

BUILDING THE FUTURE IN FAITH



AT THE FOUNDATION FOR THE DIOCESE OF HELENA



The Foundation manages six endowment funds that support seminarian education. Four of the six endowments were established by individuals in honor of their family.

WHO WE ARE

Blessings and warm regards from the Foundation for the Diocese of Helena!

We would like to take this opportunity to tell you a little bit about ourselves. We're an independent non-profit foundation committed to the long-term financial support of the Diocese of Helena parishes and ministries. Fully endorsed by Bishop George Leo Thomas and governed by an 18-member board of trustees representing every deanery, your Foundation assists Christ's faithful by offering opportunities to support the Catholic ministries they cherish the most.

WHAT WE DO

Since 1978, your Foundation has been building permanent endowments that provide an ongoing source of income to parishes and the diocese. Today we manage over \$21 million in permanently endowed funds, and in fiscal year 2013 we provided over \$650,000 in grants and endowment distributions to parishes and diocesan ministries.

Imagine giving to a cherished ministry every year for 100 years...200 years...forever? What if only one gift could make that happen? With a gift to an endowment fund, it can.

Endowment gifts are invested, and not spent. The investment earnings are available to support the fund's designated ministry. Rest assured that we invest all endowment gifts in line with the socially responsible investing guidelines of the U.S. Conference of Catholic Bishops.

As a separate charitable organization, we deliver tax advantages to our donors while protecting the gifts forever. These permanent assets are invested for maximum total return and to preserve the corpus value of each endowment. With careful management, the resources entrusted to the Foundation continue to grow. That growth translates to improved financial sustainability for our Catholic ministries.

"...be rich in good works and generous and ready to share with others. In this way you will build a solid foundation for the future, and win the life which is true life."

- 1 Timothy 6:18-19

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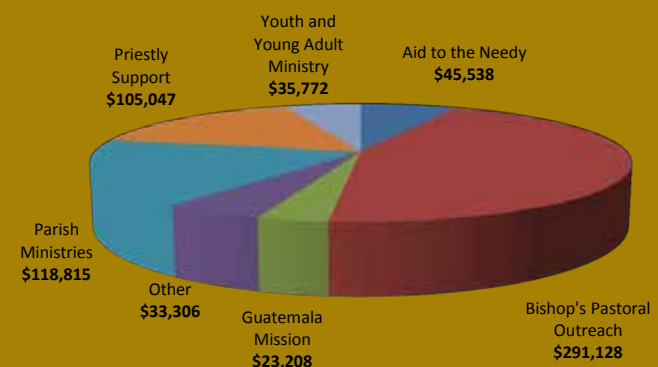


A wonderful thank you from a parish in response to a grant from the Foundation.



This year the Diocese of Helena's Guatemala Mission marks its 50th anniversary! Help support the mission by contributing to its endowment fund at the Foundation.

Foundation Grants and Endowment Distributions ~ 2013





**St. Mary,
Queen of Heaven Mission.**

In 2003 St. Mary Queen of Heaven in Superior received word that a bequest had been left to the mission parish. Through her estate plan, a parishioner directed her home be left to her parish, with instructions that an endowment be established with the sale proceeds. The endowment was established in 2004 and the parish reserves the earnings to pay for nonrecurring projects. In 2009 the endowment earnings funded a new roof for the mission parish. This year, combined with local support and a Catholic Extension grant, the parish used their endowment earnings to install a new mobility lift.

"Through the stewardship of endowment funds, the Foundation for the Diocese of Helena has allowed St. Mary Queen of Heaven Mission to accomplish necessary projects that would otherwise be impossible."

- Fr. Jeff Fleming, Pastor,

St. Mary Queen of Heaven Mission

"The whole body, held together by every joint with which it is equipped, grows and builds itself up in love as each part does its work."

- Ephesians 4:16

**We move into the future
confidently and unafraid.
For we walk in the presence
of the Risen Lord... the
One who is ever in our midst
"as one who serves."**

*- Bishop George Leo Thomas,
Chrism Mass Homily, April 10, 2014*



Bishop Thomas blesses and pours the oils at Chrism Mass.

HOW WE HELP

We can help you make a difference in a variety of ways, now and into the future:

- Support the Catholic ministries most near and dear to your heart by contributing to one of the many established endowment funds at the Foundation. Every parish and every diocesan ministry has an endowment fund with the Foundation.
- You can honor your family or memorialize a loved one by establishing a family or named endowment fund that supports any number of Catholic ministries you designate. The endowment principal remains intact within the Foundation, in lasting memory to the love and caring support of those whose sacrifice contributed to the fund. We will send you an annual endowment statement so you can see the fund activity and impact each year.
- When you direct your endowment gift through a Charitable Gift Annuity, you qualify for the valuable Montana Endowment Tax Credit on your Montana income tax return. Ask us for a simple no-obligation annuity proposal – you'll be surprised at the tax benefits! Plus, it can provide you with income for the rest of your life.
- We can help you establish a planned gift in your will or estate plan that will benefit your parish or cherished Catholic ministry. Just contact the Foundation for more information. Or, attend one of our estate planning and planned giving educational sessions held around the diocese in September 2014!

YOUR FOUNDATION STAFF AND BOARD

For over 35 years, the Foundation for the Diocese of Helena has responded to the call of donors dedicated to making a difference in our diocese. No matter where you are on life's path, no matter the amount you have to give, we can offer you a doorway to giving and to making a positive difference in alignment with your interests and your beliefs. We look forward to working with you.

Jeanne Saarinen, Executive Director
jeanne@fdoh.org

Mary Ann Gorsich, Finance Director
maryann@fdoh.org

PO Box 1729
Helena, MT 59624
(406) 442-5820 (Helena area)
(800) 584-8914
www.fdo.org

FOUNDATION BOARD OF TRUSTEES

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Reverend Monsignor Kevin O'Neill, Vicar General

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Contributing to an endowment does not replace your parish or diocesan gifts. Endowments are long-term investments providing a sustainable funding stream for parishes and ministries. Gifts to your parish offertory and Annual Catholic Appeal are essential to maintain the day-to-day ministries and operations of your local parish and your diocese.

HAVING AN ESTATE PLAN IS GOOD STEWARDSHIP

Do you have an estate plan? Is your will in need of updating? The Foundation, in partnership with your parish and the Diocese of Helena, is offering educational sessions around the diocese this fall. You'll receive some great tools, including a "Personal Planning Guide – A Guide for Preparing Your Will and Estate Plan," to help you organize your affairs and to remember those you care about the most. You'll also hear about timely ways to support your parish or other Catholic ministry in your estate plan and receive substantial tax savings now.

This is education, not a fundraising event, so leave your checkbook at home! Legal and tax professionals will be on hand to answer your questions. Persons of all ages with estates of all sizes will benefit. Here's what others had to say after attending this education:

"Extremely informational and good motivation to get something going."

- St. Mary of the Assumption parishioner, Laurin

"Well presented—no pressure for church endowments. Good information provided in folder for reference."

- Cathedral of St. Helena parishioner

Plan to attend one of the upcoming 2014 educational sessions:

- Helena: Tuesday, Sept. 16
- Missoula: Wednesday, Sept. 17
- Big Fork: Thursday, Sept. 18
- Butte: Tuesday, Sept. 23
- Bozeman: Thursday, Sept. 25

Watch your parish bulletin for details on times and locations, or contact the Foundation. This is a service provided free of charge by the Foundation for the Diocese of Helena and your parish.

