My dear friends in Christ,

Welcome to the 2015-2016 annual report of The Catholic Foundation of West Michigan. Serving as the leadership of The Foundation, we are pleased and proud to bring you this positive accountability report of our Catholic community foundation.

This past year, The Foundation celebrated its 20th year of existence in a variety of ways. The most significant was the fall (2015) gala at Meijer Gardens & Sculpture Park sponsored in large part by our own Bishop’s Angels. We welcomed lay and clergy guests from all over the diocese and the evening was marked by recognizing and honoring Bishop Rose and the vision he and other founding members of the board had in establishing The Foundation.

This past year, The Foundation’s investment performance was impacted, like many investments, with modest returns. The investment world continues to talk about the volatility in the market as our governmental leaders, and those around the world, fight with low growth, low interest rates and political uncertainty. These modest returns highlight the importance of our distribution policy that continues to offer fund members, especially in years like this, a consistent, reliable source of funding for the various ministries around our diocese.

As we conclude our 20th year of operation, we continue to be grateful to all of you, and those that have gone before us, in making The Foundation a lasting source of funding for our parishes, schools, vocations, faith formation and social service ministries.

May God continue to bless you and your family as we look forward in faith to a bright future.

Sincerely yours in Christ,

+ David J. Walkowiak
Most Reverend David J. Walkowiak
Bishop of Grand Rapids

Roy Lorenz
Advisory Board Chair
St. Bartholomew Parish Endowment Fund, Newaygo

Sitting on a hilltop overlooking a quiet valley on the outskirts of the City of Newaygo, St. Bartholomew has served the local Catholic community for 115 years. In 2007, parish leadership had the opportunity to sell a portion of the property adjacent to the church. Father Thomas Boufford and parish leadership held thoughtful discussion to determine how best to be good stewards of the proceeds of the sale.

It was decided that a named fund, The St. Bartholomew Parish Endowment Fund, would be established within The Foundation to provide a permanent source of funding to preserve and maintain the historic church.

Parishioners who wish to support the parish can contribute to the growth of the fund through an appeal every July. Last year, the fund provided nearly $20,000 in available distributions, a significant gift to their beloved and historic church on the hill.
Jim & Josie Dirkes Parish Improvement Fund

Energetic, compassionate and loving are words friends and family use to describe the late Jim (deceased 2006) and Josie Dirkes (deceased 2010). Jim and Josie raised their four children at St. Anthony of Padua Parish before retiring to Naples, Florida.

A couple devoted to their Catholic faith and active in the St. Anthony of Padua Parish community, Jim and Josie were also owners of an industrial heating and cooling manufacturing company. With a unique, in-depth understanding of the financial reality and importance of maintaining the mechanical infrastructure of a building and a commitment to their Catholic faith, Jim and Josie established the The Dirkes Parish Improvement Fund. The fund provides annual financial resources that help offset the cost of parish maintenance and improvement expenses.
Established in 1999, the Bishop’s Angels Annual Giving Program provides a unique opportunity to advance the efforts of The Catholic Foundation of West Michigan. It is with sincere gratitude that we acknowledge the following Bishop’s Angels:

Mr. and Mrs. Steven Trudell
Mr. and Mrs. James Wojczynski
Mr. and Mrs. Wally Fu
Mr. and Mrs. Charles Bennett
Mr. and Mrs. Mark Bissell
Mrs. Patricia Bloom
Mr. Arthur Bott
Mr. and Mrs. Scott Brew
Mr. and Mrs. George Chmelar
Mr. and Mrs. Robert Creswell
Mr. and Mrs. Ralph Crew*
Mr. and Mrs. John Doyle
Dr. and Mrs. J. Stephen Ebrom
Mr. and Mrs. Robert Herr
Mr. and Mrs. Donald Jandernoa
Mr. and Mrs. Michael Jandernoa
Mr. and Mrs. Scott Keane
Mrs. Mary Ann Keeler*
Dr. and Mrs. Paul Korte
Mrs. Mary Ellen Koziol *
Mr. and Mrs. Mike Kramer
Mr. and Mrs. Bruce Langlois
Mr. and Mrs. Louis Moran II
Mr. and Mrs. Kenneth Muraski

Mr. and Mrs. Michael Muraski
Mrs. Mary O’Connor
Mr. and Mrs. Mark Olesnavage
Rev. Michael Olson
Mr. and Mrs. Thomas Pfennig
Mr. and Mrs. James Rabaut
Mrs. Joan Secchia
Mrs. Judith Shunta
Mr. and Mrs. Paul Snow*
Mr. and Mrs. David Snyder
Mr. and Mrs. John Teeples
Mr. and Mrs. Russell Visner
Ms. Karen Weber
Mr. and Mrs. Richard Wendt
Mr. and Mrs. Donald Karpinski*
Mr. Floyd Kuehnlt+
Mrs. Rosalie Polaschik
Mr. and Mrs. John Hendrickson
Mr. and Mrs. Martin Allen, Jr.
Mr. and Mrs. Wayne Gagnon+
Mr. and Mrs. John Kennedy+
Dr. and Mrs. Richard Panek
Mr. and Mrs. Robert Vujea+

Angel – annual donation of $1,000    † Lifetime Angel – One-time donation of $20,000
*Charter Angels – members of the Bishop’s Angels program since its inception in 1999
### Member Funds

The Catholic Foundation of West Michigan has 145 member funds. For the fiscal year ending June 30, 2016, The Foundation will make distributions of $1,872,380 available to participants.

### Diocesan Funds

#### Educational Funds
- Bishop's Fund for Catholic Education: School Scholarship Fund
- Bishop Hurley Scholarship Fund

#### Faith Formation
- Bishop's Fund for Catholic Education: Faith Formation
- Bishop Kevin M. Britt Adult Faith Formation Fund
- Fund for the Faith
- Paul and Lisa Snow Fund for Catholic Truth and Apologetics
- Media Evangelization Fund

#### Social Service
- Sister Rose Callahan Fund for the Aged and Disabled
- Jubilee Justice Fund
- Catholic Charities West Michigan
- John and Betty Neary Family Fund
- Monsignor Terrence L. Stewart Fund for the Poor

#### Vocations
- Fedewa Fund for Formation of Seminarians
- Cebelak Vocations Promotion Fund
- Byars Family Fund for Seminarian Education
- Emil Shebesta - Muskegon K of C Fund

#### Greatest Need Funds
- Carl J. Schubert Fund
- Natalie E. Rydzewski Fund
- Donald M. Hesling Fund
- Lehman/Panek Family Fund
- Mary P. and John M. Wolf Fund

#### Parish/Organization Funds
- Basilica of St. Adalbert: Basilica Fund
- Cathedral of St. Andrew: Holy Name of Jesus
- Parish Evangelization Fund
- Unrestricted Fund
- Immaculate Heart of Mary
- Jim and Josie Dirkes Parish Improvement Fund
- Julia Ross Fund: Sacred Heart (Evart)
- Pere Marquette Cemetery (Ludington)
- St. Ann's Home #2 (Grand Rapids)
- St. Anthony of Padua Parish Fund
- St. Bartholomew Parish Fund
- Buescher Fund: St. Charles
- Mildred Wells Fund: St. Mary - St. Paul (Big Rapids)
- Monsignor John Najdowski Fund for the Poor-St. Pius X
- St. Isidore Seminarian Fund
- St. John Paul II Parish Cemetery Fund

### Educational Funds
- Foundation for Catholic Secondary Education of Greater Grand Rapids: General Endowment Fund
- St. Robert Ann Eno Educational Fund
- Eugenia Czarnecki Family Fund
- Richard Boguslaski Science/Engineering Equipment Fund
- Monsignor Charles Brophy Scholarship Fund
- Lena Allgeier Technology Fund
- Eugene "Sam" Kunst Endowed Memorial Scholarship Fund
- Rev. James Kowalski Scholarship Fund - CCHS
- William J. Lawrence III Family Scholarship Fund
- Mary Lynn Knapfichtschich Scholarship Fund
- Ed and June Priez Family CCHS Scholarship Fund
- Joe Laura Scholarship Fund
- Deacon Dale Holtern Scholarship Fund
- Dennis Campbell Memorial Scholarship Fund
- Jim and Linda Payne Tuition Assistance Fund
- Frank and Mary Hermes Memorial Scholarship Fund
- Czerny Szoka Scholarship Fund
- WCHS Band Boosters Scholarship Fund
- Ed Wagner Tuition Assistance Fund
- Joanne Harwood Angel Scholarship Fund
- Lawrence/Patricia Romanza Transfer Scholarship Fund
- Grace (Ben) Slett Endowed Scholarship Fund
- Reed Family Music Scholarship Fund
- Reynolds-Elderkin Family Scholarship Fund
- Conquering Obstacles/Denny Flak Scholarship Fund
- David M. Seamon Leadership Award Fund
- AMDS Architects Scholarship Fund
- Florence and John Jacibms Memorial Scholarship Fund
- VanGessel Family Scholarship Fund
- Nicholas Mihos Memorial Scholarship Fund
- John and Sandy Lowery Family Scholarship Fund
- Philip and Sharon Burns Heart and Soul Award Fund
- Frank J. Geary Scholarship Fund
- Ziemke Family Scholarship Fund
- Robert and Larita Stephanak Scholarship
- Patrick and Jacqueline Murphy Endowed Scholarship
- Ziemke Family Scholarship Fund
- Frank and Mary Burns Scholarship Fund
- Our Lady of Consolation Foundation Fund
- Corpus Christi School Jacqueline Cyr Miller Fund
- Holy Name of Jesus
- Holy Trinity
- Our Lady of Consolation Sacred Heart Fund
- Sacred Heart (Grand Rapids)
- Sacred Heart (Muskegon Heights)
- Korson Family Scholarship Fund
- Sacred Heart (Ludington)
- San Juan Diego Academy
- Tuition Assistance Fund
- AMDS Scholarship Assistance Fund
- San Juan Diego Fund
- SS Peter & Paul (Ionia)
- Armando Duvalia Scholarship Fund
- St. Anthony of Padua (Grand Rapids)
- John O'Donnell Memorial Scholarship Fund
- Jim & Josie Dirkes Scholarship Fund
- St. Charles
- St. Dominic
- St. Edward
- St. Gregory
- St. Isidore
- St. James (Montague)
- St. John the Baptist Fr. Jim Cusack Parish Scholarship Fund
- St. Joseph - St. Mary
- St. Joseph (Wright)
- St. Jude
- St. Mary-St. Paul (Big Rapids)
- Rosalinda Parsons Fund
- Foundation Fund
- Barbara Borth Fund
- St. Mary (Carson City)
- St. Mary (Loveland)
- St. Mary (Miriam)
- St. Mary Fr. Ernest J. Barnett Educational Endowment Fund (Muskegon)
- St. Mary (Spring Lake)
- St. Mary Magdalen (Kentwood)
- St. Michael (Brunswick)
- St. Michael (Coopersville)
- St. Michael (Ravens)
- St. Patrick - St. Anthony (Grand Haven)
- College Scholarship Fund
- St. Patrick (Parnell)
- St. Patrick (Portland)
- Youth Ministry Fund
- St. Paul Newman Center Fund (Big Rapids)
- St. Paul the Apostle (Grand Rapids)
- St. Stanislaus
- St. Stephen
- Peter M. Wege Scholarship Fund
- Sophia Louise Wege Scholarship Fund
- Mabel Sullivan Scholarship Fund
- Dorothy Thomas Scholarship Fund
- Monsignor LeBloux Scholarship Fund
- Swanson Scholarship Fund
- Cunningham/McCahill Fund
- Wege Teacher Benefit Enhancement Fund
- Julia Hartman Klein Educational Fund
- STAR Scholarship Fund

### Total Assets

$49,577,858
Mr. and Mrs. Douglas Aalderink
Mr. and Mrs. David Antcliff
Mr. and Mrs. James Avery
Mr. and Mrs. Peter Baldwin
Mr. and Mrs. Donald Baker
Mr. Larry Barcheski
Mr. and Mrs. Owen Bieber
Mr. and Mrs. Noel Black
Mr. and Mrs. Bruce Blakeman
Mr. and Mrs. Charles Bloom
Mr. and Mrs. Michael Byars
Mr. and Mrs. Norman Byrne
Mr. and Mrs. Jack Carr
Dr. and Mrs. Donald Condit
Mr. and Mrs. Robert Cooley
Mr. and Mrs. Thomas Deja
Rev. Norman Droski
Mr. and Mrs. Richard Dubridge
Ms. Suzanne Dufresne
Mr. and Mrs. James Ens
Ms. Barbara Boland
Ms. Marie Burns
Mr. and Mrs. Michael Byars
Mr. and Mrs. Norman Byrne
Mr. and Mrs. Jack Carr
Dr. and Mrs. Donald Condit
Mr. and Mrs. Robert Cooley
Mr. and Mrs. Thomas Deja
Rev. Norman Droski
Mr. and Mrs. Richard Dubridge
Ms. Suzanne Dufresne
Mr. and Mrs. James Ens
Erhardt Construction
Ms. Juanita Fabian
Mr. and Mrs. Dane Flegel
Ms. Julie Forbes
Ms. Barbara Jackson
AJ Flogge Performing Arts fund of the Community Foundation for Muskegon County
Mr. and Mrs. Wayne Gagnon
Ms. Donna Garland
Mr. and Mrs. Peter Gortz
Mr. and Mrs. Gregory Grabow
Mr. and Mrs. Ronald Graham
Mr. and Mrs. Greg Griffith
Mr. James Hackett, Sr.
Mrs. Barbara Hansen
Mr. and Mrs. David Harkema
Mr. and Mrs. David Haskin
Mr. and Mrs. Michael Havelka
Mr. Ralph Kauernstein
Mr. and Mrs. Jeffrey Hawkins
Mr. and Mrs. Thomas Herman
Mr. and Mrs. Larry Havis
Mr. James Hudson
Mr. and Mrs. Patrick Huhn
Most Rev. Walter Hurley
Mr. Robert Israel
Mr. and Mrs. Barbara Jackson
Mr. and Mrs. Robert Jones
Mr. John Kammeenzind
Mr. and Mrs. Jack Kelly
Mr. David Kendall
Mr. and Mrs. Roger Kieras
Mr. and Mrs. Dave Killoran
Mr. and Mrs. Donald Klein, Sr.
Mr. and Mrs. Daniel Klein
Mr. and Mrs. Ryan Kier
Ms. Amy Albin
Dr. and Mrs. Paul Korte
Mrs. Mary Ellen Kohl
Mr. and Mrs. John Kraus
Mr. and Mrs. Edwin Kuberski
Mr. and Mrs. Kevin Lagenbach
Mr. and Mrs. Brian Lee
Mr. and Mrs. Brad Lehmkuhl
Mr. Theodore Lehnen
Mr. and Mrs. David LeMire
Mr. Thomas Linick
Mr. David McAuliffe
Deacon and Mrs. Robert McCuticic
Mr. and Mrs. Lee McCormick
Mr. and Mrs. Kevin McDowell
Mr. and Mrs. Edmund McFarland
Mr. and Mrs. Leonard McKiever
Mr. and Mrs. Kevin McKee
Mr. and Mrs. Scott McPherson
Mr. and Mrs. Jeffrey Maddox
Mr. and Mrs. Henry Makarowicz
Mr. and Mrs. Jamie May
Ms. Mary May
Ms. Kim Mitchell
Mr. and Mrs. Dennis Moline
Mr. and Mrs. Thomas Morganhan
Mr. Louis Moran
Honorable William and Mrs. Murphy
Myszkiewicz and Assoc.
Ms. Rose Nanzig
Mr. and Mrs. John Neary
Ms. Ethel Niles
Mr. and Mrs. Michael Novakoski
Mr. John Nowak
Mr. and Dr. Dan O’Brien
Mr. and Mrs. Norman Ochs
Dr. and Mrs. Richard Pasek
Mr. and Mrs. Robert Paul
Mr. and Mrs. Michael Pauloski
Mr. James Peterson
Mrs. Rosalie Polaschik
Rev. Mark Przybysz
Mr. and Mrs. Patrick Quinn
Mr. and Mrs. Ralph Rader
Rev. Julian Regnato
Mr. and Mrs. Timothy Reno
Ms. Therese Rich
Mr. and Mrs. John Roberts
Most Rev. Robert Rose
Estate of Fr. Thomas Schiller
Mr. and Mrs. Charles Schwallie
Mr. and Mrs. Robert Schmidt
Ms. Maria Schmitt
Mr. David Shiaoenn
Mr. and Mrs. George Sharpe
Mr. and Mrs. Thomas Shunta
Mr. and Mrs. William Sizemore
Ms. Michelle Simpson
Mrs. Leann Smith
Mr. and Mrs. Paul Snow
Mr. and Mrs. Robert Stander
Rev. Mgr. Terrence Stewart
Ms. Jeanine Stuckmeyer
Mr. and Mrs. Joseph Susnik
Mr. and Mrs. Norman Szubinski
Mr. and Mrs. James Toney
Mr. and Mrs. Michael Thomas
Rev. John Thome
Mr. Paul Thull
Mr. and Mrs. Joseph Tomaszewski
Mr. and Mrs. Michael Torrey
Ms. Lynn Trestak
M. Turcotte
Mr. and Mrs. John Vander Gaan
Mr. and Mrs. Patrick VanKuilen
Mr. and Mrs. John Votaw
Mr. Eugene Viss, Sr.
Mr. and Mrs. Tom Wolter
Mr. and Mrs. John Wachburn
Rev. Donald Weber
Mr. and Mrs. George Weber
Mr. and Mrs. Robert Wells
Mr. and Mrs. James Wemple
Mr. and Mrs. Joseph Westdorp
Mr. and Mrs. Ronald Westfield
Dr. James A. Will, DVM
Mr. and Mrs. Stephen Williams
Mr. and Mrs. Tom Williams
Mr. and Mrs. Robert Wimer
Mr. and Mrs. Jerome Wittkowsi
Mr. John M. Wolf Trust
Mrs. Mary P. Wolf Trust
Mr. and Mrs. Jerry Woodoox
Mrs. Leona Zimmerx
The Catholic Parish Worship Structure:
Renovation, Maintenance and Construction Fund

Beginning his career as an altar boy at St. Adalbert Parish in 1945 and retiring in 2003 as a Grand Rapids diocesan priest, Father Norm Droski has spent many hours praying, preparing for Mass and celebrating the sacraments in numerous churches. The time he has devoted and the beautiful events he has witnessed within the sanctuary of our Catholic churches has afforded him a unique perspective.

As an expression of his love for the Church and our faith community, Father Norm established a fund to help maintain the beauty of our churches; the sacred structures that serve as our centers for worship. The church building, our sacred structure for divine worship, is the gathering space where as a family, our faith community celebrates Mass—a paschal meal. Together at church, we celebrate the sacraments, raise our voice in song, pray the words of our savior and stand in silent meditation.

The Catholic Parish Worship Structure: Renovation, Maintenance and Construction Fund, established by Father Norm Droski this past year, will forever be a financial resource for parishes in our diocese.
CHARITABLE GIFT ANNUITIES

The following have purchased Charitable Gift Annuities that benefit their parish, Catholic schools, agencies and/or the Diocese of Grand Rapids through The Catholic Foundation of West Michigan

Ray Sikanas
Herbert and Glenna Knape
Alice Friar
Floyd Kuehn
Rev. Kenneth Schichtel
Francis Baker
Margaret Gire

A faith which is lived out in a serious manner gives rise to acts of authentic charity.

~Pope Francis
### Statements of Financial Position

<table>
<thead>
<tr>
<th></th>
<th>June 30, 2016</th>
<th>June 30, 2015</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ASSETS</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cash and cash equivalents</td>
<td>$264,092</td>
<td>$93,579</td>
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<tr>
<td>Investments</td>
<td>$49,324,410</td>
<td>$49,997,200</td>
</tr>
<tr>
<td>Total assets</td>
<td>$49,588,502</td>
<td>$50,090,779</td>
</tr>
<tr>
<td><strong>LIABILITIES AND NET ASSETS</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Liabilities:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deposits</td>
<td>$43,991,698</td>
<td>$44,454,273</td>
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<tr>
<td>Accounts payable</td>
<td>$12,329</td>
<td>$13,172</td>
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<tr>
<td>Total liabilities</td>
<td>$44,004,027</td>
<td>$44,467,445</td>
</tr>
<tr>
<td>Net assets - unrestricted</td>
<td>$5,584,475</td>
<td>$5,623,334</td>
</tr>
<tr>
<td>Total liabilities and net assets</td>
<td>$49,588,502</td>
<td>$50,090,779</td>
</tr>
</tbody>
</table>

### Year Ended June 30, 2016

<table>
<thead>
<tr>
<th></th>
<th>Year Ended June 30, 2016</th>
<th>Year Ended June 30, 2015</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>REVENUES</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Interest and dividends on investments</td>
<td>$1,014,926</td>
<td>$972,755</td>
</tr>
<tr>
<td>Net change in fair value of investments</td>
<td>-$565,351</td>
<td>$1,086,938</td>
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<tr>
<td>Less: Investment and administrative expenses</td>
<td>-$347,426</td>
<td>-$246,536</td>
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<tr>
<td>Net revenues</td>
<td>$102,149</td>
<td>$1,813,157</td>
</tr>
<tr>
<td>Allocations to participant accounts</td>
<td>$151,648</td>
<td>$1,574,006</td>
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<tr>
<td>Excess of revenues over allocations to participant accounts</td>
<td>-$49,499</td>
<td>$239,151</td>
</tr>
<tr>
<td><strong>OTHER REVENUES (EXPENSES)</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contributions</td>
<td>$199,640</td>
<td>$41,020</td>
</tr>
<tr>
<td>Grants</td>
<td>-$189,000</td>
<td>-$179,000</td>
</tr>
<tr>
<td>Administrative expenses</td>
<td></td>
<td>-$32,054</td>
</tr>
<tr>
<td><strong>CHANGE IN UNRESTRICTED NET ASSETS</strong></td>
<td></td>
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<tr>
<td>NET ASSETS</td>
<td>-$38,859</td>
<td>$69,117</td>
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<tr>
<td><strong>NET ASSETS AT BEGINNING OF YEAR</strong></td>
<td>$5,623,334</td>
<td>$5,554,217</td>
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<tr>
<td><strong>NET ASSETS AT END OF YEAR</strong></td>
<td>$5,584,475</td>
<td>$5,623,334</td>
</tr>
</tbody>
</table>
How to Establish a Fund within The Catholic Foundation of West Michigan

Parishes, individuals, families, agencies, schools or businesses may create a permanent endowment fund. Gifts also may be made to existing endowment funds that support the causes most meaningful to donors. The funds are invested and generate an ongoing source of revenue for the Diocese of Grand Rapids or any designated program or organization. Donors may name the fund in memory of, or in honor of their family, friend or a loved one. Anonymity is an option.

Policies and Guidelines

The following are the basic policies and guidelines governing participation in The Foundation:

1. Any diocesan organization may establish an endowment in The Catholic Foundation of West Michigan (The Foundation) with a minimum initial contribution of $10,000.

2. A named fund may be established with a minimum initial contribution of $5,000 with a pledge of increasing the balance to $25,000 during one’s lifetime or within their estate plan. Distributions from the fund will be made once the fund balance has reached or exceeded $25,000.

3. Donors may add any amount to existing endowment funds within The Foundation.

4. All assets placed into an endowment fund are held in trust by The Foundation and are no longer available for use by the donor or organization. Distributions of earnings on the assets are governed by The Foundation Distribution Policy.

5. There are two stages to establish an endowment in The Foundation. The first, initial preparation, involves preliminary contact by the donor or organization with the diocesan finance office and their discussion of fund purposes and ongoing operation. The second, formal application, includes completion of establishing documents by the donor or organization.

6. Endowment fund agreements for organizations other than parishes must specify what happens to the earnings should the benefitting organization or ministry cease to exist or operate.

7. The Foundation’s funds are invested with the Michigan Catholic Conference Socially Responsible Investment Pool, which was established in order to allow Michigan dioceses and related organizations to pool funds for investment in the fixed income and equity markets using socially responsible investment guidelines while minimizing portfolio expenses.

8. The Foundation utilizes professional investment management to diversify holdings, minimize risk and optimize returns.

9. The Foundation will consider gifts such as cash, securities, art, collectibles and other marketable assets. Unusual gifts may require review before acceptance.
Your Guide to Giving

There are many ways to give and leave a legacy. The Catholic Foundation of West Michigan (CFWM) accepts gifts of cash, appreciated securities and real estate. All gifts are tax deductible to the full extent of the law and you choose the parish, school or charitable organization to benefit from your gift.

<table>
<thead>
<tr>
<th>GIFTS THAT START MAKING A DIFFERENCE TODAY</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>TYPE</strong></td>
</tr>
<tr>
<td>Add to an Existing Fund</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Endowments</td>
</tr>
<tr>
<td></td>
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<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>GIFTS THAT GIVE BACK – LIFE INCOME GIFTS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>TYPE</strong></td>
</tr>
<tr>
<td>Charitable Remainder Trust</td>
</tr>
<tr>
<td></td>
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<tr>
<td></td>
</tr>
<tr>
<td>Charitable Lead Trust</td>
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<table>
<thead>
<tr>
<th>GIFTS THAT BEAR FRUIT LATER – DEFERRED GIFTS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>TYPE</strong></td>
</tr>
<tr>
<td>Testamentary Gifts</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Life Estate Agreement</td>
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</tr>
</tbody>
</table>
LEADERSHIP

Trustees
Most Reverend David J. Walkowiak
President
Bishop of Grand Rapids

Reverend Monsignor William Duncan
Vice President
Vicar General
Moderator of the Curia
Diocese of Grand Rapids
Pastor
St. Sebastian Parish
Byron Center

Advisory Board
Roy Lorenz
Board Chair
St. Francis de Sales Parish
Muskegon

Christine Stander
St. Sebastian Parish
Byron Center

Jim Wojcynski
St. Robert of Newminster Parish
Ada

Paul Snow
Immaculate Heart of Mary Parish
Grand Rapids

Lois Jandernoa
Cathedral of Saint Andrew
Grand Rapids

Mary Panek
Assumption of the Blessed Virgin Mary
Parish
Belmont

Staff
Mark Morrow
Executive Director
The Catholic Foundation of West
Michigan

Jean Katt
Director of Marketing and Development
The Catholic Foundation of West
Michigan

Annalise Laumeyer
Director of Communications
Diocese of Grand Rapids

Legal Counsel
Varnum, Riddering, Schmidt and
Howlett
Grand Rapids

Auditor
Beene Garter, LLP
Grand Rapids

Asset Custodian
Northern Trust Company
Chicago, Illinois

Investment Advisor
CapTrust Advisors
Tampa, Florida

FORMER ADVISORY BOARD MEMBERS

Mr. Marc Brown†
Reverend James Cusack†
Mrs. Mary Ann DeWitt
Assumption of the Blessed Virgin
Mary Parish
Belmont

Mrs. Margo Gagnon
Assumption of the Blessed Virgin
Mary Parish
Belmont

Mr. Michael Jandernoa
Immaculate Heart of Mary Parish
Grand Rapids

Mr. Walter Jones
Our Lady of the Lake Parish
Holland

Mr. John Kennedy
St. Thomas the Apostle Parish
Grand Rapids

Sister Patrice Konwinski
The Dominican Sisters
Grand Rapids

Mrs. Virginia Moralez
Holy Redeemer Parish
Jenison

Mr. Brian Plachta
Blessed Sacrament Parish
Grand Rapids

Mr. Patrick Quinn
St. Paul the Apostle Parish
Grand Rapids

Reverend Julian Reginato
St. Francis de Sales Parish
Norton Shores

Mr. Lee Renterghem
St. Charles Borromeo Parish
Greenville

Reverend Monsignor
Ernest P. Schneider
St. Paul the Apostle Parish
Grand Rapids

Reverend Monsignor
Terrence L. Stewart
Holy Family Parish
Sparta

Mr. Patrick VanHaren
St. Robert of Newminster Parish
Ada

†Deceased