
Fostering Generosity, Transforming the Future







Message from our **Leadership**

To our devoted parishioners,

The year 2022 was an exceptional year of transformation through the generosity of our Catholic faithful, and we are thrilled to have had you as part of our journey together. Each day our Foundation reflects on how we can continue to be of service to others, fostering the generosity you continue to entrust us with and connect your passion to the ministries that serve our community.

Service is at the heart of everything we do. It is through the generosity of our donors that the Catholic Foundation of South Louisiana can provide for the future of our Catholic faith and for the many ministries throughout the Diocese of Houma-Thibodaux. The Foundation is of service to protect the gifts the faithful entrust to us. **We make it our mission to know best the needs of the agencies throughout the diocese and to support those who care for the poor, the aged, and the vulnerable.**

Our promise is to always care for you professionally with grace and humility. Although we are legally separate from the diocese, we lend to the Lord as a service for our parishes, schools, and ministries. We are here in service to support the needs of our pastors, our principals and the vision of our bishop. The Foundation is honored to serve the parishes and schools in whatever capacity necessary to perpetuate our Catholic faith for generations to come.

In this edition of our 2022 Annual Report, we highlight ministries in our diocese who are also of service to others. The Catholic Foundation resourced many of our parishes, schools, and ministries ensuring sustainable support each year. I invite you to learn how the Foundation continues to foster generosity to transform tomorrow. Thank you for your continued trust and may the Lord bless you always.



CHARLOTTE BOLLINGER
CHAIRMAN OF THE BOARD



AMY PONSON
EXECUTIVE DIRECTOR



Our Mission

The Catholic Foundation of South Louisiana is a community foundation established to promote philanthropy, empower priests, inspire our community, and ensure long-term financial stability for the charitable, educational, and spiritual ministries of the Diocese of Houma-Thibodaux. Through partnerships with our church parishes, Catholic schools, Catholic Charities and the many impactful ministries throughout our diocese, the Catholic Foundation offers support to help enhance their ministry by establishing a legacy and making a difference in the lives of others.

Why Us?

The Catholic Foundation ensures Catholics a way to leave their legacy uniquely aligned with their Catholic values and beliefs. Donors enjoy the satisfaction of knowing that their gift directly supports the Catholic organizations and nonprofits that they choose.

Who We Serve

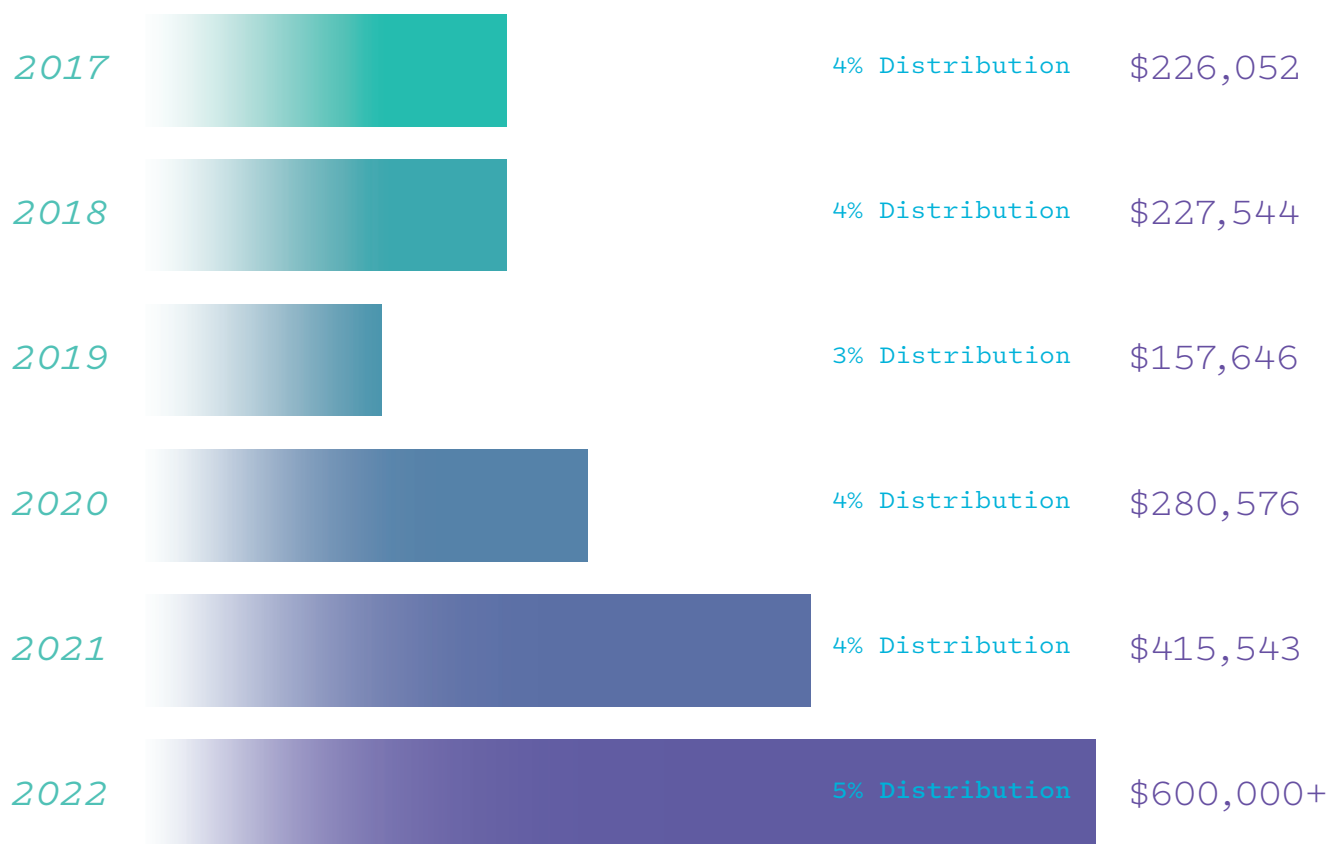
The Catholic Foundation assists donors in creating a meaningful impact through planned giving and charitable fund management. Additionally, the Foundation works closely with the charitable entities that the donors designate as beneficiaries, as well as our church parishes, schools, and ministries to help plan for their financial vitality.

Fostering Generosity *through* Endowment Gifts

In six short years, **more than \$1,307,362.30 has been distributed** to ministries within the Diocese of Houma-Thibodaux in support of our managed funds restricted intent. We take great care to invest your funds wisely and in accordance with Catholic values and beliefs, so they grow over time and support the ministries within our diocese. These endowment grants help to provide a consistent and stable source of funding to ministries like our church parishes,

Catholic Charities and the diocese for seminarian education. And in 2022, we made our maximum distribution of five percent gifting over \$600,000 to restricted ministries. Endowment grant distributions have **helped to educate on average three seminarians every year for the diocese, and have helped Catholic Charities feed and provide financial assistance to hundreds of families each year.**

History of Endowment Distributions *Made to Various Organizations*



Supporting St. Genevieve *through a Beautiful Legacy*

Mr. Larry Benoit was a simple and humble man who loved his community, loved his family, had a love for plants and had a deep faith that was rooted at St. Genevieve Catholic Church. A man who lived a simple life like so many of our Catholic faithful left a legacy for his church through the Catholic Foundation that will support the parish for years to come.

In working with his personal attorney and the Catholic Foundation, Mr. Larry created a legacy through his will leaving his home to the Catholic Foundation to benefit his beloved church parish, St. Genevieve. Upon his passing, the Catholic Foundation inherited his home and was able to sell it based on Mr. Larry's wishes to create a beautiful endowment that now has created perpetual support for his parish.

Through his planning, his church parish was able to benefit greatly from his beautiful generosity using the core competencies of the Catholic Foundation.

Having the Catholic Foundation as our partner has allowed our parish to continue to serve our people while their team is working for the long-term support of our parish behind the scenes. The executive director of the Catholic Foundation kept our parish informed every step of the way, handled all aspects of the estate, and now continues to support our parish through Mr. Larry's thoughtful planning. His passion for his parish continues to live on through his legacy gift.

Very Rev. Eric Leyble, J.V.

Pastor of St. Genevieve





Advancing Students' Minds *of* Tomorrow *through* #iGiveCatholic

St. Genevieve Catholic School has actively engaged with the Catholic Foundation through #iGiveCatholic for years. Each year, the support of their community directly to the school grows substantially allowing the school to accomplish projects year after year while improving the school on many levels. The year 2022 was no different for the St. Genevieve community.

This year, St. Genevieve set out to engage their entire Catholic school community to help advance technology that touches all students in their school. Raising more than \$55,000 with close to 200 donors in 24 hours, St. Genevieve is able to replace their outdated technology and purchase 11 new Interactive SMART Boards and A&E Touch throughout the school.

The generosity of our community is unwavering and the Catholic Foundation is honored to be able to host #iGiveCatholic, providing a great platform and opportunity for our schools and parishes to engage their community and connect their needs with the passion of others. In 2022, the Catholic Foundation engaged more than **2,000 people through #iGiveCatholic, raising more than \$1.7M for local programs and projects within our schools and parishes.** As one of many participating dioceses from across the country we are proud to say that the Diocese of Houma-Thibodaux's generosity continues to lead the country in **Catholic philanthropy as #3 in the country for participating generosity!** We are honored to be able to foster such amazing generosity as we continue to transform our communities for tomorrow.



Launching *our* 'Perpetual Light Society' honoring all who *have* created *a* lasting legacy!

Honoring our past and celebrating our future is at the heart of the mission of the Catholic Foundation. In the fall of 2022, we launched our 'Perpetual Light Society' to honor those members of our community who have pledged lasting gifts through the Catholic Foundation to benefit their church parish, school, diocese or favorite ministry. Our Perpetual Light Society members are models of faith and commitment being good stewards of the blessings the Lord has given them. With a legacy gift, you ensure that future generations experience the joy of your generosity.

Our first annual Perpetual Light Society Mass was celebrated by Very Rev. Patrick J. Madden, diocesan administrator, where we celebrated all of our members as well as presented endowment distributions to ministries. These endowment gifts are made possible by the generosity of thousands who so generously created perpetual endowments sustaining our parishes, schools, and nonprofits.



Creating Sustainability for St. Lucy's Child Development Center *through* *the Generosity of Others*

At the heart of the Catholic Foundation, we are here to create long-term sustainability for the ministries our Catholic faithful love dearly through perpetual endowments.

Of a great many casualties in our area due to COVID-19 and Hurricane Ida, the Bayou Area Children's Foundation, and the Louis Children's Crisis Center, unfortunately, had to close their doors in June 2022. Houma attorneys Mike and the late Louis St. Martin's vision years ago was for a home for small toddlers and young children who were unable to be placed in a foster home. However, with the continued lack of government funding and budget cuts at the state and federal levels, the sustainability of the home became difficult in recent years.

However, Mr. Mike St. Martin and the boards of the Louis Children's Crisis Center and the Bayou Area Children's Foundation Inc. used its remaining assets of \$1,079,700 and created an endowment with the Catholic Foundation to keep the mission and vision of the Louis Infant Crisis Center alive and named it after one of its founders, Sister Rosario O'Connell, S.H.Sp. The Sr. Rosario Endowment will create sustainability for the families of St. Lucy Child Development Center in Houma and provide tuition assistance for qualified families to ensure they have access to childcare.

The mission of the Catholic Foundation is to provide sustainability for ministries of the diocese. When Mr. Mike St. Martin and Mrs. Paige Marmande began discussing with me their challenges and closing the doors of Louis Children's Crisis Center, we knew right away that we needed to keep the mission and vision of the Louis Children's Crisis Center alive. It was a perfect connection to St. Lucy's, which has 45+ students, and a large percentage of those families are in the low-income level. Mike and Paige have a huge heart for children and making affordable childcare available, which is why the creation of the Sister Rosario Endowment was so perfect. The generosity of our community continues to grow abundantly, and it is an honor to foster their generosity and transform the lives of these families tomorrow and long into the future.

Amy Ponson
Executive Director





Catholic Women Changing Lives *in a Big Way!*

The more we grow, the more we GIVE! This theme drives the Catholic Women of our Mother Teresa Women's Giving Circle each year as the Catholic Foundation continues to engage women from across the diocese to impact women, children and families locally. **For the past four years, with close to 200 members, the Mother Teresa Women's Giving Circle has collectively granted out more than \$350k making a direct impact on our local community ensuring women, children and families in need have the love, support and resources needed to care for their families.** In 2022 alone, more than \$100,000 was granted to the following ministries by our members.



 **\$34,000** Granted
Catholic Charities Disaster Relief

 **\$20,000** Granted
Crossroads Pregnancy Resource Center

 **\$15,000** Granted
The Haven

 **\$8,000** Granted
Friends of Beyond the Bell

 **\$8,000** Granted
St. Lucy Child Development Center

 **\$8,000** Granted
Hope Extreme

 **\$8,000** Granted
Good Samaritan Food Bank and Thrift Store of Raceland



Supporting Catholic Education

Catholic schools within the Diocese of Houma-Thibodaux are simply the largest faith formation resource, serving close to 5,000 students within our 10 Catholic schools. The Catholic Foundation works with our schools to understand their needs, plan for their future and provide funding to ensure any family who desires a Catholic education has access to the necessary resources to do so.

The Catholic Foundation has been able to support our schools through:

- Securing and providing funding from the National Black Catholic Congress Daniel Rudd Fund for \$10,000 tuition assistance for African American students at our most diverse school, St. Gregory Barbarigo Catholic School
- Partnered with the Catholic Schools Office to secure funding to provide every Catholic school with the Assessment of Religious Knowledge – evaluating the effectiveness of our Catholic education across all schools
- Hosted Legacy Planning events for Central Catholic School where we were able to launch and start long term sustainable endowments for Central Catholic School
- Consult with our schools to guide them in best practices for donor engagement and donor database platforms advancing stewardship for all schools
- Provide grant writing expertise for any school in need
- Sponsor and secure funding for the Catholic education convocation guiding 500+ teacher ministers at the start of the 2022-2023 school year.



Providing Education to Parishioners *on* Creating a Lasting Legacy *for* their family *and* community!

The Catholic Foundation partnered with and hosted five Estate Planning Seminars focusing on helping parishioners understand the importance of having a will! At each of these seminars, we focus on how easy it is to create a plan for your family through a will, how to care for your family even after your passing, and the creative ways to ensure the ministries you love most have the support needed for years to come.

The Catholic Foundation partners with professional advisors from across the diocese from attorneys to tax professionals, to bring their expertise to our parishioners. Our advisors answer and provide real life practical examples for families and individuals to plan for their future. The Foundation, as your trusted partner, provides tools to get you started to ensure the process of creating your family's legacy is easy.

Amy,
I recently had a client bring in a copy of the Estate Planning Toolkit provided by the Catholic Foundation of South Louisiana. What a wonderful guide! Wanted to compliment you and your team for putting this together.

Our family of lawyers is very passionate about helping people set up their estate plans, and this guide is a perfect way to have a client easily get started.

Sincerely,
Gene Gouaux



Caillouet Family Legacy

Honoring Generations *of Family History*

In partnership with a number of strong family legacies across the Bayou Region, the Catholic Foundation has ensured that the Catholic history of families such as the Caillouet Family, Mary and Al Danos Family, John and Clara Brady, and Brian and Emelie Cheramie through Friends of the Rosary continue to live on for generations. It is with pride and great honor that the Catholic Foundation is working with these families and many others to create Donor Advised Funds to manage and support their philanthropic history and goals, ensuring their passions are supported for generations to come.



Thanks to the generosity of donors past and present, Here are the highlights we accomplished together *in 2022*



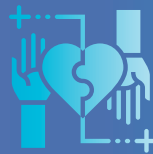
Following five years of substantial growth, assets under management on December 31, 2022, exceeded \$17 million.



The Foundation awarded \$1,026,000 million in grants to deserving religious, education and charitable groups through all of our Foundation's initiatives.



The Foundation continued to sponsor live streamed Masses throughout 2022, as a service to those who could not attend in person, and that sponsorship continues in 2023. The Foundation is recognized at the beginning and end of each Mass.



An agreement was formed in the spring of 2022 with Catholic Charities of the Diocese of Houma-Thibodaux to use the Foundation's core competencies in the service of potential donors creating creative marketing and development planning to ensure the growth of their ministry.



The Catholic Foundation planned and launched the 2022 Annual Bishop's Appeal in partnership with the Diocese of Houma-Thibodaux, reaching a first time ever goal of \$1.1M. One hundred percent of these funds provide for the support of seminarian education, care for our retired priests, parish support through youth and adult formation, as well as essential services for curriculum within our Catholic schools.



Five Estate Planning Seminars were held, providing information and insight, especially related to estate planning and other end of life issues within our church parishes.



Catholic Foundation hosted a State of the Diocese address for key constituents to address core ministries, Hurricane Ida Recovery updates and other focused topics.

Ways to Give Benefits to Our Donors

Socially Responsible Investing

Funds invested with the Catholic Foundation are invested in accordance with the new U.S. Conference of Catholic Bishops' Socially Responsible Investment Guidelines.

Wills & Estate Planning Assistance

Through our partnership with attorneys and tax practitioners, you can easily include your favorite Catholic organizations in your estate plan.

Gifts That Last Forever

The Catholic Foundation staff can help you choose a planned giving vehicle that provides for long-term impact using only your fund's interest while keeping the principal intact.

Tax Advantages

As a 501(c)3 organization, our Catholic Foundation offers you advantageous tax benefits for charitable giving.

Sustain Our Catholic Heritage

Serve generations to come by earmarking funds for your favorite charities or give unrestricted dollars to the causes that mean the most to you.

Memorialize A Beloved Person Or Cause

Honor your loved one, your family heritage, or a particular cause by naming your fund as an everlasting remembrance.

Range Of Accepted Gifts

By donating stock, appreciated securities, or property, you can avoid capital gains and receive a charitable deduction for the full market value of your gift.

Other Funds Explained

Endowment Fund

An endowment is to a parish, school, or nonprofit ministry what retirement funds are to an individual: set-aside resources for the future. They are created to meet unforeseen emergencies, fund innovative programs, ensure continued programs and provide for tomorrow's challenges.

Donor Advised Fund (DAF)

With a DAF, you create a centralized, efficient, and accessible repository to manage charitable giving. Cash, securities or other appreciated assets may be gifted into a designated fund, from which you can recommend grants at any time.

Charitable Gift Annuity (CGA)

A CGA is a contract with the Catholic Foundation that provides you with fixed income payments for life, no matter how long you live. At the end of your life, the remainder of the annuity benefits the specific charity you designate.

Organizational Fund

Parishes, Catholic schools, or other Catholic organizations can establish funds to benefit from a professionally managed pool. Income from interest and dividends can be distributed on an annual basis, and the principal can be distributed on an as-needed basis.

Scholarship Fund

Scholarships assist promising and deserving students with the costs of their education. These funds can be established to honor or memorialize friends, teachers, family members, or other loved ones.

Charitable Trust

A trust is an estate planning tool that allows you to ensure the financial well-being of your family while providing a significant planned gift to your parish, alma mater, or favorite nonprofit ministry.

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

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.

Catholic Charities Funds

- Breaux-Delaune Catholic Charities Endowment
- Byron Talbot Catholic Charities Endowment
- Catholic Charities General Endowment
- Charlotte Bollinger Family Catholic Charities Endowment
- Earline and Roy LeBlanc Catholic Charities Thibodaux Food Bank Endowment
- Giardina Family Foundation Catholic Charities Endowment
- Harold and Gloria Callais Family Catholic Charities Endowment
- Harry and Karen David Catholic Charities Endowment
- Marvin and Loretta Marmande Catholic Charities Endowment
- Mary and Al Danos Foundation Catholic Charities Endowment
- Morris and Sandra Hebert Catholic Charities Endowment
- Patrick Murphy Assisi Bridge House Endowment
- Sr. Rosario - St. Lucy's Child Development Center Endowment
- Sr. Stanislaus Langlinais Endowment for Catholic Community Center
- The Crawford Family - Assisi Bridge House Endowment

Catholic Church Parish Funds

- Francis and Ruby Grabert St. Mary's Nativity Endowment
- Frankie and John J. Jones Jr., M.D. St. Thomas Aquinas Endowment
- Jerry Knight St. Mary's Nativity Endowment
- Maria Immacolata Church Custodial Fund
- Msgr. Donald Ledet St. Mary's Nativity Church Endowment
- Our Lady of Prompt Succor, Chackbay Endowment
- Our Lady of the Isle Custodial Fund
- Our Lady of the Rosary Custodial Fund
- Our Lady of the Rosary Quasi Endowment
- Sacred Heart Parish, Cut Off Custodial Fund
- St. Ann Church Endowment
- St. Bridget Legacy Endowment
- St. Genevieve Catholic Church Endowment
- St. Hilary of Poitiers Youth Formation Endowment
- St. Genevieve Catholic Church Rainy Day Fund
- St. Joseph Co-Cathedral Endowment
- St. Mary's Nativity Church Custodial Fund
- Works of St. Vincent Quasi Endowment

Catholic School Funds

- Brothers of the Sacred Heart Tuition Assistance Endowment
- Central Catholic Endowment
- Danny and Belinda Scholarship Fund
- Durel Family E.D. White Endowment
- Edward Douglas White Educators Fund
- Edward Douglas White Facilities Quasi-Endowment
- Edward Douglas White Guardian Angel Fund
- Joel Robichaux E.D. White Tuition Assistance Quasi-Endowment Fund
- Nicole Davis E.D. White Scholarship Fund
- Edward Douglas White Professional Development Quasi-Endowment
- Juliette Martinez Adams E.D. White Scholarship Endowment Fund
- Msgr. Donald Ledet - St. Mary's Nativity School Endowment
- Nell Talbot Legendre Scholarship Endowment
- Sr. Claire Rodrigue Holy Rosary Endowment
- St. Augustine Tuition Assistance Endowment Fund
- St. Genevieve School General Endowment
- St. Joseph Catholic Elementary School Custodial Fund

Fund Updates *cont.*

Catholic School Funds

- St. Joseph Catholic Elementary School Quasi Endowment
- V Foundation of South Louisiana Endowment
- Vanderbilt Catholic Brother Alfred Kolb Endowment
- Vanderbilt Catholic Brother Ray Kuhn Endowment
- Coach Jack Becker Memorial Vanderbilt Catholic Endowment
- Vanderbilt Catholic Gabrielle Hebert Endowment
- Vanderbilt Catholic General Endowment
- Vanderbilt Catholic John and Helen Rizzo Scholarship Endowment
- Vanderbilt Catholic Megan Hitt Endowment
- Vanderbilt Catholic Student Body Scholarship Endowment
- Vanderbilt Catholic T.J. Cantrelle Endowment

Other Funds

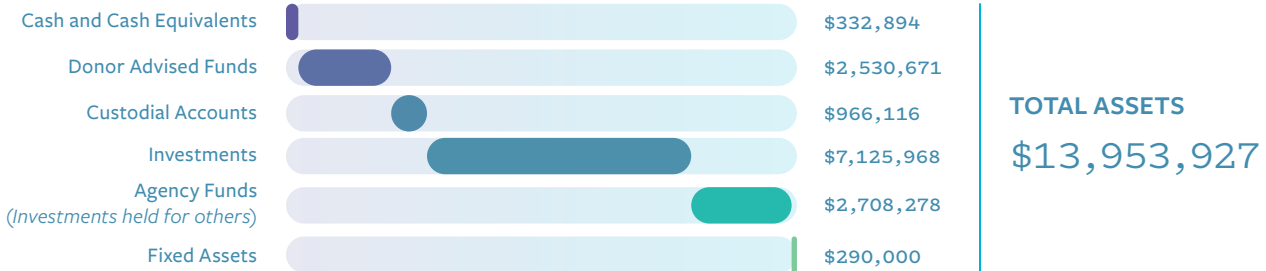
- Catholic Foundation General Endowment
- Fr. Willie Todd Foundation - Quasi Endowment
- Office of Vocations; House of Formation Custodial Fund

Seminarian Education and Priest Retirement Endowments

- Anne-Marie Hebert Ardoin Seminarian Endowment
- Bishop Sam Jacobs Seminarian Education Endowment
- Dean J. Chiasson Seminarian Endowment
- Fr. Brett Lapeyrouse Seminarian Education Endowment
- Fr. Patrick Riviere Seminarian Education Endowment
- Giardina Family Foundation Seminarian Education Endowment
- Grant J. Louviere Seminarian Education Endowment
- Harold and Gloria Callais Family Priest Retirement Endowment
- Harold and Gloria Callais Family Seminarian Education Endowment
- Harry and Karen David Seminarian Endowment
- James J. Buquet, Jr. Family Seminarian Endowment
- Jane & John Dean Seminarian Endowment
- Lena “Bobbie” Sere’ Seminarian Endowment
- Leon ‘Ponoke’ & Marlene Champagne Seminarian Endowment
- Martin F. Edlefsen Seminarian Endowment
- Mary and Al Danos Foundation Seminarian Endowment
- Mary Timothy Everett Seminarian Endowment
- Mr. and Mrs. Joseph J. Cefalu, Sr. Seminarian Endowment
- Msgr. Amedee Seminarian Education Endowment
- Msgr. Donald Ledet Seminarian Education
- Parker Conrad Seminarian Education Endowment
- Peltier Foundation Priest Retirement Endowment
- Rev. Clemens Schneider Seminarian Endowment
- Richard Peltier Seminarian Endowment
- Saint John Vianney Priest Retirement Endowment
- Seminarian Education Endowment
- Society of Joseph, Husband of Mary Seminarian Endowment
- The Peltier Foundation Seminarian Endowment Fund
- St. Joseph Altar Seminarian Endowment

Statement of Financial Position *as of June 30, 2022*

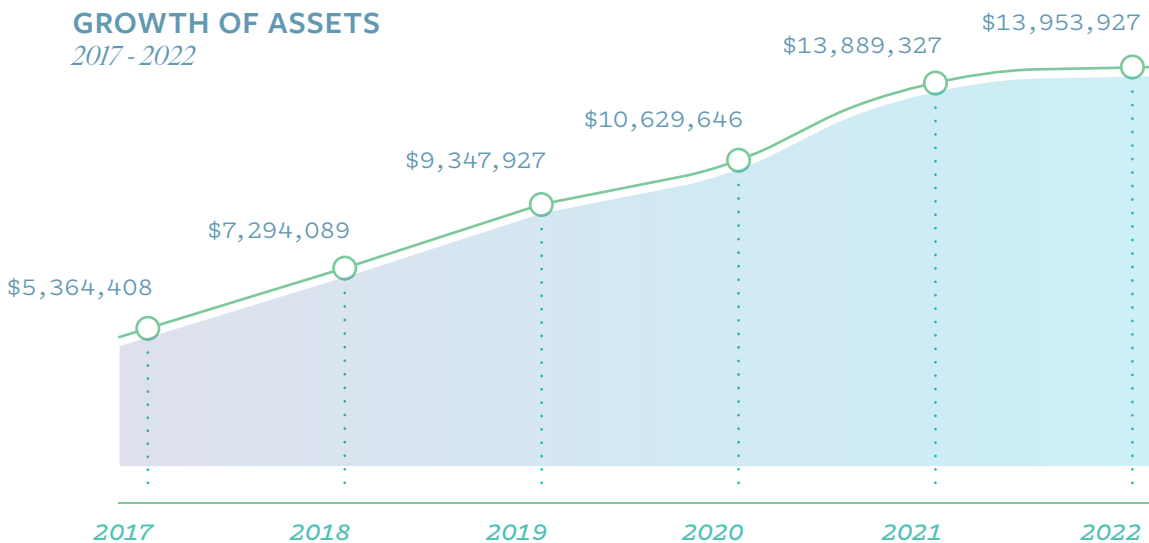
ASSETS



LIABILITIES AND NET ASSETS



GROWTH OF ASSETS *2017 - 2022*



Board of Directors



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Vice Chairman of the Board



Bonnie Brady Babin
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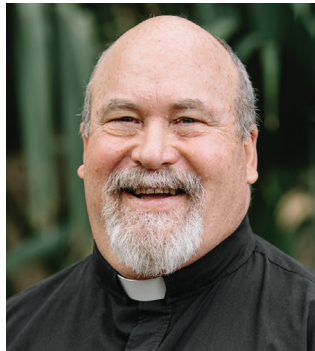
Glenn J. Vice, CPA, CGMA, CF
Treasurer



Jerald Block



Rene Danos David



Fr. Greg Fratt



Fr. Alex Gaudet

Advisory Council

Professional Advisory Council

The Catholic Foundation of South Louisiana recognizes the importance of trust when considering your finances and legacy, whether that is through creating your will, filing taxes or considering a complex gift. Our Foundation has a **trusted group of partners through our Advisory Council** with a variety of different backgrounds to help with any charitable giving needs and provide great guidance and expertise in key aspects of our foundation.

Advisory Council Members

Thomas Meyer, CFP®, APMA®

Private Wealth Advisor and Business
Financial Advisor
Meyer Financial Group

Roy M. Beyer, CPA

Retired

Tim Robichaux

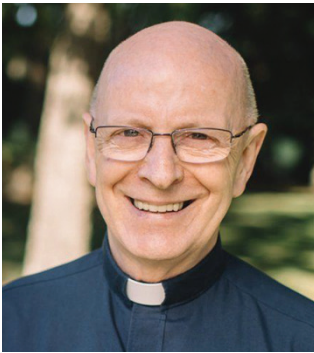
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Jeremy Guedner

President
Vandebilt Catholic High School



Very Rev. Patrick J. Madden



Hilton Michel



Bernadette Pickett



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Chris Saal, M.D.

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Executive Assistant



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Development Associate



Michelle Ohmer
Application Coordinator
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OF SOUTH LOUISIANA

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