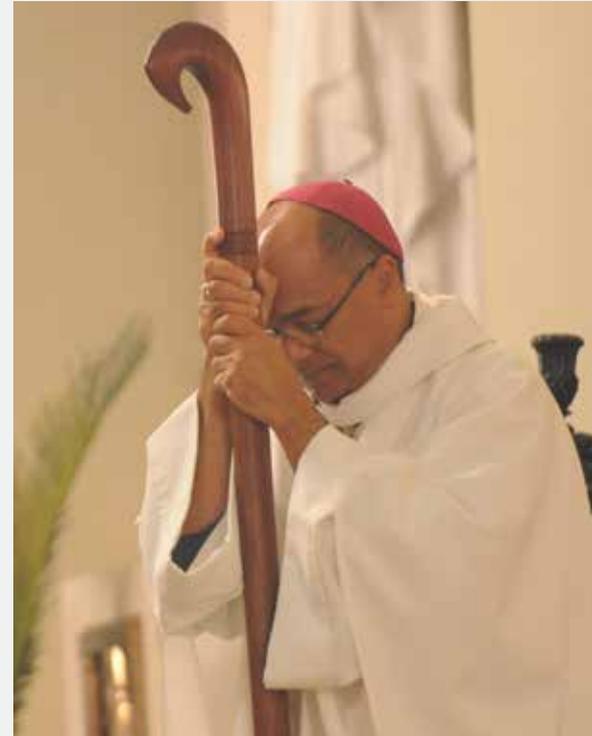




**CATHOLIC**  
**FOUNDATION**  
OF SOUTH LOUISIANA



# 2017 ANNUAL REPORT



- Most Rev. Shelton J. Fabre

## MESSAGE FROM THE BISHOP

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**My friends in Christ,**

The year 2017 has truly provided great hope for the Diocese of Houma-Thibodaux and the Catholic Foundation of South Louisiana. Through our Diocesan Strategic Planning “Plans of Hope,” we have reinvigorated the Catholic Foundation in an effort to provide a powerful instrument to our Diocese, to assist with the gifts the Lord has bestowed upon us.

The Catholic Foundation serves as a great resource to our Diocese, and for our donors to give financially through the Foundation to their desired ministry. It was established to ensure that the ministries of the Diocese of Houma-Thibodaux can grow and thrive, thereby seeking to ensure a bright future for our ministries. The Diocesan Capital Campaign, which took place a few years ago, helped to create our two largest endowments with the Catholic Foundation benefiting Seminarian Education and Catholic Charities, raising over \$5 million dollars. We are incredibly grateful for those who supported the Capital Campaign, our seminarians, and Catholic Charities.

Over the last year, the board and staff of the Catholic Foundation have been working to provide great vehicles to make charitable giving simple and impactful. The Catholic Foundation’s assets total \$5.3 million for the fiscal year ending June 2017, supporting a number of ministries throughout our Diocese. This past fall of 2017, the Catholic Foundation distributed \$159,103 back to the ministries who have endowments established, and we are eager to continue to give back in an effort to financially sustain and enhance our many ministries.

We want to express our sincerest gratitude for the faith and generosity of the benefactors who trusted in the Catholic Foundation and enabled the Foundation to continue to grow the endowments and support the ministries right here at home. In recognition of our responsibility to share how your gifts are bearing fruit here in the Diocese, we are pleased to present our 2017 Annual Report. We look forward to being of service to our Diocese and remain grateful for the support of our community. With gratitude for your generosity and prayers, be assured of our prayers for you!

Sincerely in the Lord,

**MOST REV. SHELTON J. FABRE**  
BISHOP OF THE DIOCESE OF HOUMA THIBODAU

**CHARLOTTE BOLLINGER**  
CHAIRMAN OF THE BOARD



## MESSAGE FROM THE EXECUTIVE DIRECTOR

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Pope Francis once said, “Go out to every man and woman, bringing the goodness and tenderness of God.” The Catholic Foundation of South Louisiana was strengthened over the past year in an effort to bring our Diocese together as one to serve in the Lord’s mission while ensuring that the ministries we serve, have a vibrant and fruitful future.

Throughout the past year, the Catholic Foundation has been working on setting a solid foundation for the different charitable giving vehicles that we are able to offer. The Board of Directors and the Foundation’s staff have renewed all policies and procedures, have analyzed all funds to ensure prudent investments that follow Catholic social teaching, and continue to work to ensure transparency for all donors.

With Bishop Fabre’s guidance the Board of Directors has grown adding several community members who are committed to the growth of our Foundation and Diocese. The board meets regularly to ensure the prosperity of the Foundation’s growth. In addition, the Catholic Foundation created its inaugural Advisory Council made up of professional advisors from different backgrounds who are dedicated to assisting our many ministries and donors through their charitable giving.

Communications efforts were increased substantially through rebranding our Foundation, development of marketing collateral, social media, eNews and key community partnerships to help educate the community on the resources available to them. As we continue to build and grow the Foundation, we will begin to offer key seminars for parishes and schools to further develop relationships with the ministries we serve.

It is truly an exciting time to be a part of our Diocese and our Foundation as we renew our parishes, form missionary disciples, and build a solid foundation for the many ministries throughout the Diocese of Houma-Thibodaux. Our Foundation is eager to work with each ministry to assist in their financial goals and is excited to build the Catholic Foundation throughout our community providing a beacon of hope for so many.

Sincerely,

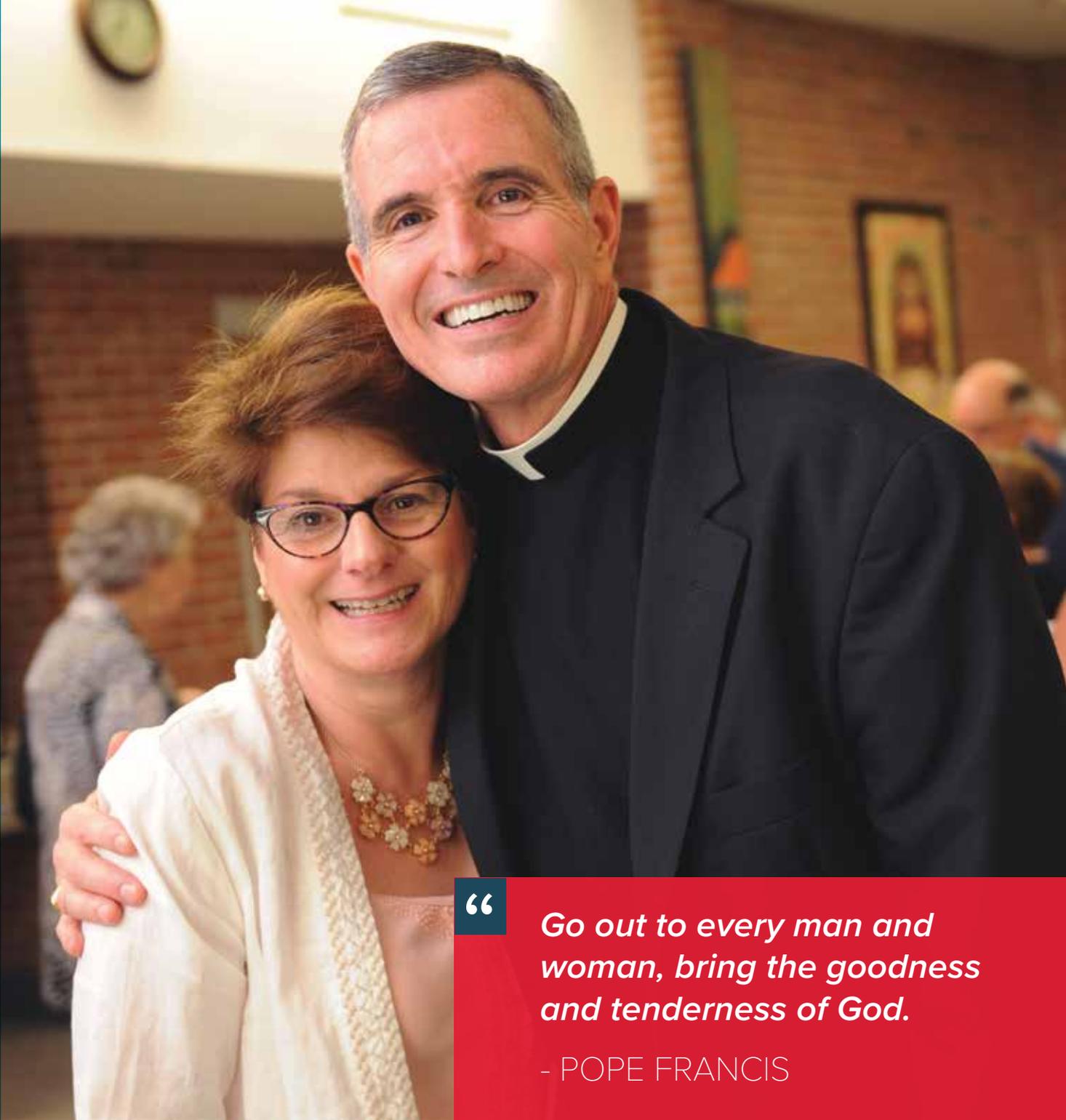
**AMY PONSON**  
EXECUTIVE DIRECTOR



## FOUNDATION MISSION

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The Catholic Foundation of South Louisiana is committed to **FINANCIALLY SUSTAINING** and **ENHANCING** the charitable, educational and spiritual ministries of the Diocese of Houma-Thibodaux.



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*Go out to every man and woman, bring the goodness and tenderness of God.*

- POPE FRANCIS

## BENEFITS TO OUR DONORS

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### WILLS AND ESTATE PLANNING ASSISTANCE

The Catholic Foundation partners with attorneys, and tax and estate planning experts to offer donors assistance and expertise with their wills and estate planning needs.

### FAVORITE MINISTRY

The Catholic Foundation encourages donors to give through the Foundation to their favorite ministry of choice, making philanthropic giving simple and impactful. A donor can earmark their gift for a specific beneficiary or can make an unrestricted gift to serve the general purpose of the Catholic Foundation.

### TAX ADVANTAGE TO DONORS

The Catholic Foundation of South Louisiana is a 501 (c) (3) nonprofit, which is able to offer donors tax benefits for their charitable giving.

### PROFESSIONAL FUND MANAGEMENT

The Catholic Foundation of South Louisiana's Board of Directors and the Finance Committee provides oversight and professional management of all funds. The Catholic Foundation uses Mission Diocese Fund for its investments and offers reporting and transparency to all donors.

### REPORTING TO DONORS

Monthly, quarterly and/or annual reporting is made available and transparency to our donors is a top priority.

### HONOR/MEMORIAL GIFTS

The Catholic Foundation of South Louisiana makes it easy to leave a legacy, as well as making gifts to remember or honor a loved one by naming a specific fund, which provides a perpetual gift to the donor's favorite ministry.

### GIFTS THAT KEEP ON GIVING

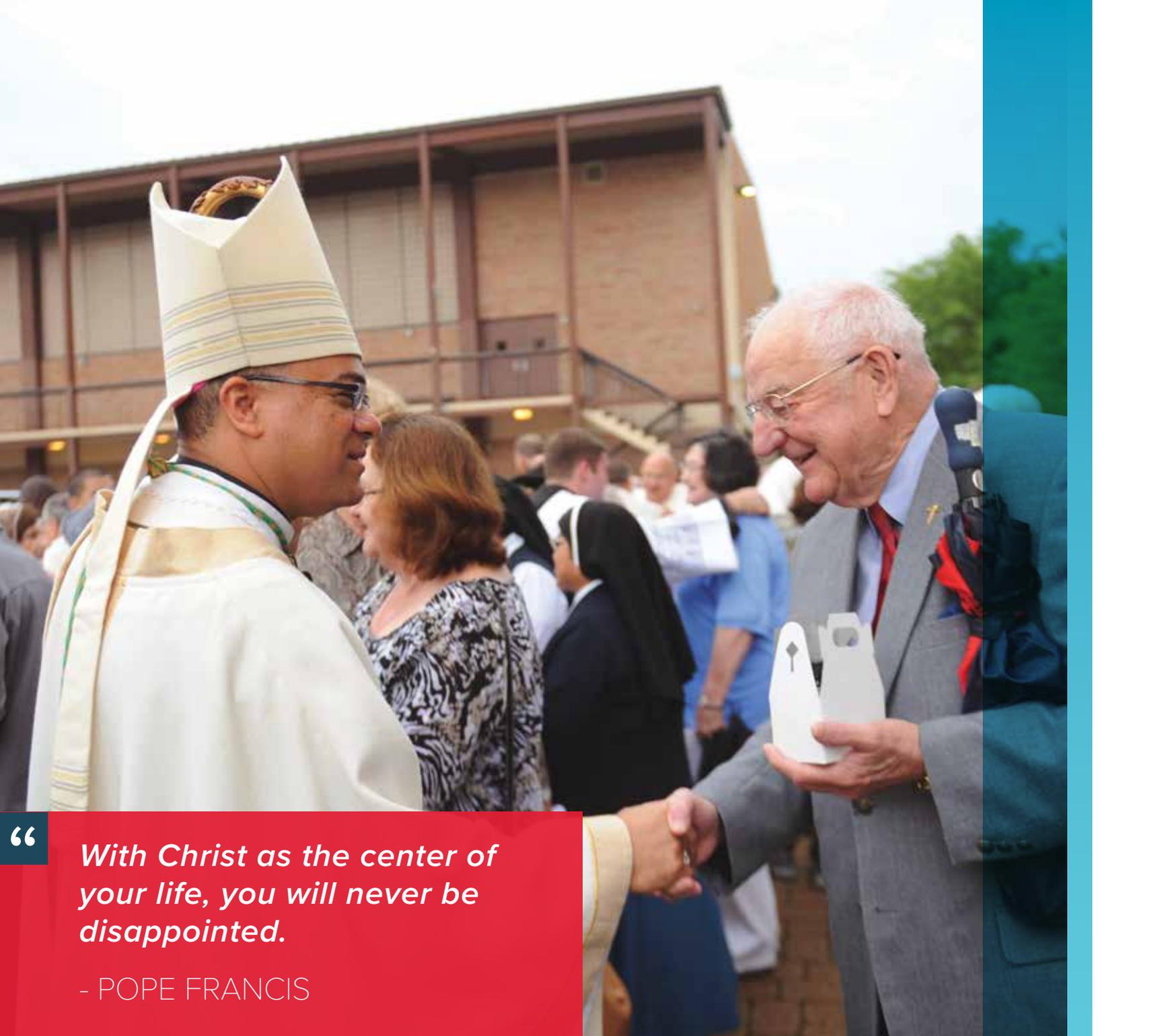
There are a variety of planned giving vehicles that continue to work forever by using only the income earned while the keeping the principal of the fund intact.

# A GUIDE TO YOUR PHILANTHROPIC GIVING

Our board and staff of the Catholic Foundation of South Louisiana is eager to work with you, your family and your professional advisors in making charitable giving **SIMPLE** and **IMPACTFUL**.

Please contact our executive director, **Amy Ponson**, for a confidential conversation at **985-850-3116** or **cfsl@htdiocese.org** for more information.

Type of Gift	Donor Benefits	Charitable Cause Benefits
<b>Outright Gift</b>	Receives tax deduction in year of gift.	Can use the gift immediately for organizational needs.
<b>Endowment</b>	Receives tax deduction in year of gift and can memorialize a loved one by naming the endowment.	Receives a perpetual source of support for the ministry, e.g., scholarships.
<b>Donor Advised Fund</b>	Receives immediate tax deduction in year of gift and advises distributors in subsequent years to 501 (c)3 entities of donor's choice.	Can receive gifts to benefit ministry at any time.
<b>Charitable Gift Annuity</b>	Is guaranteed fixed income for life, portion of income tax-free, immediate tax deductions.	Benefits from the residual of the annuity.
<b>Bequest</b>	Receives possible estate tax deduction, perpetual gift opportunity.	Bequest could be held in perpetuity and invested to fund ministry's needs.
<b>Life Estate</b>	Immediate, substantial tax deduction of fair market value; retains and maintains use of property; estate tax benefits.	Property transfers to charitable cause when donor's life estate ends.
<b>Charitable Remainder Trust</b>	Receives variable or fixed income, deferred income if desired, also possible income and estate tax deductions.	Upon death of the donor or last surviving income beneficiary, the ministry receives remaining assets.
<b>Charitable Lead Trust</b>	At end of trust period, principal returns to donor or other beneficiaries, principal can pass to others with little or no shrinkage, possible income and estate tax deductions.	Receives income for duration of trust.
<b>Retirement/IRA</b>	Receives estate and income tax savings for substantial portion of gift.	Benefits by significant gift upon the death of the donor.
<b>Insurance Policy</b>	Receives income tax deduction for value of policy when transferred, premium payments may be deducted as gifts, also possible income and estate tax deductions.	Receives full face value of policy upon the death of the donor, or may receive current surrender value prior to donor's death.



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*With Christ as the center of your life, you will never be disappointed.*

- POPE FRANCIS

## CAPITAL CAMPAIGN UPDATE

Due to the great foresight of Bishop Sam G. Jacobs and his desire to establish and build an endowment to ensure the future of seminarians and Catholic Charities within our Diocese, the Catholic Foundation of South Louisiana was formed.

In 2013, our Diocese participated in a Capital Campaign project which inspired our parishioners to charitably give in support of Seminarian Education and Catholic Charities raising over **\$5,300,000**. A percentage of each gift received through the capital campaign was also gifted back to support the great ministries happening in each church parish. Funds raised in support of the Capital Campaign are managed by the Catholic Foundation of South Louisiana, and continue to grow as donors throughout the Diocese continue to support each endowment.

The endowments were established to provide an annual source of income to the intended ministry where the principal remains intact and is never invaded. Anyone who feels compelled to give of their blessings from the Lord to support an endowment can do so at any amount.

Your gifts have helped to grow the Seminarian Endowment to **\$3.2 million** and the Catholic Charities Endowment to **\$1.4 million**. This past fall, the Catholic Foundation of South Louisiana made its first distribution of interest from each endowment. From their general endowment, Catholic Charities received **\$40,834** and our Diocese received **\$95,040** for seminarian education.

For more information about how to support seminarian education and Catholic Charities through an endowment please contact **Amy Ponson**, executive director of the Catholic Foundation at **985-850-3116** or **[cfsl@htdiocese.org](mailto:cfsl@htdiocese.org)** for more information.

### Since 2013

Parishioners have charitably gifted to our Capital Campaign project

**\$5.3 million**

Your gifts have helped to grow

Seminarian Endowments **\$3.2 million**

Catholic Charities Endowments **\$1.4 million**

Gifts back to Charities **\$751,166**

Other Endowments **\$315,883.50**

\*data as of end of fiscal year ending June 2017

## FUND UPDATES

The Catholic Foundation of South Louisiana offers a variety of charitable vehicles to donors and ministries including endowments, custodial funds, donor advised funds and much more. We are honored to work with so many within the Diocese of Houma-Thibodaux to steward your gifts and ensure a great future for so many ministries.

### Endowment Funds

**Bishop Sam Jacobs Seminarian Education Endowment** - This fund was established to support the annual expenses of the education of seminarians of the Diocese of Houma-Thibodaux.

**Breaux-Delaune Catholic Charities Endowment** - This endowment was created to assist with the annual expenses of Catholic Charities.

**Brother Alfred Kolb Vanderbilt Endowment** - This endowment was created to support excellence in teaching at Vanderbilt.

**Brother Ray Kuhn Vanderbilt Endowment** - This endowment was created to fund a partial scholarship to a Vanderbilt student for their senior year.

**Byron E. Talbot Contractor Catholic Charities Endowment** - This endowment was created to assist with the annual expenses of Catholic Charities.

**Catholic Charities of the Diocese of Houma-Thibodaux Endowment** - This endowment was created as part of the 2013 Capital Campaign, where a portion of all undesignated gifts were used to assist with the annual expenses of Catholic Charities.

**Gabrielle Hebert Vanderbilt Endowment** - This endowment was created to fund a scholarship to a graduating senior at Vanderbilt.

**Giardina Family Foundation Catholic Charities Endowment** - This endowment was created to assist with the annual expenses of Catholic Charities.

**Giardina Family Foundation Seminarian Education Endowment** - This fund was established to support the annual expenses of the education of seminarians of the Diocese of Houma-Thibodaux.

**Harold and Gloria Callais Family Endowment** - This endowment was created to assist with the annual expenses of Catholic Charities.

**James J. Buquet, Jr. Family Foundation Seminarian Education Endowment** - This fund was established to support the annual expenses of the education of seminarians of the Diocese of Houma-Thibodaux.

**John and Helen Rizzo Scholarship Endowment Fund** - This fund was established to support tuition assistance for students at Vanderbilt Catholic High School.

**Juliette Martinez Adams EDW Scholarship Fund** - This endowment was established to support tuition assistance of students at E.D. White Catholic High School.

**Marvin and Loretta Marmande Family Endowment** - This endowment was created to assist with the annual expenses of Catholic Charities.

**Mary and Al Danos Foundation Seminarian Endowment** - This fund was established to support the annual expenses of the education of seminarians of the Diocese of Houma-Thibodaux.

**Megan Hitt Vanderbilt Endowment** - This endowment was created to assist with the Vanderbilt Campus Ministry and the Vanderbilt Year Book.

**Morris and Sandra Hebert Family Catholic Charities Endowment** - This endowment was created to assist with the annual expenses of Catholic Charities.

**Msgr. Amedee Seminarian Education Endowment** - This fund was established to support the annual expenses of the education of seminarians of the Diocese of Houma-Thibodaux.

**Our Lady of Prompt Succor, Chackbay Endowment** - This fund was created through gifts made to the parish with the proceeds going to future needs of the parish.

**Seminarian Education Fund for Diocese of Houma-Thibodaux** - This endowment was created as part of the 2013 Capital Campaign, where a portion of all undesignated gifts were used to assist with the annual expenses of the education of seminarians of the Diocese of Houma-Thibodaux.

**St. Genevieve Catholic School General Endowment** - This fund was established to support the general needs of St. Genevieve Catholic School.

**St. Hilary of Poitiers Youth Formation Endowment** - This fund was established to support the annual needs of youth ministry within the parish of St. Hilary of Poitiers, Mathews.

**St. Joseph Co-Cathedral General Endowment** - This fund was established to provide for the general needs of St. Joseph Co-Cathedral.

**T. J. Cantrelle Vanderbilt Endowment** - This endowment was created to fund a partial scholarship to a Vanderbilt student who meets certain criteria including need.

**The Peltier Foundation Seminarian Endowment** - This fund was established to support the annual expenses of the education of seminarians of the Diocese of Houma-Thibodaux.

**Vanderbilt General Fund Endowment** - This endowment was created to assist with the general needs of the school on an annual basis.

**Vanderbilt Student Body Scholarship Endowment** - This endowment was created to fund a partial scholarship to a Vanderbilt underclassman who meets certain criteria.

### Custodial Funds

**Our Lady of the Rosary, Larose Custodial Fund**

### Donor Advised Fund

**Charlotte Bollinger Donor Advised Fund**

**Mike and Renee Gautreaux Donor Advised Fund**

**Wood's Family Donor Advised Fund**

## Highlights of the charitable causes of the ministry.

### SEMINARIAN EDUCATION

Seminarian education remains an ever growing ministry within the Diocese of Houma-Thibodaux. Donors of the Catholic Foundation of South Louisiana have committed to ensuring the education of our future priests by donating over **\$3.2 million** for the Seminarian Endowment.

Our seminarians are the future leaders of our Diocese. This past fall, the Diocese of Houma-Thibodaux received its first annual distribution from the endowment for approximately **\$99,000** making it possible to cover the cost of the tuition of two and a half seminarians.

Our Diocese has been blessed with many local men who have committed their lives to the Lord, one of which is seminarian Daniel Duplantis. Daniel is 23 years old, and born and raised in Bayou Blue.

Daniel is also studying to be a military chaplain for the Air Force. Ever since Daniel was a child he knew he wanted to be a priest, and still holds on to a white stole given to him by Father Thomas Bouterie.

It is the hope of our Foundation that as our Seminarian Endowment continues to grow with the support of our dedicated donors, we will be able to assist our Diocese with an annual perpetual gift to support seminarian education.



- Seminarian Daniel Duplantis

For more information about how to support seminarian education and Catholic Charities through an endowment please contact **Amy Ponson**, executive director of the Catholic Foundation at **985-850-3116** or **[cfsf@htdiocese.org](mailto:cfsf@htdiocese.org)** for more information.

## THANK YOU FOR GIVING CATHOLIC

On #GivingTuesday, the Catholic Foundation of South Louisiana hosted its second annual #iGiveCatholic online giving day for the Diocese of Houma-Thibodaux, on November 28, 2017. We joined 17 other Dioceses across the United States to come together as a Catholic Community and generously give of the Lord's blessings. Together, as a unified Catholic community, you supported 35 participating churches, schools and ministries within the Diocese of Houma-Thibodaux. Through more than **850 gifts** both online and offline, our Diocesan ministries raised over **\$166,800 in just 24 hours**.

We are incredibly grateful for the commitment of our community and their passion for living out the Lord's mission within the Diocese of Houma-Thibodaux. From replacing roofs at churches to new science and technology equipment for schools, your generosity together made a huge impact right here at home.

You gave Catholic, and we THANK YOU!



## STATEMENT OF FINANCIAL POSITION

### ASSETS

Cash and Cash Equivalents	\$52,202
Investments	\$4,770,909
Agency Funds (Investments held for others)	\$541,297
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TOTAL ASSETS	\$5,364,408

### LIABILITIES AND NET ASSETS

#### Liabilities

Payable to Parishes	\$15,930
Payable to Diocese	\$544,054
Agency Funds (Investments held for others)	\$541,297
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TOTAL ASSETS	\$1,101,281

Net Assets	\$4,263,127
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TOTAL LIABILITIES AND NET ASSETS	\$5,364,408

## DONOR SPOTLIGHT

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**MR. ROBERT D. GORMAN**  
EXECUTIVE DIRECTOR OF CATHOLIC CHARITIES

“ *The Catholic Foundation supports any charitable vision within the Diocese – from feeding the hungry, to serving people who are poor, to educating children. Endowments with the Catholic Foundation provide support to the great work Catholic Charities continues to do.*



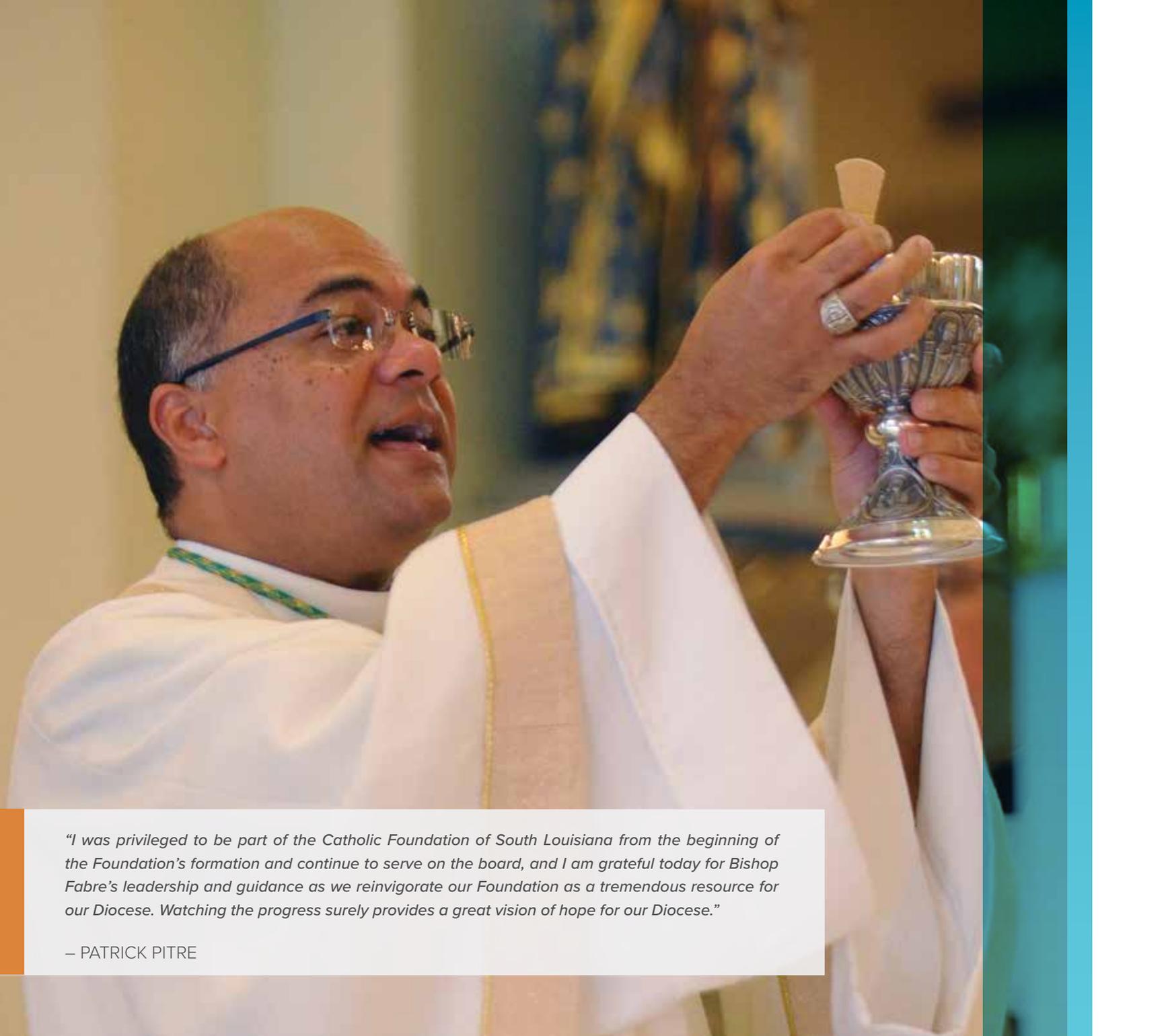
**MR. & MRS. KENNETH WOOD SR.**

“ *We chose the Catholic Foundation of South Louisiana to direct our charitable gifts because it allows us to make one donation and direct funds to multiple entities within our Diocese. Our family is blessed to be able to help those in need and we appreciate the Catholic Foundation’s assistance in making an impact with our gifts.*



**DAVID BOUDREAU**  
VANDEBILT CATHOLIC HIGH SCHOOL PRESIDENT

“ *Vandebilt Catholic chose the Catholic Foundation of South Louisiana to manage our endowments because their mission is to ensure lifelong financial stability of our school. They have ensured transparency and have given VCHS substantial returns on our generous donors’ endowed gifts. The annual distribution we receive from established endowments is supporting our budget and tuition assistance.*



*"I was privileged to be part of the Catholic Foundation of South Louisiana from the beginning of the Foundation's formation and continue to serve on the board, and I am grateful today for Bishop Fabre's leadership and guidance as we reinvigorate our Foundation as a tremendous resource for our Diocese. Watching the progress surely provides a great vision of hope for our Diocese."*

– PATRICK PITRE

## THE CATHOLIC FOUNDATION BOARD OF DIRECTORS

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**Most Rev. Shelton J. Fabre**

**Charlotte Bollinger** – Chairman of the Board

**James J. Buquet, III** – Vice Chairman of the Board

**William 'Bill' Barbera** – Treasurer

**William New** – Secretary

**Jerald Block**

**Bonnie Brady Babin**

**Gloria Callais**

**Rene Danos David**

**Patrick Pitre**

**Father Greg Fratt**

**Very Rev. Mark Toups V.G.**



Several members of Board of Directors join Mr. Boysie Bollinger at Good Leaders Good Shepherds in the fall of 2017.

## ADVISORY COUNCIL MEMBERS

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**Lonny Babin**

**Danny L. Hoychick**

**Thomas J. Meyer, APMA®, CFP®**

**Robert G. Riviere**

**Tim Robichaux**

## STAFF MEMBER

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**Amy Ponson** – Executive Director

**Amy Portier** – Administrative Assistant

