Rooted in faith. Growing in impact.

THE CATHOLIC COMMUNITY FOUNDATION®



2026 Annual Report

25 YEARS OF IMPACT

Since 2001,

The Catholic Community Foundation has supported effective philanthropy in Southeastern Wisconsin through two main roles:

1 **Helping donors** establish permanent charitable funds to create long-lasting support for the causes they care about

2 **Offering parishes, schools and Catholic organizations** cost-effective, socially responsible investment management to keep endowment assets growing

THE CATHOLIC COMMUNITY FOUNDATION®

Dear friends,



This year The Catholic Community Foundation celebrates 25 years of faith and impact. Over the years we've awarded more than $25.3 million in grants to causes that further the Church's mission in the 10 counties we serve in Southeastern Wisconsin and beyond.

As part of our 25th anniversary celebration, 10 parish schools, one from each county, will be randomly selected to receive a $20,000 Legacy Fund to support the school's Catholic mission. Recipients will be announced at our annual reception on December 2 and featured in next year's report.

The Foundation focuses on those Catholic causes that enhance education, leadership development, health care for the underserved, and community building. Through cost-effective, socially responsible investments, ongoing monitoring, and thoughtfully considered grants, the Foundation and our donors support a wide range of charitable organizations. In addition, our professional investment services help parishes and other Catholic agencies achieve long-term endowment growth to help secure their futures.

Father Michael Wolfe, pastor of Milwaukee's four central city parishes, says choosing the Foundation to manage the parishes' new endowment was "a no-brainer," given our focus on prudent, ethical investing and our connection with the Catholic community. Find his story on page 2.

At our fiscal year-end, Foundation donor and agency assets totaled $204 million. Grant awards, made from our $83 million in donor assets, totaled over $2.6 million in fiscal 2025/26. The most recent recipients are listed starting on page 10.

As a not-for-profit 501(c)(3) corporation, the Foundation is independent of the Archdiocese of Milwaukee. Our board of directors includes Catholic religious and community leaders. With our donors, we sustain and advance Catholic values and the Church's mission here in Southeastern Wisconsin.

We're ready to help you celebrate your legacy and impact. Let's discuss how the Foundation can facilitate your support of the causes important to you.

Sincerely,

Thomas Nolte
Chairman of the Board

Tony Nguyen
President

Make a lasting impact through faith and giving.
Scan the QR to donate.

Rooted in faith, growing in impact in Milwaukee's central city.



Father Michael Wolfe on the steps of St. Michael's Catholic Church, one of the four central city parishes he serves as pastor.

Father Michael Wolfe has always liked helping things grow.

"I grew up with my dad having a small landscaping business," he says. "I enjoy being outside and working in the yard."

Today Fr. Wolfe does his landscaping at his home with the Community of Saint Paul missionary group, and at the four Milwaukee parishes he serves as pastor: All Saints, St. Martin de Porres, St. Michael's, and St. Rose of Lima. But his day-to-day focus is helping to grow the presence of the kingdom of God, working with partners like The Catholic Community Foundation.

"With parishes in the most economically distressed zip codes of Milwaukee, we've needed for years to deal with immediate needs—keeping the lights on, keeping the buildings intact, keeping at least the staff that we have," Fr. Wolfe says. At the same time, he and the parishes' trustees wanted to help people feel secure about the Church's presence in the central city. And donors were asking for options to support the parishes as a group.

From surviving to thriving

At the parishes' request, Archbishop Jeffrey S. Grob established the Central City Catholic Parish Foundation in early 2026. In May, the parishes held a kickoff to introduce the foundation and raise money for an endowment to be managed by The Catholic Community Foundation.

The Catholic Community Foundation was a logical choice, says Fr. Wolfe. "For years, these parishes have benefited from Foundation grants for food outreach, religious education and refugee support programs."



At St. Michael's Catholic Church, grants from The Catholic Community Foundation have supported religious education and helped defray the cost of staff, office expenses and formation materials for Latino and Southeast Asian immigrants and refugees.





Faith



At St. Martin de Porres Catholic Church, grants from The Catholic Community Foundation have supported religious education, lay ministry and Big Brothers Big Sisters of Metro Milwaukee programs.

Equally important, the Foundation offers prudent investing that follows the ethical guidelines of the United States Catholic Conference of Bishops. “They’ve done our homework for us,” he says.

It also matters that The Catholic Community Foundation works to further the Church’s broader mission throughout Southeastern Wisconsin. Says Fr. Wolfe, “Anyone looking to support the Catholic presence in the central city by supporting our fund at The Catholic Community Foundation gets a lot of bang for their buck.”

With kickoff attendees witnessing Fr. Wolfe’s commitment and the parishes’ determination to go from “survive” to “thrive,” donations to the Central City Catholic Parish Foundation Fund quickly reached over $350,000.

“That’s a sign to me that the Holy Spirit is at work,” says Fr. Wolfe.

Guided on the journey

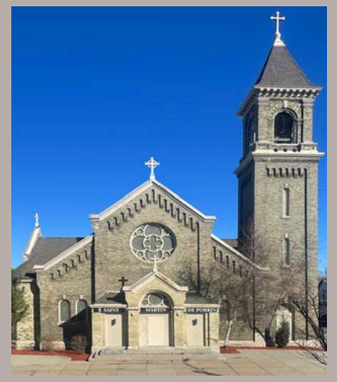
Fr. Wolfe also sees the Spirit at work in the experiences that brought him to the central city. His journey to the priesthood began at his boyhood parish, St. William in Waukesha (now part of Corpus Christi). In college, he visited La Sagrada Familia, the Archdiocese of Milwaukee’s sister parish in the Dominican Republic (which has also received grant funding from The Catholic Community Foundation). Eventually he joined the Community of Saint Paul there as a lay missionary.

“That combination of faith formation, sacramental work and service cemented my vocation,” he says. “By the time I started the seminary, I had lived and worked as a lay missionary in the Dominican Republic for six years.”

He was ordained in 2016, served at St. John Paul II in Milwaukee, then returned in 2019 to La Sagrada Familia as pastor. From there he served with the Community of Saint Paul in Bogotá, Colombia, a metropolitan area of about 11 million people.

“I was in a highly populated, impoverished, and what some considered a dangerous area,” Fr. Wolfe says. “That gave me roots in working with urban settings.”

He became pastor of Milwaukee’s central city parishes in 2024 and now also serves as Episcopal Vicar for Urban Ministry, drawing on his experiences working with diverse cultures. “In broad strokes, Saint Rose of Lima serves a Hispanic community, St. Michael’s includes East Asian refugee families, and All Saints and St. Martin de Porres serve African American and African families,” he says. “I do see God’s hand in preparing me for where I am. And I have a lot of comfort and peace that I’m where God wants me to be right now.”







> *“With parishes in the most economically distressed zip codes of Milwaukee, we’ve needed for years to deal with immediate needs—keeping the lights on, keeping the buildings intact, keeping at least the staff that we have.*









At All Saints Catholic Church, grants from The Catholic Community Foundation over the years have supported food pantry, meal and shelter programs, and most recently, helped fund development of a formation program for young Black Catholic adults.

Growing

At St. Rose of Lima Catholic Church, the English as a Second Language and Literacy Program has received support from The Catholic Community Foundation.







Easy-peasy

With the Central City Catholic Parish Foundation Fund, Fr. Wolfe says, the parishes have tapped into longstanding goodwill while increasing confidence among donors and parishioners. All funds are strictly for the support of the four parishes, with distributions determined by their foundation's board and major decisions approved by the archbishop.

Transparency is key, Fr. Wolfe says. "We've worked hard with the help of the archdiocese to ensure our financial reports meet professional accounting standards and to continue being transparent in how all parish funds are used."

Fr. Wolfe says he's been impressed with The Catholic Community Foundation's support. "I knew nothing about setting up a fund like this," he says. "They make it easy-peasy." That includes direct access to Foundation President Tony Nguyen. "This isn't a big firm where you just talk to some guy. Tony met with our trustees, who had a lot of questions. And he responded with patience and grace and knowledge."

A spiritual home

The central city parishes work to create a feeling of home, Fr. Wolfe says. "Our communities have been through a lot," he says. "Refugee families have told me stories of leaving at night, crossing dangerous terrain to get away from their own government. People who grew up here in Milwaukee have told me about having rocks thrown at them because of the color of their skin. These parishes, all four of them, are a place to feel safe, to feel dignified, to experience God's closeness and love."

The very existence of the fund helps enhance that feeling, he says. "This fund is looking to ensure that whatever may happen in the future, we as the archdiocese will have the means to bring Jesus to the central city through sacrament and service." ■



"Our communities have been through a lot ... Refugee families have told me stories of leaving at night, crossing dangerous terrain to get away from their own government.

People who grew up here in Milwaukee have told me about having rocks thrown at them because of the color of their skin.

These parishes, all four of them, are a place to feel safe, to feel dignified, to experience God's closeness and love.

– Father Michael Wolfe

Grow your impact.

The Catholic Community Foundation supports causes that further the Church's mission. As a perpetual endowment, the Foundation seeks ongoing growth to meet ever-growing needs.

We make philanthropy easy. You support important causes while reaping the benefits of professional investment management and experienced charitable fund administration.

1 **Start a fund,**
or give to an existing fund, with a gift of cash, securities or other assets. We can help structure your giving to fit your goals.

2 **Your gift is pooled**
with other funds in a diversified, socially responsible investment portfolio to minimize costs and maximize return potential.

3 **Investment returns add to your fund,**
supporting grants for your causes.

4 **You can be as involved as you choose**
in the annual grant awards.

Impact

Donor funds

Helping donors establish permanent charitable funds to create long-lasting support for the causes they care about.

- Robert T. Bautch and Randi L. Bautch Fund
- Joseph F. and Catherine M. Bennett Family Fund
- Fred and Karen Bersch Family Fund
- Les and Erin Blum Family Fund
- Betty Boland Natural Family Planning Fund
- Andrew F. Boldt Memorial Scholarship Fund
- Ralph A. Breit Fund
- Bishop Brust Memorial Fund
- The Rose M. Buckarma Fund
- Building the Faith General Fund
- James and Mary Crewe Rome Fund
- Rev. Leslie Darnieder Scholarship Fund
- Sarah M. Dean Fund
- DePorres Scholarship Fund
- Directors Legacies of Faith Fund
- Henry and Francine Ducat Fund
- Education Endowment Fund
- Elementary Education Endowment Fund for St. Leonard
- Faith in Action Fund
- Fischer Family, Our Lady of the Lake Fund
- Grace Fund
- Graff Family Fund
- Carl Groth 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
- The Help Fund
- John A. and Norma J. Herbers Fund
- Bob Hetzel Endowment Fund
- Debra A. Hintz Lay Ministry Fund
- Thomas E. and Kathleen M. Huevler Fund
- RWH and EMH Estate Fund
- JCC Fund
- J.O. Johnson, Victoria M. Johnson and Eileen K. Johnson Fund
- Rev. Carl M., Eugenia, and Lauretta Kazmierczak Priesthood Support Fund
- Judith A. Keyes Family Fund
- William and Carole Klovas Scholarship Fund
- Alexander J. Kluth II Benevolent Fund
- Audrey J. Komarek Fund
- Legacy Fund for Tomorrow's Present: A Lasting Tribute to the Work of Lisa-Marie Calderone-Stewart, Ed.D.
- Raymond G. and Theresa L. Markowski Family Fund
- Alfred H. Mattacotti Fund
- Robert L. and Elizabeth J. McGlynn Fund
- Paul M. and Carol A. McInerny Fund
- Camela M. Meyer Fund
- Elise T. and Paul W. Meyer Fund
- Mission Fund
- Fr. Richard Molter Fund
- Mary Agnes Navin Fund
- Mary A. Navin II Fund
- Frank Ortner Charitable Fund
- Stanley and Shirley Planinsheck for Holy Angels School Fund
- Reverend Eugene S. Pocernich Fund
- The Sacred Heart Fund
- St. Aemilian Fund
- St. Anthony Fund
- St. Gerard Association Endowed Scholarship Fund
- Bishop Richard Sklba Biblical Programs Fund
- Bishop Richard Sklba for Ecumenical and Interreligious Programs Within the Ten Counties of Southeastern Wisconsin Fund
- Marilyn C. Schmit, PhD Fund
- Robert J. Schoofs Fund
- Allen and Diane Spaeth Charitable Fund
- Fr. William Stanfield Charitable Trust
- Dianne and Len Stecklein Charitable Fund
- Mario and Mary Uy Family Fund
- Archbishop Rembert G. Weakland Fund
- Whelandale Trust
- Wieber Family Fund
- Dallas and Ann Marie Wixom Fund
- Yaniak Fund

Through the Foundation, you can give to a Catholic cause or causes that further 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.

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.

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.

Supporting foundation
Private foundations are welcome to become part of The Catholic Community Foundation.

Agencies

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.

Organizations may have multiple funds

- All Saints Catholic East School System, Milwaukee
- Archdiocese of Milwaukee
- Blessed Sacrament, Milwaukee
- The Cathedral of St. John the Evangelist, Milwaukee
- Catholic Charities of the Archdiocese of Milwaukee
- Central City Catholic Parishes, Milwaukee
- Christ King, Wauwatosa
- Congregation of Good Shepherd, Eden
- Corpus Christi Parish School, Waukesha
- Divine Savior Holy Angels High School, Milwaukee
- Faith In Our Future Trust
- Holy Cross, Bristol
- Holy Family, Fond du Lac
- Holy Family, Whitefish Bay
- Holy Sepulcher Cemetery, Cudahy
- Immaculate Conception, West Bend
- Lumen Christi, Mequon
- Marquette University High School, Milwaukee
- Messmer High School, Milwaukee
- Milwaukee Archdiocesan Office for World Mission, Inc.
- Our Lady of Divine Providence, Milwaukee
- Our Lady of the Holyland, Mt. Calvary
- Our Lady Queen of Peace, Milwaukee
- Sacred Heart, Racine
- Sacred Heart of Jesus, St. Francis
- Saint Francis de Sales Seminary
- Sheboygan North Catholic Parishes



- St. Alphonsus, Greendale
- St. Andrew, Delavan
- St. Boniface, Germantown
- St. Catherine, Milwaukee
- St. Charles, Hartland
- St. Charles Borromeo, Burlington
- St. Dominic, Brookfield
- St. Edward, Racine
- St. Frances Cabrini, West Bend
- St. James, Menomonee Falls
- St. James, Mukwonago
- St. John XXIII, Port Washington
- St. John the Evangelist, Twin Lakes
- St. John Vianney, Brookfield
- St. Leonard, Muskego
- St. Lucy, Racine
- St. Luke, Brookfield
- St. Martin de Porres, Milwaukee
- St. Mary, Dover
- St. Mary, Kenosha
- St. Mary, Menomonee Falls
- St. Mary's Visitation, Elm Grove
- St. Matthew, Campbellsport
- St. Matthew, Oak Creek
- St. Patrick, Racine
- St. Patrick, Whitewater
- St. Paul, Milwaukee
- St. Peter, Kenosha
- Ss. Peter and Paul, Milwaukee
- St. Pius X, Wauwatosa
- St. Richard, Racine
- St. Roman, Milwaukee
- St. Sebastian, Sturtevant
- St. Stephen, Oak Creek
- St. Theresa of Avila, Eagle
- St. Thomas Aquinas, Waterford
- St. Veronica, Milwaukee
- Society for the Propagation of the Faith
- Three Holy Women, Milwaukee

Grant recipients

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

- Able: Audio and Braille Literacy Enhancement
- Acts Housing
- All Saints Catholic Church, Milwaukee
- All Saints Catholic School, Kenosha
- Andean Health & Development
- Archdiocese of Milwaukee
- Ascension Wisconsin Foundation
- Benedict Center
- Beyond Vision, Inc.
- Blessed Sacrament School, Milwaukee
- Boys & Girls Club of Greater Milwaukee
- Boys & Girls Club of Washington County
- Bread of Healing Clinic
- Broadscope Disability Services
- Capuchin Community Services
- Casa Romero Renewal Center
- Cathedral of St. John the Evangelist, Milwaukee
- Catherine Marion Housing
- Catholic Central High School, Burlington
- Catholic Charities of the Archdiocese of Milwaukee
- Catholic Memorial High School, Waukesha
- Catholic Relief Services
- College Possible
- Congregation of Holy Angels, West Bend
- Convergence Resource Center
- Core El Centro
- Corpus Christi Parish School, Waukesha
- Crosier Fathers
- Curative Care Network
- Discalced Carmelite Friars of Holy Hill
- Dismas Ministry
- Divine Mercy School, South Milwaukee
- Divine Savior Catholic School, Fredonia
- Divine Savior Holy Angels High School, Milwaukee
- Dominican High School, Whitefish Bay
- Edmundite Missions
- Faith, Hope & Love
- Family Promise of Ozaukee County
- Family Promise of Waukesha County
- Family Sharing of Ozaukee County
- Father Gene's Help Center
- Feeding America Eastern Wisconsin
- Food Pantry of Waukesha County
- Foundation for Religious Retirement
- Franciscan Peacemakers
- Gesu Parish, Milwaukee
- Glenmary Sisters
- Habitat for Humanity
- HEAR Wisconsin
- Hmong American Friendship Association, Inc.
- Holy Apostles Parish School, New Berlin
- Holy Family Parish School, Whitefish Bay
- Holy Family Parish, Fond du Lac
- Hometown Heroes, Inc.
- Hope House of Milwaukee, Inc.
- Hunger Task Force
- Jesuit Refugee Services
- Jewish Family Services
- John Paul II Academy, Racine
- John XXIII Educational Center, Racine
- Kinship Community Food Center
- La Causa, Inc.
- Life Navigators
- Literacy Services of Wisconsin
- Lumen Christi Parish, Mequon
- Marquette University High School, Milwaukee
- Marquette University, Milwaukee
- Maryknoll Fathers and Brothers
- Maryknoll Lay Missioners
- Maryknoll Sisters
- Medical College of Wisconsin
- Messmer High School, Milwaukee
- Milwaukee Catholic Home
- Milwaukee Center for Children & Youth
- Milwaukee Community Crossroads
- Milwaukee Homeless Veterans Initiative
- Milwaukee Rescue Mission
- Missionary Oblates of Mary Immaculate
- Mount Mary University
- Nativity Jesuit Academy, Milwaukee
- New Threads of Hope
- Notre Dame School of Milwaukee
- Milwaukee Archdiocesan Office for World Mission, Inc.
- Our Lady of Guadalupe and St. Patrick's Parishes, Milwaukee
- Ozaukee Food Alliance
- Penfield Children's Center
- Philippine Cultural & Civic Center Foundation
- Pius XI Catholic High School
- Prevent Blindness Wisconsin
- Priests of the Sacred Heart
- Project Concern
- Project RETURN
- RedGen
- Saint Francis de Sales Seminary
- Salesian Missions
- Salvatorian Mission Warehouse
- Salvatorian Priests and Brothers
- School Sisters of Notre Dame
- School Sisters of St. Francis
- SecureFutures Foundation, Inc.
- Serenity Inns, Inc.
- Serving Older Adults
- Seton Catholic Schools, Milwaukee
- Sisters of Divine Savior
- Sisters of St. Francis of Assisi
- Soaring Eagle
- Society for the Propagation of the Faith
- SPRED Milwaukee
- St. Alphonsus Parish School, Greendale
- St. Anthony School of Milwaukee
- St. Bede Academy
- St. Catherine's High School, Racine
- St. Charles Borromeo School, Milwaukee
- St. Charles Parish School, Hartland
- St. Edward Parish, Racine
- St. Eugene School, Fox Point
- St. Francis Borgia, Cedarburg
- St. Francis Children's Center
- St. Joan Antida High School, Milwaukee
- St. John the Baptist School, Plymouth
- St. John the Evangelist, Greenfield
- St. Joseph Parish School, Big Bend
- St. Joseph Parish School, Grafton
- St. Lawrence Seminary, Mt. Calvary
- St. Leonard Parish School, Muskego
- St. Martin De Porres Catholic Church, Milwaukee
- St. Mary Parish School, Hales Corners
- St. Mary's Springs Academy, Fond du Lac
- St. Mary's Visitation Parish, Elm Grove
- St. Matthew School, Oak Creek
- St. Michael Catholic Congregation, Milwaukee
- St. Paul the Apostle, Mt. Pleasant
- St. Peter Parish, Slinger
- St. Robert School, Shorewood
- St. Roman Parish School, Milwaukee
- St. Rose of Lima Catholic Church, Milwaukee
- St. Sebastian Catholic School, Milwaukee
- St. Thomas Aquinas Academy, Milwaukee
- St. Thomas More High School, Milwaukee
- St. Vincent de Paul Society
- St. Vincent Pallotti School, Milwaukee
- The American Federation Pueri Cantores
- The Cathedral Center
- The Center for Working Families
- The Gathering of Southeast Wisconsin, Inc.
- The Guest House
- The Women's Center
- Three Holy Women, Milwaukee
- Trinity Missions
- United Community Center
- USCCB Office of National Collection
- Veritas Society Wisconsin Right to Life
- Victims of Milwaukee Violence Burial Fund
- Vision Forward Association
- Vivent Health
- Women's Care Center of Milwaukee
- Women's Support Center of Milwaukee

The Catholic Community Foundation has awarded more than $25.3 million in grants since inception. In fiscal 2025/2026 we awarded more than $2.6 million in grants for programs and projects that support four priorities:

Education
For students in Catholic schools and religious programs in kindergarten through twelfth grade.

Community building
To strengthen families, parishes and those suffering from poverty, discrimination and violence.

Leadership development
Informing leaders for parishes, schools and agencies that help advance the church.

Healthcare
For the underserved in Milwaukee.

Statement of financial position

June 30, 2026 and 2025

Assets	2026	2025
CURRENT ASSETS		
Cash and cash equivalents		
Foundation	$ 539,582	$ 114,958
Agency funds	390,054	–
Total Cash and Equivalents	929,636	114,958
Receivables:		
Accrued administrative fees on agency funds	115,170	97,754
Contribution receivables	58,135	53,301
Total Current Assets	1,102,941	266,013
OTHER ASSETS		
Prepaid expenses	3,225	3,225
Property and equipment (net)	18,424	20,545
Operating lease right of use assets	164,289	33,427
Investments (at fair value):		
Long-term investments	82,537,402	69,985,057
Agency funds	120,697,579	105,545,542
Total Investments	203,234,981	175,530,599
Total Other Assets	203,420,919	175,587,796
Total Assets	$ 204,523,860	$ 175,853,809

Liabilities and net assets	2026	2025
CURRENT LIABILITIES		
Accounts payable		
Foundation	$ 8,080	$ 15,127
Agency funds	176,689	198,446
Accrued liabilities	61,057	85,659
Current portion of operating lease liability	27,696	29,618
Total Current Liabilities	273,522	328,850
LONG-TERM LIABILITIES		
Operating lease liability, net of current portion	138,508	5,040
Agency funds	120,910,944	105,347,096
Total Long-Term Liabilities	121,049,452	105,352,136
Total Liabilities	121,322,974	105,680,986
NET ASSETS		
Without donor restrictions		
Undesignated	4,476,905	3,456,022
Board designated – field of interest, donor-advised and donor-designated	67,869,569	56,744,351
With donor restrictions		
Purpose restrictions	10,854,412	9,972,450
Total Net Assets	83,200,886	70,172,823
Total Liabilities and Net Assets	$ 204,523,860	$ 175,853,809

Statement of activities

June 30, 2026 and 2025

Public support and revenue	Without donor restrictions	With donor restrictions	Year ended 2026 total	Without donor restrictions	With donor restrictions	Year ended 2025 total
Interest and dividend income	$ 1,730,242	$ 278,355	$ 2,008,597	$ 1,500,667	$ 263,608	$ 1,764,275
Realized gains on investments	2,979,782	471,150	3,450,932	2,297,665	405,435	2,703,100
Unrealized gains on investments	3,934,711	640,599	4,575,310	3,082,747	535,250	3,617,997
Investment management fees	(236,863)	(37,476)	(274,339)	(280,143)	(49,165)	(329,308)
Net Investment Income (loss)	8,407,872	1,352,628	9,760,500	6,600,936	1,155,128	7,756,064
Contributions	6,105,644	–	6,105,644	3,615,927	50,000	3,665,927
Administrative fee on agency endowments	446,158	–	446,158	376,752	–	376,752
Net assets released from restrictions	470,666	(470,666)	–	455,633	(455,633)	–
Total Public Support and Revenue	15,430,340	881,962	16,312,302	11,049,248	749,495	11,798,743

Expenses						
Program Services						
Grants for charitable purposes	2,608,395	–	2,608,395	2,357,166	–	2,357,166
Grant administration expense	159,186	–	159,186	172,774	–	172,774
Supporting Services						
Management and general	305,920	–	305,920	321,443	–	321,443
Fundraising	210,738	–	210,738	280,370	–	280,370
Total Expenses	3,284,239	–	3,284,239	3,131,753	–	3,131,753
Change in Net Assets	12,146,101	881,962	13,028,063	7,917,495	749,495	8,666,990
Net Assets – July 1	60,200,373	9,972,450	70,172,823	52,282,878	9,222,955	61,505,833
Net Assets – June 30	$ 72,346,474	$ 10,854,412	$ 83,200,886	$ 60,200,373	$ 9,972,450	$ 70,172,823

Notes to financial statements

June 30, 2026 and 2025

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.

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.

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.

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:

NET ASSETS WITHOUT DONOR RESTRICTIONS
Net assets that are not subject to donor-imposed stipulation. The governing board has designated, from assets without donor restrictions, net assets for purposes of maintaining field of interest, unrestricted, donor-advised and donor-designated funds in perpetuity.

NET ASSETS WITH DONOR RESTRICTIONS
Net assets subject to donor (or certain grantor) imposed restrictions. Some donor-imposed restrictions are temporary in nature, such as those that will be met by the passage of time or by actions of the Foundation pursuant to those stipulations prescribed by the donor. Other donor-imposed restrictions are perpetual in nature, where the donor stipulates that resources be maintained in perpetuity. Donor-imposed restrictions are released when a restriction expires, that is, when the stipulated time has elapsed, when the stipulated purpose for which the resource was restricted has been fulfilled, or both. The Foundation had no net assets with donor restrictions required to be maintained in perpetuity during the years ended June 30, 2026 and 2025.

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

Board of directors



THOMAS J. NOLTE, CHAIRMAN
Community Volunteer;
former Director, Madison Investments



TONY NGUYEN, PRESIDENT
The Catholic Community Foundation

MARK J. ANDRES
Shareholder,
Fox, O'Neill, & Shannon, S.C.

CHRISTOPHER P. BROWN
Treasurer & Chief Financial Officer,
Archdiocese of Milwaukee

BARBARA ANNE CUSACK
Chancellor,
Archdiocese of Milwaukee

LISA UY FERNANDEZ
Community Volunteer;
former Managing Tax Director,
Deloitte Tax LLP

KRISTINE L. HAVLIK
Of Counsel,
Foley & Lardner LLP

KATHLEEN M. HUEVLER
Community Volunteer;
former Finance Manager,
ALS Association Wisconsin Chapter

MIKE JOECKEN
Senior Vice President,
Callan LLC

AMY S. KIISKILA
Director of Wealth Strategy,
Annex Wealth Management

PETER G. KOLESKE
Investment Consultant,
North Shore Bank

CAROL MCINERNY
Community Volunteer;
former Domestic Tax Director,
Johnson Controls International, PLC

MADELINE NEVERMANN
Technology Director,
Elevance Health

MOST REV. JAMES SCHUERMAN
Auxiliary Bishop,
Archdiocese of Milwaukee

KEITH B. SIERRA
First Vice President–Financial Advisor,
RBC Wealth Management

DAVID R. STRELITZ
Community Volunteer;
former Senior Vice President
& Regional Manager,
Associated Bank Private Client Services

MICHAEL SWOPE
Director of Wealth
Management Services,
Waukesha State Bank

ANNE C. TRUNZO
Community Volunteer;
Co-Founder,
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MARY ELLEN MARKOWSKI
Emeritus Board Member
and former President,
The Catholic Community Foundation;
Community Volunteer

Staff



JOHN BLICKLE
Controller



JANELLE LUTHER
Administrative Coordinator

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