The answer is YES
2013 ANNUAL REPORT
Since 2001, The Catholic Community Foundation has supported effective philanthropy in Southeastern Wisconsin through two main roles:

- Helping donors establish permanent charitable funds to create long-lasting support for the causes they care about
- Offering parishes, schools and other Catholic organizations cost-effective, socially responsible investment management to keep endowment assets growing

Left to right: Mary Ellen Markowski, President; Julie Kurer, Administrative Coordinator; and John Blickle, Controller

The answer is YES
Ways to say YES – and create a legacy

“Everyone, no matter where they are in life, has an obligation to improve the world. Find a place where you can help out. Call it giving back or paying forward or whatever you want to call it; it’s part of the deal.”

— Judy Keyes, Board Member and Community Volunteer

Through the Foundation, you can give to a Catholic cause or a cause that furthers the Church’s mission, primarily in Southeastern Wisconsin. Your gift is invested in a permanent endowment, from which we award grants each year. Choose from the following fund types, naming your fund to reflect your philanthropic purpose.

**Field of Interest Fund**
You indicate a charitable area of interest, and we find grant recipients in that area.

**Unrestricted Fund**
You give the Foundation full discretion in awarding grants.

**Advised Fund**
You recommend charitable organizations for grants, with the option to change recipients from year to year. Advised funds may offer you more advantages than a private foundation.

**Designated Fund**
You create a fund to benefit one or more specific charitable agencies or organizations.
Over the years, Judy Keyes has found numerous places to help out. She’s currently a board member for Marquette University’s Restorative Justice Initiative, Marquette University Women’s Council, Frankly Music, Notre Dame Middle School, and The Catholic Community Foundation. She’s also a leading supporter of the Milwaukee Symphony Orchestra, Milwaukee Art Museum, Milwaukee Repertory Theater, and supports other community organizations through her work at Gesu Parish.

A Wisconsin native, Judy attended Divine Savior High School and Marymount College in New York. She has taught math at middle school, high school and college levels, and volunteered as a tutor for nearly 25 years. Judy says her parents set an example of giving back, and she’s carrying on the tradition with her seven grandchildren, holding annual “mini-grant” sessions in which each grandchild chooses a charitable recipient that reflects his or her interests.

Grants from her fund with The Catholic Community Foundation go primarily to Notre Dame Middle School, where Judy chairs the Education Committee and organizes a summer school program that brings incoming fifth graders up to speed in math. “It’s nice to volunteer someplace where you see good results,” she says.

Judy adds that the Foundation makes it easy to make a difference. “You know that when you give a grant, the organizations are well-vetted,” she says. “Your money gets invested wisely, you have control over who receives grants, and you don’t have to do the paperwork. It’s wonderful!”
Donors who said YES –and impact the community

“The Foundation made it so easy for Ethel and me to decide on this. It is a perfect way for individuals to continue to help those organizations they supported during their lifetimes. You can keep making your gifts even though you’re no longer alive. It’s the gift that keeps on giving!”

— Carl Groth, West Bend

Donor Funds Within the Foundation

- Joseph F. and Catherine M. Bennett Family Fund
- Fred and Karen Bersch Family Fund
- Bishop Brust Memorial Fund
- Building the Faith General Fund
- James and Mary Crewe Rome Fund
- Reverend Leslie Darnieder Scholarship Fund
- Sarah M. Dean Fund
- DePorres Scholarship Fund
- Directors Legacies of Faith Fund
- Henry and Francine Ducat Fund
- Education Endowment Fund
- Carl and Ethel Groth Endowment Fund
- Brian D. Hanley Fund
- Father Gerald B. Hauser and John and Ruth Kegel Priesthood Scholarship Fund
- John C. (Jack) and Hildegard A. Heegeman Scholarship Fund
- RWH and EMH Estate Fund
- JCC Fund
- Rev. Carl M., Eugenia, and Lauretta Kazmierczak Priesthood Support Fund
- Judith A. Keyes Family Fund
- Legacy Fund for Tomorrow’s Present: A Lasting Tribute to the Work of Lisa-Marie Calderone-Stewart, Ed.D.
- Mission Fund
- Marilyn C. Schmit, PhD Fund
- St. Aemilian Fund
- St. Anthony Fund
- St. Gerard Association Endowed Scholarship Fund
- Allen and Diane Spaeth Charitable Fund
- Archbishop Rembert G. Weakland Fund
- Whelandale Trust
- Charles and Sara Wieber Family Fund
- Yaniak Fund
Catholic organizations say YES – and grow their endowments

“The effective way in which funds are managed, the history of success in performance returns, and the clear and consistent manner in which financial reports are communicated are all signs that The Catholic Community Foundation truly is a ‘good and faithful steward’ of our parish’s treasure.”

— The Very Reverend Jeff Haines, Rector and Pastor
The Cathedral of St. John the Evangelist

The Foundation’s assets under management include endowment funds of local parishes, schools and other Catholic organizations. Funds are pooled in a well-diversified, socially responsible portfolio to maximize cost savings and investment performance.

Agencies*

Many of these agencies have multiple funds.

- Archdiocese of Milwaukee
- The Cathedral of St. John the Evangelist, Milwaukee
- Catholic Charities of the Archdiocese of Milwaukee, Inc.
- Christ King, Wauwatosa
- Congregation of Good Shepherd, Eden
- Divine Savior Holy Angels High School
- Faith In Our Future Trust
- Holy Family, Whitefish Bay
- Lumen Christi, Mequon
- Marquette University High School
- Our Lady of Divine Providence, Milwaukee
- St. Alphonsus, Greendale
- St. Andrew, Delavan
- St. Anthony on the Lake, Pewaukee
- St. Bernard, Wauwatosa
- St. Boniface, Germantown
- St. Bruno, Dousman
- St. Dominic, Brookfield
- St. Edward, Racine
- St. Eugene, Fox Point
- St. Frances Cabrini, West Bend
- Saint Francis de Sales Seminary
- St. John Vianney, Brookfield
- St. Kilian Congregation, Hartford
- St. Leonard, Muskego
- St. Luke, Brookfield
- St. Margaret Mary, Milwaukee
- St. Martin de Porres, Milwaukee
- St. Mary, Dover
- St. Mary, Waukesha
- St. Mary’s Congregation, Elm Grove
- St. Peter, Kenosha
- Ss. Peter and Paul, Milwaukee
- St. Robert Bellarmine, Union Grove
- St. Roman, Milwaukee
- St. Theresa, Eagle
- Salesianum Alumni/AE Association
- Sheboygan County Catholic Fund, Inc.
- Society for the Propagation of the Faith
- Three Holy Women, Milwaukee

*Grants at the discretion of the agency
**Together we say YES – and change lives**

“We are thankful for the grants we receive from The Catholic Community Foundation because they help us offer one of the most comprehensive mandatory after school enrichment programs in the city.”

— Mary McIntosh, President

Notre Dame Middle School

---

**Grant Recipients**

The Catholic Community Foundation this fiscal year 2012/2013 awarded $635,505 in grants for programs/projects that support our four priorities. We focus on four areas: education; leadership development; health care for the underserved in Milwaukee; and community building to strengthen families, parishes and those suffering from poverty, discrimination and violence. Since inception, the Foundation has awarded over $4,622,000 in grants.

The following organizations received grants from donor funds within the Foundation.

<table>
<thead>
<tr>
<th>Grant Recipient</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bread of Healing Clinic, Inc.</td>
<td>$ 5,000</td>
</tr>
<tr>
<td>Cardinal Stritch University</td>
<td>$ 1,775</td>
</tr>
<tr>
<td>Casa Romero Renewal Center, Inc.</td>
<td>$ 7,500</td>
</tr>
<tr>
<td>The Cathedral Center, Inc.</td>
<td>$15,000</td>
</tr>
<tr>
<td>Catholic Charities</td>
<td>$15,000</td>
</tr>
<tr>
<td>Catholic Memorial High School</td>
<td>$ 6,000</td>
</tr>
<tr>
<td>Catholic Stewardship Appeal</td>
<td>$ 3,900</td>
</tr>
<tr>
<td>CommonGround Ministry, Inc.</td>
<td>$10,000</td>
</tr>
<tr>
<td>Congregation of Holy Angels, West Bend</td>
<td>$19,595</td>
</tr>
<tr>
<td>Daystar</td>
<td>$10,000</td>
</tr>
<tr>
<td>Dismas Ministry</td>
<td>$ 3,000</td>
</tr>
<tr>
<td>Divine Mercy School</td>
<td>$ 8,500</td>
</tr>
<tr>
<td>Family Unity International, Inc.</td>
<td>$  550</td>
</tr>
<tr>
<td>Adult Learning Center</td>
<td>$ 5,000</td>
</tr>
<tr>
<td>All Saints Catholic School, Kenosha</td>
<td>$ 2,000</td>
</tr>
<tr>
<td>Alverno College</td>
<td>$ 3,000</td>
</tr>
<tr>
<td>Archdiocese of Milwaukee – Priest Service Awards</td>
<td>$ 2,000</td>
</tr>
<tr>
<td>Archdiocese of Milwaukee – Retired Priests’ Needs</td>
<td>$17,810</td>
</tr>
<tr>
<td>Archdiocese of Milwaukee – Program Support</td>
<td>$20,000</td>
</tr>
<tr>
<td>Archdiocese of Milwaukee</td>
<td>$ 9,714</td>
</tr>
<tr>
<td>Basilica of the National Shrine of Mary Help of Christians at Holy Hill, Hubertus</td>
<td>$ 364</td>
</tr>
<tr>
<td>Benedict Center, Inc.</td>
<td>$12,000</td>
</tr>
<tr>
<td>Bethany Apartments, Racine</td>
<td>$10,000</td>
</tr>
<tr>
<td>Blessed Sacrament School</td>
<td>$ 1,500</td>
</tr>
</tbody>
</table>
Grant Recipients, continued

- Feeding America Eastern Wisconsin $1,000
- Foundation for Religious Retirement $4,857
- The Gathering of Southeast Wisconsin, Inc. $12,000
- Gesu Parish $2,760
- Glenmary Sisters $3,853
- Holy Angels School Trust Fund, West Bend $19,958
- Holy Wisdom Academy $1,000
- Hope Center $10,000
- House of Peace $10,000
- Hunger Task Force, Inc. $2,500
- John Paul II Academy, Racine $9,000
- Make A Difference Wisconsin $2,000
- Marquette University $6,000
- Marquette University High School $1,500
- Mary, Queen of Saints Catholic Academy $9,000
- Medical College of Wisconsin-Saturday Clinic for the Uninsured $10,000
- Melanoma Research Foundation, Washington, D.C. $1,400
- Messmer Catholic Schools-St. Leo and St. Rose School $7,500
- Milwaukee Center for Children and Youth, Inc. $5,000
- Milwaukee Christian Center, Inc. $10,000
- Milwaukee Habitat for Humanity $500
- Milwaukee Homeless Veterans Initiative $5,000
- Near South Side Catholic Schools Association $17,000
- New Threads of Hope $10,000
- Northwest Catholic School $5,000
- Notre Dame Middle School $11,120
- Office for World Mission $12,540
- Office of the Propagation of the Faith $1,105
- Penfield Children's Center $16,000
- Prevent Blindness Wisconsin, Inc. $5,000
- Repairers of the Breach $12,000
- Sacred Heart School of Theology $3,500
- St. Adalbert School $1,500
- St. Andrew Parish School, Delavan $5,000
- St. Benedict Community Meal $12,000
- St. Ben's Clinic at the Cathedral Center $11,000
- St. Boniface Parish School, Germantown $2,500
- St. Bruno Parish School, Dousman $7,500
- St. Catherine Residence $10,000
- St. Catherine's High School, Racine $9,500
- St. Charles Borromeo School $2,500
- St. Elizabeth Ann Seton Dental Clinic $12,000
- Saint Francis de Sales Seminary $6,310
- St. Gregory the Great School $3,500
- St. John the Evangelist School $3,500
- St. Josaphat School $500
- St. Joseph Foundation-Safe Place for Newborns Program $6,000
- St. Joseph's Indian School $500
- St. Martin of Tours Parish School, Franklin $5,000
- St. Matthias Parish School $2,500
- St. Peter Parish, Slinger $363
- St. Rafael the Archangel School $500
- St. Roman School $3,500
- St. Thomas Aquinas Academy $2,000
- Saint Thomas More High School, Inc. $9,500
- Salesian Missions $3,853
- Salvatorian Mission Warehouse $14,572
- School Sisters of Notre Dame $13,853
- SET Ministry, Inc. $10,000
- SHARP Literacy, Inc. $10,000
- Sisters of St. Francis of Assisi $3,853
- Sixteenth Street Community Health Center, Inc. $15,000
- Three Holy Women Parish $5,000
- Vision Forward Association, Inc. $15,000
- Women's Care Center, Inc. $10,000
## Statement of Financial Position  
### June 30, 2013 and 2012

### ASSETS

<table>
<thead>
<tr>
<th>Current Assets</th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash and cash equivalents:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Foundation</td>
<td>$128,535</td>
<td>$103,760</td>
</tr>
<tr>
<td>Agency funds</td>
<td>51,246</td>
<td>—</td>
</tr>
<tr>
<td>Accounts receivable</td>
<td>55,020</td>
<td>49,109</td>
</tr>
<tr>
<td>Prepaid expenses</td>
<td>4,025</td>
<td>4,127</td>
</tr>
<tr>
<td><strong>Total Current Assets</strong></td>
<td>$238,826</td>
<td>$156,996</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Property &amp; Equipment</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total Property &amp; Equipment</strong></td>
<td>$8,420</td>
<td>$13,650</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Investments (at fair value)</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Long-term investments</td>
<td>$22,973,819</td>
<td>$20,095,806</td>
</tr>
<tr>
<td>Agency funds</td>
<td>38,773,903</td>
<td>34,403,811</td>
</tr>
<tr>
<td><strong>Total Investments</strong></td>
<td>$61,747,722</td>
<td>$54,499,617</td>
</tr>
</tbody>
</table>

**TOTAL ASSETS**  

| **TOTAL ASSETS**               | $61,994,968 | $54,670,263 |

### LIABILITIES AND NET ASSETS

<table>
<thead>
<tr>
<th>Current Liabilities</th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounts payable:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Foundation</td>
<td>$86,699</td>
<td>$74,472</td>
</tr>
<tr>
<td>Agency Funds</td>
<td>76,016</td>
<td>66,809</td>
</tr>
<tr>
<td>Accrued liability</td>
<td>21,576</td>
<td>32,496</td>
</tr>
<tr>
<td>Current portion of capital leases</td>
<td>—</td>
<td>204</td>
</tr>
<tr>
<td><strong>Total Current Liabilities</strong></td>
<td>$184,291</td>
<td>$173,981</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Long-Term Liabilities</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Agency funds</td>
<td>38,749,133</td>
<td>34,337,002</td>
</tr>
<tr>
<td><strong>Total Long-Term Liabilities</strong></td>
<td>$38,749,133</td>
<td>$34,337,002</td>
</tr>
</tbody>
</table>

**TOTAL LIABILITIES**  

<table>
<thead>
<tr>
<th>Net Assets</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Unrestricted funds</td>
<td>$14,972,634</td>
<td>$12,505,831</td>
</tr>
<tr>
<td>Temporarily restricted funds</td>
<td>8,088,910</td>
<td>7,653,449</td>
</tr>
<tr>
<td><strong>Total Net Assets</strong></td>
<td>$23,061,544</td>
<td>$20,159,280</td>
</tr>
</tbody>
</table>

**TOTAL LIABILITIES AND NET ASSETS**  

| **TOTAL LIABILITIES AND NET ASSETS** | $61,994,968 | $54,670,263 |
### Statement of Activities  Year Ended June 30, 2013 and 2012

<table>
<thead>
<tr>
<th>Public Support and Revenue</th>
<th>Unrestricted</th>
<th>Temporarily Restricted</th>
<th>Year Ended 2013 Total</th>
<th>Unrestricted</th>
<th>Temporarily Restricted</th>
<th>Year Ended 2012 Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contributions</td>
<td>$1,620,102</td>
<td>—</td>
<td>$1,620,102</td>
<td>$3,202,057</td>
<td>—</td>
<td>$3,202,057</td>
</tr>
<tr>
<td>Interest and dividend income</td>
<td>189,557</td>
<td>$106,800</td>
<td>296,357</td>
<td>226,838</td>
<td>$154,000</td>
<td>380,838</td>
</tr>
<tr>
<td>Realized gains (losses) on investments</td>
<td>311,928</td>
<td>172,158</td>
<td>484,086</td>
<td>409,480</td>
<td>286,065</td>
<td>695,545</td>
</tr>
<tr>
<td>Unrealized gains (losses) on investments</td>
<td>975,559</td>
<td>575,271</td>
<td>1,550,830</td>
<td>(453,018)</td>
<td>(355,456)</td>
<td>(808,474)</td>
</tr>
<tr>
<td>Investment management fees</td>
<td>(91,275)</td>
<td>(51,238)</td>
<td>(142,513)</td>
<td>(71,973)</td>
<td>(48,550)</td>
<td>(120,523)</td>
</tr>
<tr>
<td>Administrative fee on agency endowments</td>
<td>152,661</td>
<td>—</td>
<td>152,661</td>
<td>135,041</td>
<td>—</td>
<td>135,041</td>
</tr>
<tr>
<td>Net assets released from restrictions</td>
<td>367,530</td>
<td>(367,530)</td>
<td>—</td>
<td>369,214</td>
<td>(369,214)</td>
<td>—</td>
</tr>
<tr>
<td><strong>Total Public Support and Revenue</strong></td>
<td><strong>$3,526,062</strong></td>
<td><strong>$435,461</strong></td>
<td><strong>$3,961,523</strong></td>
<td><strong>$3,817,639</strong></td>
<td><strong>$(333,155)</strong></td>
<td><strong>$3,484,484</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Expenses</th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Grants approved for charitable purposes</td>
<td>$635,505</td>
<td>—</td>
<td>$635,505</td>
<td>$527,532</td>
<td>—</td>
<td>$527,532</td>
</tr>
<tr>
<td>Program-related expenses</td>
<td>143,035</td>
<td>—</td>
<td>143,035</td>
<td>134,910</td>
<td>—</td>
<td>134,910</td>
</tr>
<tr>
<td>Supporting services:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Administrative expenses</td>
<td>280,719</td>
<td>—</td>
<td>280,719</td>
<td>268,207</td>
<td>—</td>
<td>268,207</td>
</tr>
<tr>
<td><strong>Total Expenses</strong></td>
<td><strong>$1,059,259</strong></td>
<td>—</td>
<td><strong>$1,059,259</strong></td>
<td><strong>$930,649</strong></td>
<td>—</td>
<td><strong>$930,649</strong></td>
</tr>
<tr>
<td>Change in Net Assets</td>
<td>$2,466,803</td>
<td>$435,461</td>
<td>$2,902,264</td>
<td>$2,886,990</td>
<td>$(333,155)</td>
<td>$2,553,835</td>
</tr>
<tr>
<td>Net Assets - Beginning of Year</td>
<td>$12,505,831</td>
<td>$7,653,449</td>
<td>$20,159,280</td>
<td>$9,618,841</td>
<td>$7,986,604</td>
<td>$17,605,445</td>
</tr>
<tr>
<td>Net Assets - End of Year</td>
<td>$14,972,634</td>
<td>$8,088,910</td>
<td>$23,061,544</td>
<td>$12,505,831</td>
<td>$7,653,449</td>
<td>$20,159,280</td>
</tr>
</tbody>
</table>
### Investments as of June 30, 2013

<table>
<thead>
<tr>
<th>Investment Type</th>
<th>Cost</th>
<th>Value</th>
<th>Fair Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash and cash equivalents</td>
<td>$336,499</td>
<td>$336,499</td>
<td>$336,499</td>
</tr>
<tr>
<td>Large/Mid-cap equities and S&amp;P 500 index fund</td>
<td>16,762,362</td>
<td>23,500,424</td>
<td></td>
</tr>
<tr>
<td>Domestic small-cap common stock</td>
<td>3,178,785</td>
<td>3,940,011</td>
<td></td>
</tr>
<tr>
<td>International equities</td>
<td>11,399,604</td>
<td>12,677,862</td>
<td></td>
</tr>
<tr>
<td>Commodities and inflation hedges</td>
<td>4,293,242</td>
<td>3,908,326</td>
<td></td>
</tr>
<tr>
<td>Bond mutual funds</td>
<td>13,860,206</td>
<td>13,633,590</td>
<td></td>
</tr>
<tr>
<td>Real estate</td>
<td>704,658</td>
<td>902,123</td>
<td></td>
</tr>
<tr>
<td>Hedge composite</td>
<td>2,425,000</td>
<td>2,848,887</td>
<td></td>
</tr>
<tr>
<td><strong>Total Investments</strong></td>
<td><strong>$52,960,356</strong></td>
<td><strong>$61,747,722</strong></td>
<td></td>
</tr>
</tbody>
</table>

### Investments as of June 30, 2012

<table>
<thead>
<tr>
<th>Investment Type</th>
<th>Cost</th>
<th>Value</th>
<th>Fair Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash and cash equivalents</td>
<td>$117,093</td>
<td>$117,093</td>
<td>$117,093</td>
</tr>
<tr>
<td>Large/Mid-cap equities and S&amp;P 500 index fund</td>
<td>15,816,833</td>
<td>19,415,104</td>
<td></td>
</tr>
<tr>
<td>Domestic small-cap common stock</td>
<td>2,874,005</td>
<td>3,414,288</td>
<td></td>
</tr>
<tr>
<td>International equities</td>
<td>10,920,237</td>
<td>11,391,184</td>
<td></td>
</tr>
<tr>
<td>Commodities and inflation hedges</td>
<td>3,874,544</td>
<td>3,716,046</td>
<td></td>
</tr>
<tr>
<td>Bond mutual funds</td>
<td>14,077,905</td>
<td>14,407,489</td>
<td></td>
</tr>
<tr>
<td>Real estate</td>
<td>836,318</td>
<td>942,837</td>
<td></td>
</tr>
<tr>
<td>Hedge composite</td>
<td>1,175,000</td>
<td>1,095,576</td>
<td></td>
</tr>
<tr>
<td><strong>Total Investments</strong></td>
<td><strong>$49,691,935</strong></td>
<td><strong>$54,499,617</strong></td>
<td></td>
</tr>
</tbody>
</table>
Estimates
The preparation of financial statements in conformity with accounting principles generally accepted in the United States of America requires management to make estimates and assumptions that affect the reported amounts of assets, liabilities, revenues and expenses and the disclosures of contingent assets and liabilities at the date of financial statements. Actual results could differ from these estimates.

Net Assets
Net assets, revenues, gains and losses are classified based on the existence or absence of donor-imposed restrictions. Accordingly, net assets of the Foundation are classified and reported as follows:

Unrestricted Net Assets
Net assets that are not subject to donor-imposed stipulations.

Temporarily Restricted Net Assets
Net assets subject to donor-imposed stipulations that either expire by passage of time or can be fulfilled and removed by actions of the Foundation pursuant to those stipulations.

Permanently Restricted Net Assets
Net assets subject to donor-imposed stipulations that they be maintained permanently by the Foundation. Currently, the Foundation does not have any permanently restricted net assets.

Agency Endowment Funds
Certain Catholic parishes and other organizations have transferred funds to the Foundation for management. These funds are invested with the other funds of the Foundation, but title is retained by the transferring organization and the funds are reflected in the statements of financial position of the Foundation as investments and the corresponding amounts listed as current and long-term liabilities.

The Catholic Community Foundation is audited annually. Copies of the complete audit reports are available upon request.

Tax-Exempt Status
The Foundation is exempt from federal and state income taxes on related exempt function income under Section 501(c)(3) of the Internal Revenue Code and has been classified as an organization other than a private foundation. The Foundation does not consider any of its support and revenues to be unrelated business income and, accordingly, no provision for income taxes has been provided in the accompanying financial statements.
Board of Directors

Debra Alder
President and CEO, Alder Companies

F. Jon Baranko
Chief Equity Officer, Wells Capital Management

Thuy Barron
Senior Manager, Deloitte Tax LLP

Leslie A. Blum
Real Estate Construction Consultant

Barbara Anne Cusack
Chancellor, Archdiocese of Milwaukee

Thomas J. Fischer
Fischer Financial Consulting LLC

John A. Herbers
Attorney, Reinhart Boerner Van Deuren SC

Most Rev. Donald J. Hying
Auxiliary Bishop, Archdiocese of Milwaukee

Rev. Daniel Janasik
Pastor, St. Leonard’s Parish

Judy Keyes
Community Volunteer

John J. Marek
Treasurer and Chief Financial Officer, Archdiocese of Milwaukee

Camela M. Meyer
Vice President and Trust Officer, Johnson Bank

David Morris
First Vice President, Financial Consultant, RBC Wealth Management

Ann M. Rieger
Attorney, Davis and Kuelthau SC

Maureen Stapleton
President, Stapleton Realty and Appraisal

Adam J. Wiensch
Attorney, Foley and Lardner LLP

Mary Ellen Markowski
President, The Catholic Community Foundation

Patricia L. Van Kampen
Chairperson of the Board, Community Volunteer, former Managing Director, Common Stock, Mason Street Advisors LLC

Staff

John Blickle
Controller

Julie Kurer
Administrative Coordinator
The Catholic Community Foundation is a not-for-profit Wisconsin Corporation, tax-exempt pursuant to Section 501(c)(3) of the Internal Revenue Code and governed by its own Board of Directors.

The Foundation is a separate civil and canonical entity independent of the Archdiocese of Milwaukee.

For more information on how you can provide for your community — in perpetuity — visit legaciesoffaith.org.