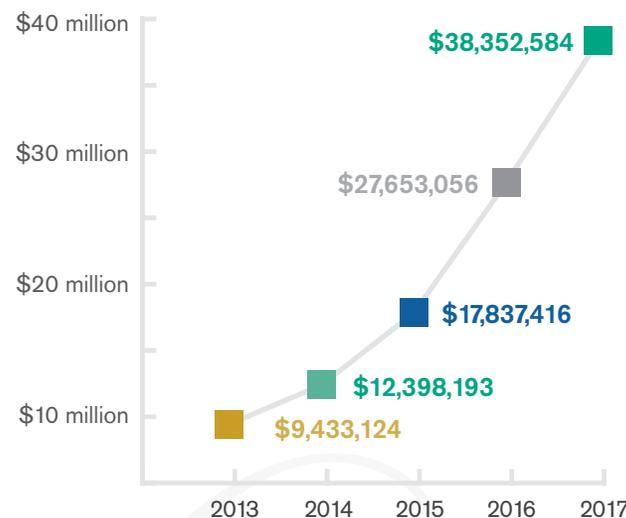
*Amount available for distribution includes recipients who chose to either defer receipt or to reinvest their available distribution. Total cash distributed amounted to \$656,667 calculated as of June 30, 2017.

*In addition to the \$1,374,179 represented, another \$638,190 was available to fund holders who before FY 2016-2017 chose to defer receipt or reinvest their available distribution.

*Queen of Apostles Vocation Endowment Fund does not currently offer an annual distribution but provides ongoing support to seminarian tuition assistance and is not reflected in the percentages above.



CDMF Assets Under Management



For a complete review of the CDMF 2016-2017 financial statements with independent auditors' report, please visit diocesemadisonfoundation.org.



“The parish endowment is a good avenue for parishioners to invest in a carefully managed fund for the long term benefit of the parish. It allows people to make a bigger donation or bequest knowing that their donation will help sustain the parish or school into the future. As a pastor with a parish school, the annual distribution from the endowment is always welcome news for our budget. Working with the CDMF assures that not only will our funds be managed prudently, but also that they will be invested with institutions that align with our Catholic moral teachings. Moreover, the CDMF staff is very attentive to each individual parish and works with the parish leadership in a very professional way to achieve their goals and objectives for their investments.”

— VERY REV. PAUL UGO ARINZE, V.F.
PASTOR, ST. JOHN VIANNEY CATHOLIC PARISH

“We're blessed to serve those in need across the Diocese of Madison through the CDMF. The endowment funds managed by the CDMF provide a solid financial future to continue the charitable works of the Catholic Church. The Saint Mother Teresa Endowment Fund is a recent example of this in action. The fund was established to fulfill a request by Pope Francis for a lasting work of mercy in our Diocese. Bishop Morlino, in collaboration with CDMF leadership and the Board of Directors, has directed the use of the Saint Mother Teresa fund to support the works of mercy, including the homeless community in our Diocese. Our work today is building up the Church for generations to come.”

— MATTHEW GONNERING, CDMF DEVELOPMENT COMMITTEE, HUSBAND, FATHER, ST. JOHN THE BAPTIST PARISHIONER, WAUNAKEE



Board of Directors

THE CATHOLIC DIOCESE OF MADISON FOUNDATION BOARD OF DIRECTORS

An independent Board of Directors governs all operations and affairs of the CDMF. The current board members include the Bishop of Madison, the Vicar General of the Diocese of Madison, the Chancellor of the Diocese of Madison, and 15 independent board members from throughout the Diocese.

**Most Rev.
Robert C. Morlino**
Chairman of the Board
Bishop of Madison

**Rev. Msgr.
James R. Bartylla**
Vicar General
Diocese of Madison

William Yallaly
Chancellor
Diocese of Madison

Michael Arbet
Senior Portfolio Manager
Milestone Investment
Advisors, Sacred Hearts of
Jesus and Mary, Sun Prairie

Richard Brachman
Retired Market Chairman
Town Bank, Queen of
Peace, Madison

Dennis Breunig
CPA/Partner, Smith &
Gesteland, LLP
St. Mary Parish, Pine Bluff

**Rev. Msgr.
Michael Burke**
Pastor Emeritus
St. Maria Goretti Parish,
Madison

Ann Casey
VP Finance and
Operations, Madison
Community Foundation
St. Maria Goretti Parish,
Madison

Mark Cullen
Chairman, J.P. Cullen &
Sons, Inc., St. John Vianney
Parish, Janesville

Philip Galassie
Retired COO/Partner,
Baker Tilly Virchow Krause,
LLP, St. John Vianney
Parish, Janesville

Matthew Gonnering
CEO, Widen Enterprises
St. John the Baptist Parish,
Waunakee

Elaine Hathaway
Retired CPA, Family
Charitable Fund Advisor
St. Bernard Parish,
Middleton

Paul Jadin
President, Madison Region
Economic Partnership
St. Maria Goretti Parish,
Madison

Matthew Lee
Sr. Counsel
Foley & Lardner, LLP
St. Thomas Aquinas Parish,
Madison

Joseph Leone
Attorney, DeWitt
Ross & Stevens
Cathedral Parish,
Madison

Mark Meloy
CEO, First Business Bank
St. Maria Goretti Parish,
Madison

James Rosemeyer
Owner/Investment Advisor,
Rosemeyer Management
Group, St. Mary Parish,
Platteville

Rev. Randy Timmerman
Pastor, St. Dennis Parish,
Madison

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Catholic Diocese of
Madison Foundation

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Visit us online to make a gift today
www.diocesemadisonfoundation.org

Thank you to our fund holders and the Catholic Herald for contributing photos included throughout this report.