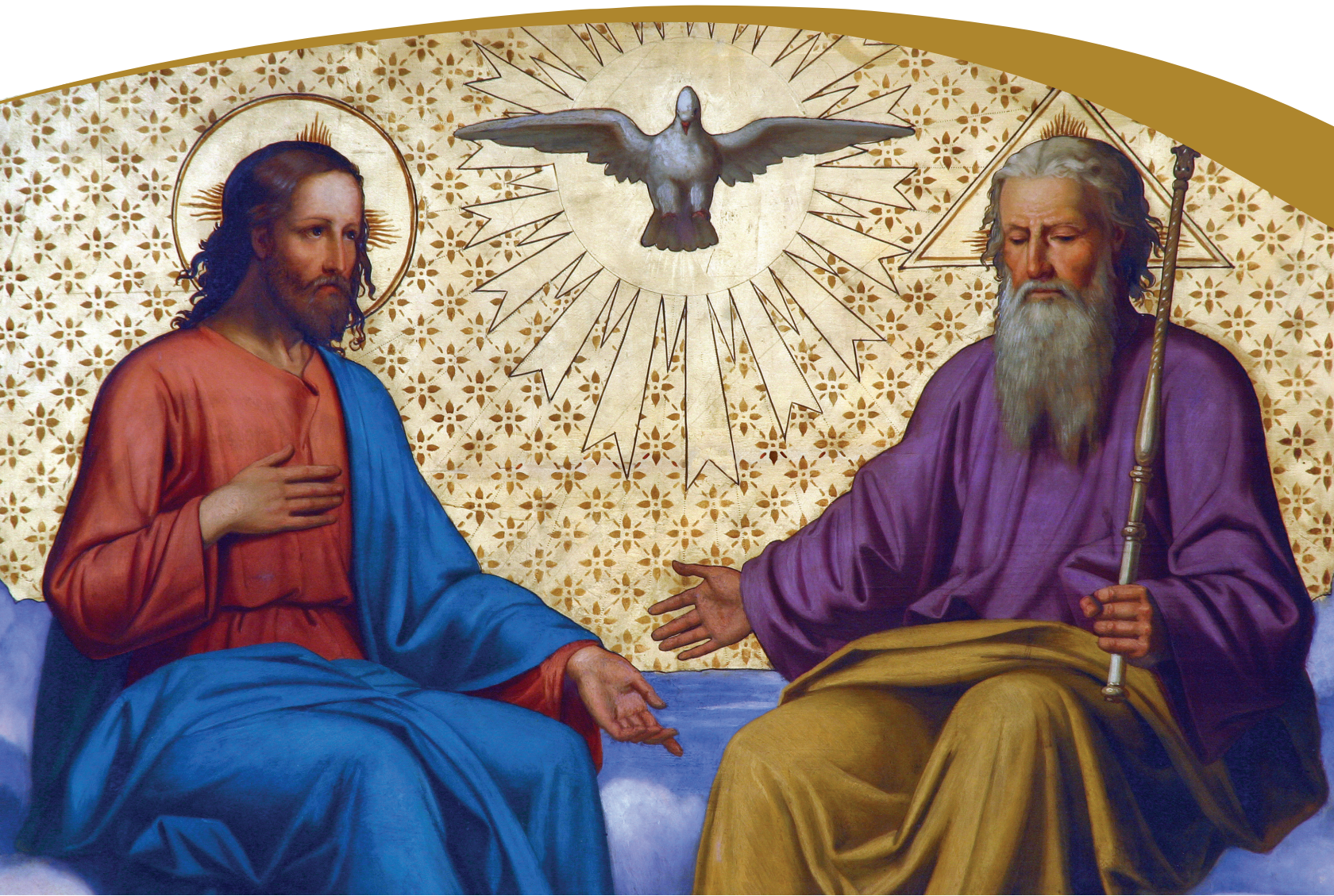


2024 Annual Report



*"Come, you who are blessed by my Father.
Inherit the Kingdom prepared for you from
the foundation of the world."*

MATTHEW 25:34

OUR INVITATION & MISSION

The Catholic Foundation invites you to experience the joy of giving now and beyond your lifetime. We are here to help you consider making gifts that will keep giving...gifts that support the Kingdom of God.

We inspire and facilitate charitable giving for the long-term benefit of our donors and the Church. We are legally distinct from the Archdiocese of Denver and steward the gifts entrusted to us with the goal of building up the Church and its ministries.

BOARD OF TRUSTEES

- Archbishop Samuel J. Aquila
- Theresa Branney
- Deb Cable
- Lisa Clay
- Brian Cleveringa
- Deacon Dan Cook
- Very Rev. R. Michael Dollins, V.G.
- Sergio Gutierrez
Vice Chair
- Marilyn Kennerson
- Judy LaFleur
- Steve LaForest
- Erin Matis
Secretary
- Jennifer Neppel
Treasurer
- Keith Parsons
- Khoi Tran
- Toni Vaeth
- Ann Marie White
Chair

STAFF

- Deacon Steve Stemper
CEO & President
- Dan Baird
Accountant
- Beth Chatterton
Director of Marketing & Stewardship
- Michelle Fehn
Chief Financial Officer
- Christine M. Hoyer
Senior Director of Gift Planning
- Deacon Tim Kenny
Director of Gift Planning
- Lisa Kukura
Executive Director of Gift Planning
- Katie McGinty
Gift Planning Coordinator
- Kevin Staab
Director of Finance
- Jeff Wilson
Operations and Grant Coordinator

INVESTMENT COMMITTEE

- Jennifer Neppel
Chair
- Brian Cleveringa
- Walt Coughlin
(Non-Trustee)
- Josh Langdon
(Non-Trustee)
- Bob Lazzeri
(Non-Trustee)
- Steve Paolucci
(Non-Trustee)
- John Zimmerman
(Non-Trustee)



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givingbeyond@TheCatholicFoundation.com
TheCatholicFoundation.com

Message from the CEO & President and Board of Trustees Chair



We are continually inspired by the generosity of our Catholic community and the unwavering dedication and passion of our staff and Board of Trustees. Here is a summary of the remarkable impact made in 2024 to solidify the future of our Church.

Stewardship and Impact

- We worked with over 750 parishioners throughout the Archdiocese and Deacon Steve along with Deacon Tim Kenny, preached at 15 parishes for a total of 65 Masses.
- The Foundation continued to grow with new Donor-Advised Funds, gifts of real estate (record high in one year), charitable gift annuities (CGA), and we added new Holy Family Legacy Society members.

Charitable Giving

- Over 1,300 grants were issued totaling \$28.7 million, hitting another all-time record high, up over \$9 million from the prior year. We have now surpassed over \$235 million in total grants issued since inception.
- Incoming current gifts exceeded \$30 million, a record high.

Investment Returns

- The investment portfolio grew 11.6% in 2024. That's five of the past six years with double-digit growth (the exception being 2022).

People

- In 2024, our team underwent significant changes. We bid farewell to two of our tenured employees who retired: Denise McCarthy and Mary McAtee.
- Joshua Gideon pursued a new opportunity with The Knights of Columbus.
- Guided by the Holy Spirit, we welcomed several wonderful new members: Christine M. Hoyer, Jeff Wilson, Katie McGinty, and Deacon Tim Kenny, who filled a new position focused on the mountains. Our team is thriving, and we feel incredibly blessed.

We believe that everything we do to inspire and facilitate charitable giving benefits the Church and the givers as we trust in God to fulfill His promises to never be outdone in generosity. Please know of our continued prayers for you and your loved ones.

God bless you.

Deacon Steve

Deacon Steve Stemper

CEO & President

DeaconSteve@TheCatholicFoundation.com

Ann Marie White

Ann Marie White

Board of Trustees Chair

Activities by the Numbers

**Over
\$235
million**
given in grants
since inception

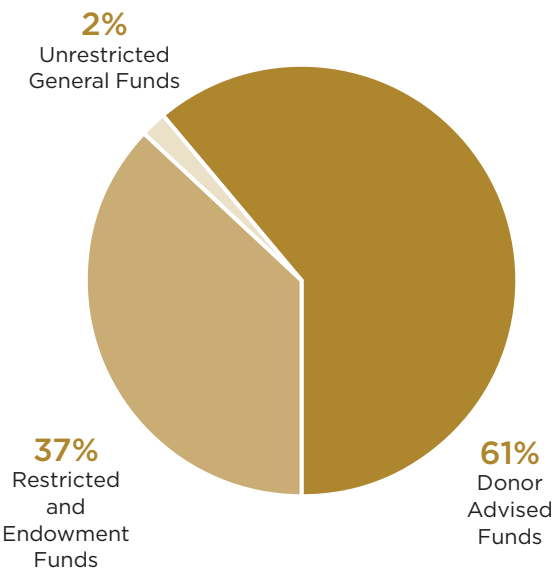
800+
Organizations
supported

Financial Summary

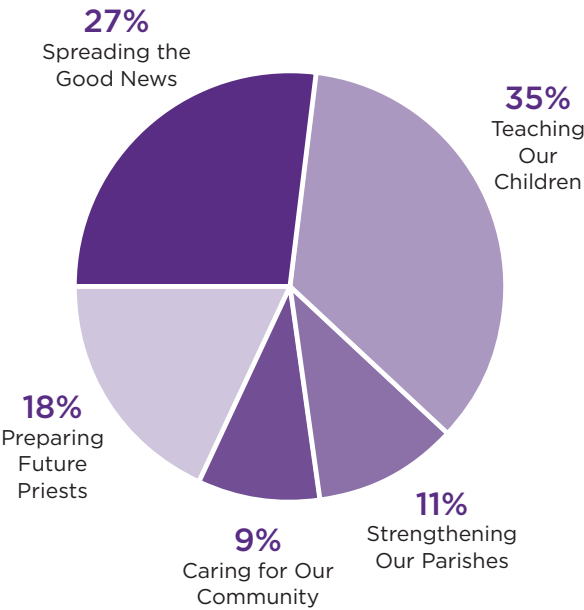
December 31 (Dollars in millions)

	2024	2023	2022
Grants	\$28.7	\$19.5	\$18.7
Number of Grantees	365	331	295
Number of Grants	1,314	1,133	1,140
Investments	\$200.6	\$167.9	\$147.5
Net Assets	\$163.3	\$140.7	\$124.3
Total Assets	\$211.7	\$180.5	\$159.4

Source of Grants



Grants Provided



Giving for the Kingdom of God

Fostering Education

Each year, The Catholic Foundation Board of Trustees allocates \$200,000 from the unrestricted fund to provide Teacher Salary Assistance for 20 Catholic schools within the Archdiocese of Denver. This initiative is specifically aimed at supporting schools that are in the greatest need, ensuring that they can continue to offer quality education despite challenges.

This annual commitment underscores The Foundation's dedication to fostering educational excellence and stability within the Archdiocese, recognizing the vital role that teachers play in shaping the future of their students. Through this support, The Foundation not only aids in retaining talented educators but also contributes to the overall educational environment in these schools.

Our staff hand delivers the checks and meets with the leadership within the school and parish, showing the importance of partnering with our Catholic schools.



Investment Funds

One of the main purposes of The Catholic Foundation is to invest funds morally and responsibly to help support the future of our Church. The Catholic Foundation currently has a variety of funds: including over 200 donor-advised funds, along with endowments and parish funds.



Members of the Holy Family Legacy Society are parishioners who have generously included the Church in their wills or trusts as a beneficiary designation. Each year, we honor these members and our donor-advised fund holders with a special Mass celebrated by the Archbishop, followed by a dinner and fellowship to express our heartfelt gratitude for their unwavering dedication. The Catholic Foundation team also prays for current and deceased members each day during daily prayer. An annual Mass celebrated by the Archbishop is held each year for any intentions from this society.

Holy Family Legacy Society: Over 500 members

GIVING OPTIONS



OPEN A DONOR-ADVISED FUND

Imagine it as a charitable checking account that maximizes tax savings while growing your gift tax-free, enabling you to support future donations to your parish and the apostolates you cherish.



BECOME A HOLY FAMILY LEGACY SOCIETY MEMBER

Leave a legacy to one or more ministries through your will or trust, ensuring your love endures. Your planned gift secures your legacy without impacting your current lifestyle.



OPEN AN ENDOWED FUND

An endowment is a fund invested indefinitely, distributing a portion of its balance annually to a parish, school, or ministry—forever.



GIVE TO AN EXISTING FUND

You can direct a gift to an existing fund for a parish or ministry. You can join others to create greater impact for your parish and other ministries.



BENEFICIARY DESIGNATION

It is very simple to name The Catholic Foundation as a beneficiary (of an IRA as one example) for the benefit of your parish or ministry.

Finding Inspiration in Their Faith and in Each Other

Linda and her new husband Larry's story is a beautiful testament to the power of giving and supporting causes close to one's heart. After the passing of her first husband, Linda thoughtfully included The Catholic Foundation in her will, ensuring that 20% of her estate will support the missions important to her. Her commitment is further reflected in her retirement assets and IRA, which she has carefully planned to benefit her loved ones and the ministries she loves through The Foundation.

Larry, who met Linda at The Foundation's Annual Evening of Appreciation in 2023, shares her passion for philanthropy. May 2024 marked the beginning of a new chapter filled with shared values and mutual support as they were joined in marriage.

Larry has dedicated his two rental homes and other retirement assets to The Catholic Foundation for the benefit of the Church and the ministries he has designated. Together, they are working on gifting Larry's former home to The Catholic Foundation, with the proceeds going into a Donor-Advised Fund. This fund will allow them to witness the impact of their contributions during their lifetime, bringing them immense joy and fulfillment.

As devout Catholics, Linda and Larry find inspiration in their faith and in each other. They read together, sharing insights and perspectives, which deepens their bond and enriches their spiritual journey. Their story is a powerful reminder of the importance of giving and the profound impact it can have on both the giver and the recipient, regardless of where in their lives one might be. Through their generosity, Linda and Larry are leaving a lasting legacy that will benefit the Church and the causes they hold dear.



"God gives us things to share; God doesn't give us things to hold."

**ST. TERESA
OF CALCUTTA**

*"For God so loved the world that
He gave His only son so that...
we might have eternal life."*

JOHN 3:16



The
CATHOLIC
FOUNDATION

TheCatholicFoundation.com