



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

# **Spreading Hope Through Giving**

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**Guide to Giving**



# A Message from the Bishop



The Catholic Foundation of South Louisiana was established to assist the various ministries within the Diocese of Houma-Thibodaux. Its mission is to ensure long-term financial stability for charitable, religious and education institutions of our Diocese. Having a vehicle where our parishioners are able to establish funds that will benefit the various ministries, parishes and schools in perpetuity is a great benefit to the Diocese.

The Foundation serves as a means for the members of the Catholic Community to prayerfully and strategically give of their blessings through the foundation to the causes important to themselves and their families. It provides guidance and manages Planned Gifts, Donor Advised Funds, Endowments and more.

I encourage you to take some time to browse this booklet to learn more about how the Catholic Foundation of South Louisiana can help accomplish your philanthropic goals while helping ministries in our Diocese fulfill the mission of the Lord. You will also find a detailed explanation of the different giving vehicles which provide great benefits to the donor(s) and, ultimately, the ministries they are passionate about.

As you prayerfully consider how your blessings can make an impact in the lives of others, please consider your own baptismal call to be part of the mission of Jesus Christ. In all things, we pray that God will bring to fulfillment the good work that has begun in us.

May God continue to bless you for your faithfulness and generosity.

Sincerely Yours in Christ,

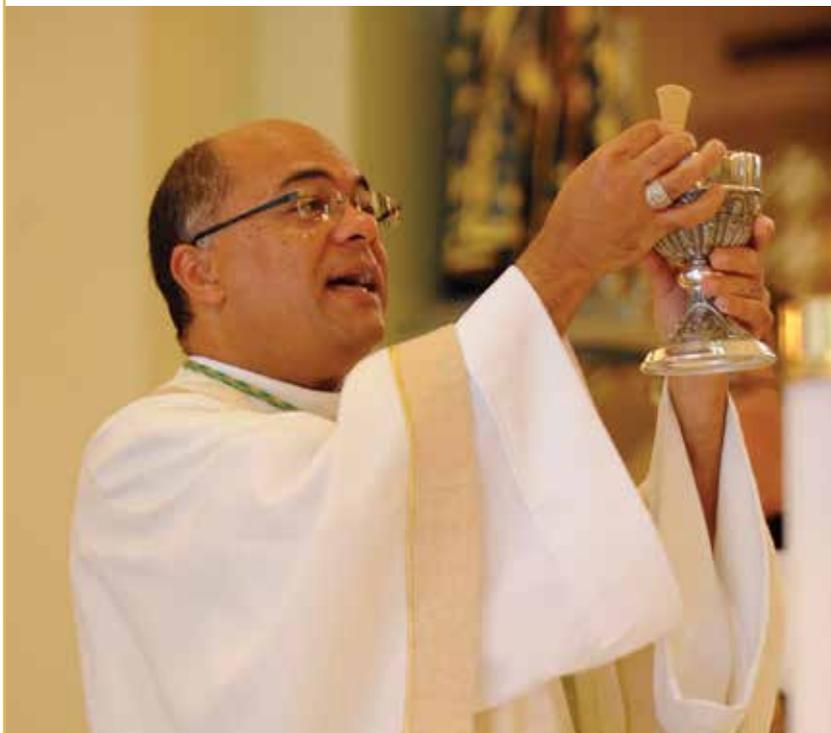
**Bishop Shelton Fabre**  
*Diocese of Houma-Thibodaux*

# Serving One Mission

The Catholic Foundation of South Louisiana assists donors to live out the mission of Christ through their many blessings by promoting philanthropy. The Foundation serves as a resource for the Catholic community to share in their faith in a unique and impactful way to financially sustain and enhance the charitable, educational, and spiritual ministries of the Diocese of Houma-Thibodaux.

*“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. Robert D. Gorman**  
*Executive Director of  
Catholic Charities*



# Join as a Partner in Hope Today

The Catholic Foundation offers donors a way to leave an impactful legacy, in which serves the Lord and aligns with their values and beliefs. While facilitating charitable giving and philanthropy, the Catholic Foundation works together with families to provide assistance in identifying needs within the Diocese and developing a lifelong legacy for the donor. Whether the desire is to feed the poor, cloth the naked, educate our youth, or build a strong church community, your vision and passion can become a reality through the Catholic Foundation of South Louisiana.

The Catholic Foundation is excited and eager to meet you, your family, and your professional advisors to discuss the giving options that work best for you. We offer many different fund options and are happy to work with you to achieve your charitable giving goals. Giving through the Catholic Foundation to your favorite organization(s) will provide for a simple and easy way to make an impact.

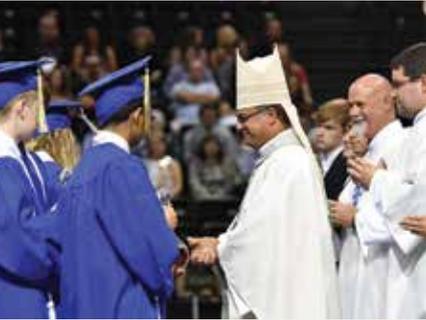


*“We chose the Catholic Foundation of South Louisiana to direct our charitable gifts because it allows us to make one donation and direct funds to multiple entities within our Diocese. Our family is blessed to be able to help those in need and we appreciate the Catholic Foundation’s assistance in making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

**Mr. & Mrs. Kenneth Wood Sr.**



# How Your Gift can Make a Difference



*“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 insured transparency and have given VCHS substantial returns on our generous donor’s endowed gifts. The annual distribution we receive from established endowments are supporting our budget and tuition assistance.”*

**David Boudreaux**  
Vandebilt Catholic High  
School President



The Catholic Foundation offers simple and significantly tax-advantaged alternatives to a private foundation. We prudently invest funds for optimal use in the charitable community and offer flexible giving options tailored to meet your charitable and financial needs. We work with churches, schools, and other ministries to establish endowments which provide consistent and ongoing support.

Gifts may be made through the Catholic Foundation in the form of cash, appreciated securities, real estate, bequests or by naming the Foundation as a beneficiary of your life insurance or retirement plan. Your gift through the Catholic Foundation will translate your charitable intentions into a lasting legacy that will help serve one mission in Christ.



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 Cause, 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 Cause 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 Cause'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 Cause receives remaining assets.
<b>Charitable Lead Trust</b>	At end of trust period, principal returns to Donor of 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 Donors death.
<b>Field of Interest Fund Contribution</b>	Can specify particular areas of interest for funding.	Receives funding for specialized areas of interest.



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

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