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CDMF

Catholic Diocese of
Madison Foundation



Together we can do more

It is a great joy to share with you The Catholic Diocese of Madison Foundation's (CDMF) Annual Report for the 2018-2019 fiscal year. This year seemed to fly by for us and we've witnessed many great blessings. We have continued to see steady growth in the CDMF's assets, celebrating the close of the fiscal year having surpassed \$50 million. Five new funds have been added to support the parishes, schools, and ministries which faithfully serve the people of our diocese and our Church. Also, I'd personally like to welcome Most Reverend Donald Hying, as Bishop of Madison and Chairman of the CDMF Board. We are all looking forward to working with you!

This year grants were given out to all nine vicariates in support of corporal and spiritual works of mercy. Next year two new funds will award grants for works of mercy and Catholic K-8 tuition assistance. Hearing the stories and persistent faith of the individuals of our diocese is the most inspiring part of what we get to do. We look forward to seeing the impact each of our funds continues to have. Every contribution received, grant awarded, and individual we meet is a grace-filled opportunity to share the light of Christ!

On that note, I'd like to thank each donor, fund holder, and friend of the CDMF whose support makes what we do possible. We are overwhelmed by the generous hearts, faith, and service of the organizations and individuals in our diocese. We look forward to serving every corner of our diocese and the heart of every home.

A handwritten signature in white ink that reads "Ann Casey". The signature is fluid and cursive, with a long, sweeping tail on the letter "y".

Ann Casey
President

Catholic Diocese of Madison Foundation





The CDMF fosters giving as a way of life, serving the 11 counties within the Diocese of Madison. We serve as a long-term funding source in direct support of our diocese. And we faithfully create opportunities for the CDMF to benefit the mission of the Church.

We will build trust.

We will make giving easier.

We will adhere to Catholic values.



The CDMF continues to gain momentum. It is inspiring to see the variety of gifts being initiated from various parishes, schools, and individual families of the Diocese. The Foundation is eager to expand its reach and assist in spreading the message of

“Love never fails.”

- Fr. Randy Timmerman
CDMF Development Committee

Catholic Ministry Endowments

Apostolate for Persons with Disabilities, Diocese of Madison

Provides support to programs serving individuals with disabilities and their families

John J Karsten Memorial, Platteville

Provides assistance to individuals with disabilities at St. Mary's Parish

McDonald Family Matthew 25:31-46

Provides support for the works of mercy, as listed in Matthew 25, within Rock County

Saint Mother Teresa Mercy, Diocese of Madison

Provides support for the corporal and spiritual works of mercy

Vocation Endowments

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

Priests for Our Future

Queen of Apostles Vocations

Education Endowments

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

Hathaway Family Tuition Assistance,
Diocese of Madison

John Paul Cullen Memorial Scholarship,
Janesville

St. Clare of Assisi Parish and
St. Victor School, Monroe

St. Dennis Catholic Education, Madison

St. John Vianney Cure of Ars School,
Janesville

St. Joseph School, Baraboo

St. Mary School, Bloomington

St. Peter School, Ashton*

Parish Endowments

Provide funding to parish programs and services

Cathedral Parish of St. Raphael, Madison

Queen of All Saints, Fennimore

Ralph Ringelstetter Memorial
(Divine Mercy), Sauk City

St. Ann, Stoughton

St. Mary, Pine Bluff

St. Michael the Archangel, Mt. Horeb

St. Olaf, DeForest

St. Thomas Aquinas, Madison

St. Thomas Aquinas Capital Improvement,
Madison

Non-Endowed Funds

*Provide support for parishes or capital projects,
with the option to fully expend funds*

Bishop Robert C. Morlino Memorial,
Diocese of Madison

Pope Saint John Paul II Cathedral,
Diocese of Madison

St. Albert the Great, Sun Prairie

St. Augustine, Footville

St. Joseph, East Bristol

St. Olaf, DeForest

St. Paul, Evansville

St. Peter, Ashton*

St. Peter, Madison

St. Martin of Tours, Martinsville*

Donor Advised Endowments

*Provides support for Catholic philanthropic
causes within the Diocese of Madison*

Gonnering Family

*Indicates fund was accepted
into the CDMF after June 30, 2019.

Learn more about what we're up to and see what's going on in our diocese!

facebook.com/DioceseMadisonFoundation
www.DioceseMadisonFoundation.org

CDMF Catholic Diocese of Madison Foundation

We're celebrating mercy this week! Grants from the Mercy Fund have been given to multiple St. Vincent de Paul councils throughout the diocese. When Bishop Hying visited St. Joseph's Parish a few weeks ago, he announced the grant to the SVDP council in Baraboo!



Works of Mercy

13

2 Shares

CDMF Catholic Diocese of Madison Foundation

It's always a joy to run into a couple of our fantastic Board members and one of our Diocesan friends while attending a cross country meet!!



7

1 Share

CDMF Catholic Diocese of Madison Foundation

Beautiful night to visit St. Mary's in Platteville!



22

3 Comments 2 Shares

The Priests for Our Future endowment emboldens the men being called to the priesthood by supporting recruitment, education, and formation of seminarians studying to serve the Diocese of Madison. We are grateful for the gracious support the people of the diocese have shown. Join me in praying for the dedicated young men studying to be future shepherds of our Church.

- Fr. Greg Ihm, Director of Vocations
Diocese of Madison



Seminarians

2018-2019

- 23 seminarians
- 3 men ordained priests
- 3 men ordained transitional deacons

2019-2020

- 3 new seminarians

We seminarians are eternally grateful for the tremendous outpouring of support we receive from the incredible people of the diocese. For me, it has personally fostered a deeper love for Jesus Christ and a greater excitement to give my life in service as a priest.

- Deacon Tim Mergen, Seminarian



An endowment is an opportunity to leave a legacy of your faith, either during your lifetime or as a bequest. Legacy funds can serve a specific ministry such as a parish, works of mercy, or evangelization efforts, or serve different Catholic organizations each year, through a donor advised endowment.

Sarah and Matthew Gonnering (pictured above with their family) established the *Gonnering Family Donor Advised Endowment* to support the future of the Church while teaching their children about the importance of stewardship.

Pat and Kathy McDonald established the *McDonald Family Matthew 25:31-46 Endowment* to serve the parishes of their home, Rock County, in fulfilling corporal works of mercy as referenced in the Gospel of Matthew.

“Amen, I say to you, whatever you did for one of these least brothers of mine, you did for me.” Matthew 25:40

St. Thomas Aquinas Parish, Madison

Our Make Disciples Capital Campaign has three priorities: repair and upgrade common spaces used by the majority of our people; build a \$1 million Endowment Fund; and enhance and remodel our Education Wing, transforming it into an Enrichment Center that serves parishioners of all ages. The endowment is a key focus of the campaign because it's our opportunity to impact the future of our parish and the Church. We hope this will eliminate the need for future fundraisers every time there is a major maintenance repair or capital improvement. The endowment is a permanent investment and the annual interest income helps us carefully plan the maintenance of our buildings and property. With our maintenance costs endowed and the improvements to our campus, this will allow us to continue to effectively evangelize all those who worship with us as we continue to grow as a parish family.

- Fr. Bart Timmerman, Pastor
St. Thomas Aquinas Parish, Madison





Mercy Fund

Over 20 grants and \$32,000 was awarded from the Saint Mother Teresa Mercy Endowment to support corporal and spiritual works of mercy being performed throughout the diocese. Grants assisted organizations such as Catholic Charities' The Beacon, a homeless day resource center; Hope Haven, assisting those suffering from addiction; St. Vincent DePaul parish conferences; and food pantries. Grants from the fund enable the Bishop to support organizations spreading mercy. These funds help serve grieving families, migrant workers, the sick, and many others in our diocese.



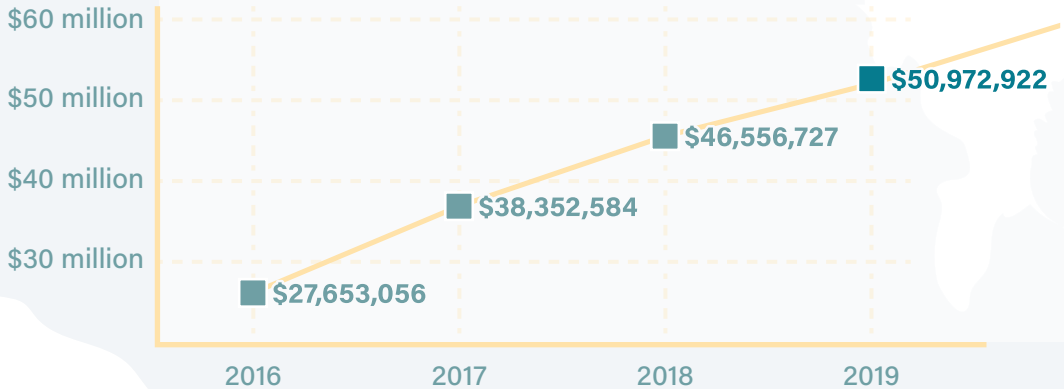


Apostolate for Persons with Disabilities

The Apostolate for Persons with Disabilities – Diocese of Madison, awards grants throughout the diocese to parishes, schools, and organizations to support their efforts to fully include persons with disabilities in the life of the Church. In the 2018-2019 fiscal year, the Apostolate awarded 25 grants totaling \$256,890 for programs and services including the installation of hearing loop systems, building accessibility improvements, outreach to Hispanic persons with disabilities, assistance for Catholic school students with reading challenges, and deaf ministry.

Assets

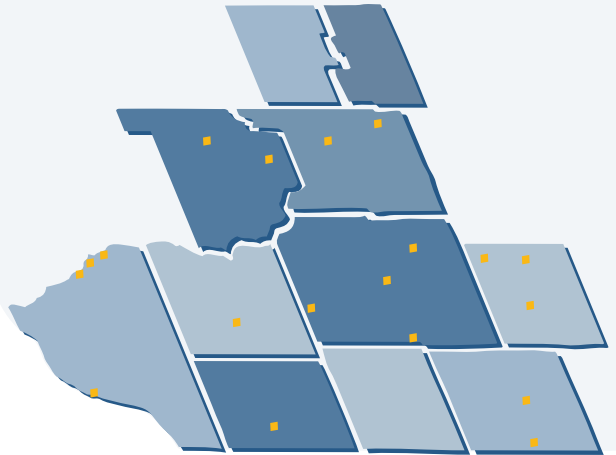
For a complete review of the CDMF 2018-2019 audited financial statements, visit diocesemadisonfoundation.org



Grants

Over 20 grants were awarded from 2018-2019 distributions throughout all nine vicariates of the Diocese of Madison.

Squares represent areas grants were awarded to organizations or parishes performing works of mercy.





Parishes

supported parish programs and services

Ministries

assisted ministries performing works of mercy & those supporting people with disabilities



Distributions

\$2,205,199

distributed to fund holders in the 2018-2109 Fiscal Year

Education

supported parish faith formation programs and Catholic schools



Vocations

aided vocations recruitment, education, and formation



Investing in Our Future

The CDMF maintains a professionally managed and broadly diversified investment portfolio under the professional management of U.S. Bank. The CDMF's portfolio is invested in accordance with the CDMF's established objectives and guidelines.

These include:

- Long-term focus on performance to preserve the CDMF's purchasing power and to cover distribution needs
- Proper diversification to reduce risk and to achieve higher returns through all market cycles
- Adherence to the socially responsible investing policies set forth by the U.S. Conference of Catholic Bishops

Perform

Diversify

Adhere

The CDMF offers many ways to support the Catholic parishes, schools, and ministries of our diocese that shape our faith. Consider how the CDMF can partner with you to strengthen our diocese and make a lasting impact.

Giving now:

- Support a parish, school or ministry by making a gift to an existing fund
- Make a monetary gift by mail
- Transfer appreciated securities
- Make a gift online (checking account or credit card)
- Establish an endowment to memorialize a meaningful event in your life
- Utilize your IRA Required Minimum Distribution or a Donor-Advised Fund

Planning for the future:

- Designate an endowment as the beneficiary of your life insurance policy or retirement plan
- Remember an existing endowment or the CDMF in your will



Ways to Give



Meet our Team

Most Rev. Donald J. Hying
Chairman of the Board
Bishop of Madison

Rev. Msgr. James Bartylla
Vicar General
Diocese of Madison

William Yallaly
Chancellor
Diocese of Madison

Ann Casey
CDMF President
Retired VP Finance & Operations
Madison Community Foundation
St. Maria Goretti, Madison

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

Richard Brachman
Retired Market Chairman
Town Bank
St. Bernard, Middleton

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

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

Leadership

An independent Board of Directors governs the CDMF. Board members include the Bishop of Madison, Vicar General, and Chancellor, along with independent board members who represent different walks of life, professional experience, and regions of the diocese. Five standing committees exist to assist with the CDMF's functions: Executive, Investment, Development, Audit and Governance, and Grant Review.

Phil Galassie

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

Chuck Gilbert

Retired Dir. of Sales & Marketing Strategy
Hendricks Holding Co.
St. Jude, Beloit

Matthew Gonnering

CEO
Widen Enterprises
St. John the Baptist, Waunakee

Elaine Hathaway

Retired CPA
Family Charitable Fund Advisor
St. Bernard, Middleton

Matthew Lee

Partner
Foley & Lardner LLP
St. Thomas Aquinas, Madison

Joseph Leone

Partner
Dewitt, LLP
St. Mary, Pine Bluff

Mark Meloy

CEO
First Business Bank
St. Maria Goretti, Madison

James Rosemeyer

CEO
Rosemeyer Management Group
St. Mary, Platteville

Rev. Randy Timmerman

Pastor
St. Dennis, Madison

Terry Warfield

PwC Professor & Chair of Accounting Dept.
UW-Madison
Blessed Sacrament, Madison



Our Team

What a blessing it is to be part of the faithful work of our parishes, schools, and ministries! Our dedicated team looks forward to serving you and spreading the light of Christ throughout the diocese.

Erin Kerns

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Ann Casey

President

608.821.3048

President@diocesemadisonfoundation.org

*Learn more about our team at:
diocesemadisonfoundation.org/Aboutus*

The CDMF is an effective way to ensure the flourishing of our parishes, schools, priests, and charitable activities for decades to come. The mission of the Church is to evangelize the world, to invite everyone into a living relationship with the Son of God. The resources and leadership of the Foundation fuel this essential effort in our local Church with ever-growing fervor and fruitfulness.

-Most Reverend Donald Hying, Bishop of Madison
Chairman of The CDMF

The resources and leadership of the Foundation fuel this essential effort in our local Church with ever-growing fervor and fruitfulness.

Having our parish funds with the CDMF gives me and my parishioners the confidence that our money is legally secure, responsibly invested, and will grow to continue serving the needs of the parishes and the school for generations to come.

- Fr. Chris Gernetzke, Pastor
St. Martin Parish and
St. Peter Parish and School





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

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

