

From the rising of the sun
to its setting
let the name of the LORD
be *praised*

Psalm 113:3



FOUNDATION
for the Diocese of Helena

Annual Report

Fiscal Year 2025



Thank You

Words fall short when it comes to expressing our gratitude to

***Jim McDonald** for his extraordinary decade of service on the Foundation Board. Jim brought unwavering focus, dedication, and integrity to everything he did. But perhaps most memorable was the genuine faith he carried with him — a quiet, beautiful witness that enriched every conversation and decision we shared. Jim, we are deeply grateful for the gifts God entrusted to you and for the generous way you offered them to this Board. Thank you!*



President's Letter

Rejoice in the Lord always. I shall say it again: rejoice!
(Philippians 4:4)

And rejoice we do! Because of your extraordinary generosity through the Because He First Loved Us campaign, our Diocese is alive with good news and I am delighted to share some of those highlights with you (see page 6).

Serving as president of the Foundation's Board of Trustees is a true privilege. I have the joy of witnessing the fruits of your giving firsthand. As a separate entity from the Diocese itself, the Foundation pursues a focused mission: **to serve and strengthen the people, parishes, ministries, and apostolic mission of the Diocese of Helena.** We do this by building endowments for every parish and ministry, making quarterly distributions, funding a vibrant grants program for evangelization across Western Montana, and growing our Legacy Society for those who wish to extend their love of the faith for generations to come (see page 3).

None of this would be possible without you. Your faith, your generosity, and your deep love for the Church is profoundly impacting our corner of the world.

It is a true blessing to serve our Lord in this way. Let us rejoice in His goodness!

In Christ,

Erica Matelich | *President 2025-2027*

What if the gift you leave behind sustains our Church forever?

A SIMPLE ESTATE GIFT CAN TRANSFORM A DIOCESE FOR GENERATIONS TO COME

WHAT IF IT WERE POSSIBLE TO ...

- Love our neighbors in ways that strengthen our entire community?
- Have the blessings of our lifetime continue growing the faith of future generations?
- Become an example of sacrificial love that sets hearts aflame for the Lord?
- See every parish's operating expenses fully covered — year after year, without end?

This is not an impossible dream. It is within reach — and it begins with understanding how endowments work.

When you leave a gift to an endowment at the Foundation for the Diocese, the principal is **never spent**. It grows. And through that growth, funds from earnings are distributed quarterly to your parish or ministry. Your estate gift doesn't just make a one-time impact — it keeps giving, *forever*.

THE NUMBERS ARE TRANSFORMATIVE

We ran the numbers — and the potential is staggering. Our diocese is home to 16,369 families. If every family's estate reflected Montana's median value of \$273,000, and each committed just 5% of that estate to an endowment, the resulting corpus would exceed **\$220M**. That would generate more than **\$10M in annual distributions** — enough to sustain every parish and ministry in Western Montana, in perpetuity.

“An estate gift is not a line item in a budget — it is a seed planted in sacred ground. It is the gift that keeps on giving, earning returns that fund the sacramental and charitable life of the Church without end.”

YOUR LEGACY BEGINS WITH A DECISION

Consider what your estate gift could mean: a community strengthened, a faith carried forward, a heart enlarged by the grace of sacrificial giving, and parishes and ministries sustained long after you are gone. The gift you leave behind has the power to transform our diocese.



If you have already named the Foundation in your estate plan, we invite you to complete the gift notification form on our website or scan the QR code provided. Your generosity deserves to be celebrated and honored.

If you haven't created an estate gift yet, or if you don't have a will, please use the Foundation's online will writing service at FreeWill.com/fdoh. It's a pleasure to offer this service to our parishioners at no cost.

LEARN MORE

Contact **Dan Thies** to explore how you can leave an estate gift to your favorite parish or ministry in our Diocese.

Over the past three years, the Foundation has gone from possessing five active and unrealized estates to having over 85 anticipated estate gifts on file.

PLEASE PRAY FOR

SEMINARIANS

FOR THE DIOCESE OF HELENA



(Dcn.) Kaleb Mitchell
Theology IV
Pontifical North American College



Riley Helgoe
Theology III
St. John Vianney Seminary



Anthony Olmes
Theology II
St. Paul Seminary



James Semling
Theology II
St. Paul Seminary



Jamie Severson
Theology II
Pontifical North American College



Carter Anderson
Theology I
Pontifical North American College



Shae Bills
Theology I
Pontifical North American College



Matt Keck
Theology I
St. Paul Seminary



Carson Gorton
Philosophy I
St. John Vianney Seminary



Jake Smith
Philosophy I
St. John Vianney Seminary



Liam Aippersbach
Propaedeutic Year
St. Paul Seminary



Ryan Frampton
Propaedeutic Year
St. Paul Seminary



Mason Yochum
Propaedeutic Year
St. Paul Seminary

TO SEND ENCOURAGEMENT OR ASK FOR PRAYERS, PLEASE WRITE OUR MEN AT THEIR RESPECTIVE SEMINARY OR LOCATION:

St. John Vianney Theological Seminary
1300 South Steele St.
Denver, CO 80210

The St. Paul Seminary School of Divinity
2260 Summit Ave.
St. Paul, MN 55105

Pontifical North American College
00120 Vatican City State
Europe

Capital Campaign Update— Proclaiming Good News



What a joy and a privilege it is to share this update with you — the incredible, faithful people of the Diocese of Helena.

We say it often, but we mean it deeply: great things are happening in our Diocese. The *Because He First Loved Us* campaign was never just about dollars and goals — it was about faith made visible, and the examples that follow are proof of that. Your generosity is at the heart of every single one of these stories.

Thank you. Thank you for your sacrificial giving, your prayers, and your trust. You have made these works of mercy and mission possible, and the Diocese of Helena is richer — in every sense — because of you.

If you have questions about any of these campaign elements or would simply like to talk, please don't hesitate to reach out. It would be my honor to connect with you. May God bless you and your families in a very special way!

Daniel Thies | *Executive Director*
(406) 389-7051 | dthies@dohmt.org



CARE FOR OUR RETIRED PRIESTS

One of the campaign's most sacred goals was the full funding of the Priestly Retirement Trust — and thanks be to God, that goal has been achieved. Because of your generosity, we are now able to provide comprehensive care for our senior priests, not only financially, but personally. We are overjoyed to introduce Maggie Phelan, who serves as the Diocese's Clergy Wellness Coordinator. In this vital role, Maggie regularly visits with our priests, offers attentive follow-up after medical procedures, and serves as a trusted liaison between them and the Diocesan staff. She is, quite simply, a blessing — and a blessing made possible entirely through your faithful giving.

GROW PRIESTLY VOCATIONS

“We need more priests!” — it is a cry of the faithful that so many of us know well. And thanks be to God, your prayers and generous gifts are bearing fruit. The Diocese of Helena is witnessing a beautiful surge in vocations, with 13 young men currently answering God’s call in seminary. The joy doesn’t stop there: June 2026 will bring the priestly ordination of Dcn. Kaleb Mitchell, and this November, seminarian Riley Helgoe will be ordained a deacon — what a magnificent blessing! Looking ahead, we are hopeful that two more men will enter the seminary this coming fall. Each of these milestones is a testament to the power of your faithfulness. The Church is renewed through sacrificial giving, and these future priests are, in no small part, a gift made possible through yours.



RESTORE OUR DIOCESAN CATHEDRAL

Our Mother Church, the magnificent Cathedral of St. Helena, is being lovingly restored and renewed — and it is your generosity that is making it possible. Thanks be to God, the Cathedral’s iconic spires have been fully rebuilt, and their strength was put to the test this past December when they stood firm against hurricane-force winds. What a powerful testament to the care and craftsmanship your gifts have made possible! And there is more to celebrate: this summer, construction will begin on beautiful new front steps, replacing the worn and crumbling granite with a worthy entrance to our stunning Diocesan cathedral. These steps will be more than stone — they will be a gathering place, a threshold where the faithful come together as they enter and exit the house of God. None of this would be possible without your faithful and generous support. Thank you for caring for this sacred treasure for generations to come.

STRENGTHEN OUR PARISHES

One of the most beautiful fruits of the Because He First Loved Us campaign has been the flowering of evangelization at the parish level — and the story of St. Richard Parish in Columbia Falls is a shining example. Using a portion of their campaign gifts alongside a Dream Big Grant from the Foundation, St. Richard's brought to life the Little Souls Miscarriage Ministry. This tender, Spirit-led ministry walks alongside families — Catholic and non-Catholic alike — who have suffered the heartbreak of miscarriage, stillbirth, or infant loss. In their most vulnerable moments, these families are met not with words alone, but with presence, prayer, and genuine accompaniment in faith.

This is the Gospel made tangible. This is evangelization at its most profound.

Thanks be to God for the compassionate hearts at St. Richard Parish who answered this call, and thanks to you, whose generous gifts helped make it possible. To learn more about this healing ministry, we invite you to watch a beautiful six-part video series produced by the Foundation, available on our YouTube channel. And we encourage you — talk to your own parish! Across our Diocese, your gifts are inspiring remarkable works of mercy and mission that are drawing people ever closer to our Savior.



EVANGELIZATION

Evangelize: to preach the Gospel; to proclaim the good news to all.

Thanks be to God, the fruits of your generosity are being written in the lives of real people. This Easter season, the Diocese of Helena welcomed an estimated 600 OCIA candidates into the fullness of the faith — nearly triple the number from just three years ago in 2023. Let that sink in. Three times as many souls drawn to the light of Christ, three times as many families changed forever, three times as many voices added to the chorus of the faithful in our Diocese.

This is what your sacrificial giving makes possible. This is the Because He First Loved Us campaign at work in the world. May we never cease to be astonished by what God can do when His people respond with open and generous hearts.



(as of 4/30/2026)

\$40,792,565 Pledged

Campaign PLEDGED

\$25,576,831

Campaign RECEIVED

\$11,326,694

DISTRIBUTED to Parishes

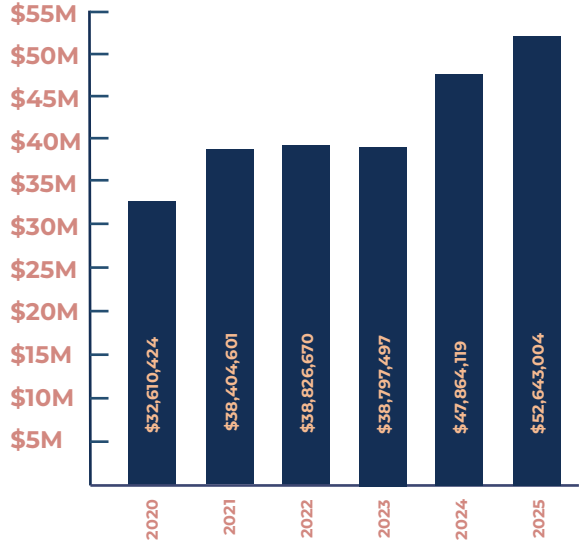


By the Numbers

FISCAL YEAR 2025



Net Assets 2020-2025



As our endowments grow, so do the quarterly distributions that benefit our parishes, missions and ministries!



173

Number of
Endowments



245

Number of Charitable
Gift Annuities Managed



\$15,680,979

Total Amount Distributed in
2025 from FDOH Endowments,
Campaign Distributions and Grants

- Parish Ministries
- Youth & Young Adult Ministry
- Aid to the Needy
- Bishop's Pastoral Outreach
- FDOH Grants
- Priestly Support
- Guatemala Mission
- Other Diocesan Ministries
- Other Non-Diocesan Ministries
- Campaign Distributions

Revenue & Expenses

FISCAL YEAR 2025



\$22,010,924

Total Revenue



\$17,232,038

**Total Expenses
(Including Campaign, Endowment
and Grant Distributions)**



\$47,864,119

Net Assets - Beginning of the Year



\$52,643,004

Net Assets - End of the Year

BOARD OF TRUSTEES

President

Erica Matelich
St. Matthew, Kalispell

Vice President

Carl Rummel
Christ the King, Missoula

Secretary

Fr. Joe Fleming
*Immaculate Conception,
Deer Lodge*

Treasurer

John Talia
St. Francis of Assisi, Hamilton

Past President

Rona Davison
Holy Rosary, Bozeman

Ex-Officio

Bishop Austin A. Vetter
Diocese of Helena

Msg. Kevin O'Neill
Vicar General

Trustees

Rick Booth
St. Francis Xavier, Missoula

Shannon Curry
St. Francis, Valier

Lorraine DeBruycker
St. Joseph, Choteau

Tim Fox
Cathedral of St. Helena

Fr. Tom Haffey
Senior Status, Butte

Dcn. Charlie Harball
St. Matthew, Kalispell

Laura Humberger
Holy Rosary, Bozeman

Dwight O'Hara
Immaculate Conception, Deer Lodge

Brian Tanko
St. Matthew, Kalispell

Jennifer Schmitt
Cathedral of St. Helena

FDOH STAFF

Dan Thies
Executive Director

Karen Ford
Accountant

Margaret Herriges
Engagement & Marketing

A Smarter Way to Give

CHARITABLE GIFT ANNUITIES AND MONTANA'S 40% TAX CREDIT

Looking for a powerful way to support Catholic ministries in western Montana — while earning one of the best tax benefits available to Montana donors? A **Charitable Gift Annuity (CGA)** through the Foundation for the Diocese of Helena may be exactly what you're looking for.

GIVE GENEROUSLY. GET A REMARKABLE TAX CREDIT.

When you establish a Charitable Gift Annuity with the Foundation, the Montana Endowment Tax Credit rewards your generosity with a tax credit equal to 40% of your gift — up to \$15,000 per year (\$30,000 for married couples filing jointly).

This is not a deduction. A tax credit reduces the actual taxes you owe, dollar for dollar. On a \$25,000 gift, that could mean \$10,000 directly off your Montana tax bill. It's one of the most generous charitable tax incentives in the country, and it's available right here in Montana.

HOW IT WORKS

You make a gift of cash or appreciated assets (stock) to the Foundation — as little as \$2,500 — and in return, the Foundation pays you a fixed annual income starting at an agreed upon date. Payments are guaranteed — steady and predictable, no matter what the markets do.

After a required five-year period, our donors are asked if they want to terminate their annuity and donate the remaining funds to the parish or ministry endowment they named as beneficiary of the CGA. It is a beautiful way to make a meaningful gift to your favorite parish or ministry and receive a tax credit — and that gift continues building our faith for generations.

WHAT IS AN ENDOWMENT?

An endowment is a permanent fund. The principal is preserved and invested forever, while the earnings support Catholic parishes, schools, and charitable works across the Diocese of Helena — year after year, in perpetuity. Your gift keeps working long after your lifetime.

READY TO LEARN MORE?

A Charitable Gift Annuity lets you do it all: reduce your tax burden significantly, receive income during your lifetime, and ultimately leave a lasting legacy for the Church in Montana.

Contact the Foundation for the Diocese of Helena today to request a personalized gift illustration and learn how much your Montana tax credit could be.

406-389-7050 or
foundation@dohmt.org



Bishop's Letter

My dear friends in Christ,



Through your generous and sacrificial giving to the *Because He First Loved Us Campaign*, our Diocese has accomplished much — and, by God's grace, will continue to do so. Let us therefore keep praise and gratitude ever on our lips, giving thanks to our Lord Jesus Christ for the many blessings He so generously bestows upon us. I invite you now to pray together the words of St. Anselm, a prayer that has accompanied us throughout this campaign:

THE PRAYER OF ST. ANSELM

*O Lord, my God, teach my heart this day
where and how to seek You, where and how to find You.*

*You have made me and remade me,
and You have bestowed on me
all the good things I possess, and still I do not know You.
I have not yet done that for which I was made.*

*Teach me to seek You,
for I cannot seek You unless You teach me,
or find You unless You show Yourself to me.*

*Let me seek You in my desire;
let me desire You in my seeking.
Let me find You by loving You;
Let me Love You when I find you.*

Amen

Thank you for your generous hearts. Know of my prayers for you and please pray for me!

In Christ, I am

+ Austin A. Vetter

Bishop Austin A. Vetter
Bishop of the Helena



The Foundation's gift to the people of our Diocese

Create a will today to care for your loved ones and steward the resources God has entrusted to you. Wills are expensive. This one is free!



FOUNDATION
for the Diocese of Helena

→ **Get started at FreeWill.com/fdoh**

FREEWILL

PO Box 1729
Helena, MT 59624-1729

Nonprofit Org
US Postage
PAID
Helena, MT 59601
Permit No. 221