

PLANNING FROM THE HEART

INSPIRATIONAL STORIES, NEWS AND CHARITABLE GIVING STRATEGIES

ABOUT THE FOUNDATION

- Established on December 24, 1990.
- Became separate entity on July 1, 2012.
- Established relationship with Canterbury Consulting, a firm that's been around since 1988, in November 1999.
- Manages over \$24.4 million for 66 separate endowments (visit www.idahocatholicfoundation.org for list) for the benefit of Catholic schools, parishes, and the Diocese of Boise.
- Achieved 13.2% return on investments for FY 2016-17 which is net of fees. This is 1.6% above our benchmark.
- Adheres to socially responsible Catholic values investment guidelines based on the United States Conference of Catholic Bishops (USCCB).
- Has 13 board members (see page 8 for list) comprised of lay business women and men from all regions of the state and clergy.
- Established three new endowments in FY 2016-17:
 - Our Lady of the Snows, Sun Valley
 - St. Theresa of Little Flower, Orofino
 - Sts. Peter and Paul, Grangeville

MESSAGE FROM ICF CHAIR



DID YOU KNOW THAT THE IDAHO CATHOLIC FOUNDATION IS YOUR FOUNDATION?

Our purpose is to inspire giving and assist donors in order to provide for the long-term needs of the Diocese of Boise. We do this by raising funds, holding and investing assets from the diocese, and related Catholic schools and parishes. The pooling of funds in the Foundation enables our schools and parishes, who share the same values, to achieve economies of scale they could not hope to otherwise achieve, as well as savings in overall brokerage and transfer fees.

Our goal is to establish and help grow endowments for every Catholic parish and school in Idaho. We're here to listen and help determine the type of gift that may be best for you.

The examples of stewardship highlighted in this newsletter are extraordinary. Just as extraordinary, however, are the collective gifts from the faithful that make up each parish, school, and ministry endowment. It's through this widespread generosity that we were able to distribute nearly \$1 million last year to support our Church.

We welcome your thoughts, questions, and prayers.

In gratitude and service,
Alan Winkle
 Board Chairperson



**The Idaho
Catholic
Foundation**

Fostering the Health and Growth
of the Idaho Catholic Church

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BISHOP’S MESSAGE



Dear Brothers and Sisters in Christ, In the Sermon on the Mount, Jesus teaches us to explore the deepest part of ourselves to discover where our true treasure lies. Rarely ever is the treasure of our hearts our personal wealth. Rather the treasures of our hearts are experienced in our God, family members, friends, and our faith community. As we grow in age and wisdom, we invest in relationships that bring the greatest joy into our lives, and in giving of our time, talent, and treasure, we realize that we receive much more than we give.

I am pleased to share financial information about The Idaho Catholic Foundation. The Foundation ensures that we are able to educate and form priests and deacons, care for our retired priests, assist those in need, and support growing vibrant parishes, schools, and diocesan ministries.

In this publication, you will find information about our seminarian endowment, a final report on our diocesan capital campaign, stories about estate planning, and other articles address how you can help support the work of the Church through the Idaho Catholic Foundation.

For almost three years now as your bishop, I have come to know the kindness and generosity of the people of Idaho. I especially want to thank the generous benefactors who share their gifts with our local Church. It is imperative that we continue to build the endowments in the Foundation, so we are better able to bring the Good News of Christ to others.

Thank you for taking some time to read this publication. May you find the stories of stewardship and giving as inspiring as I have. Thank you for your support of the Catholic Church in Idaho through the Idaho Catholic Foundation.

Sincerely yours in Christ,
Most Reverend Peter F. Christensen, D.D.
Bishop of Diocese of Boise

PICK A MINISTRY AND MAKE A FOREVER GIFT

TO YOUR PARISH OR SCHOOL FUND

Many of our parishes and schools have their own endowments with the Foundation to provide a dependable source of support for programs, operations, and ministries. You can pick a fund from the list by visiting www.idahocatholicfoundation.org.

There are over 60 funds that benefit a wide variety of needs throughout the Diocese. These include:

- Funds for formation and education of clergy
- Funds for the use of the Diocese
- Funds for charitable works
- Funds for education
- Parish funds
- Funds to benefit parish schools
- Funds to support youth and campus ministries
- Several other restricted funds.



“BLOWN AWAY BY GENEROSITY”

SEMINARIAN ENDOWMENT FUNDS HELPS MAKE PRIESTHOOD POSSIBLE



The cost to educate a seminarian, now about \$47,000 a year, may appear insurmountable to those considering the priesthood. It shouldn’t be.

No one is ever turned away from becoming a priest due to inability to pay. That is the policy of the Diocese of Boise, made possible because of the generosity of those who support vocations to the priesthood. The gifts received through the annual Idaho Catholic Appeal and our endowed income ensure the constancy to this ministry.

Father John Kucera, a priest ordained in June of 2017, still marvels at those who were willing to support him with their prayers and dollars to make his priesthood possible.

Speaking at a recent event to encourage support for the Seminarian Endowment Fund, Father Kucera said that while he was at Mount Angel Seminary he assumed the diocese was paying his tuition, room and board. “Then someone told me that under this grant, there are people anonymously paying my tuition,” he said.

“I was blown away by people’s generosity,” he said. “When I think of what I can do to repay them, I think of the Psalm: ‘How can I repay the Lord for the great good done for me? I will raise the cup of salvation.’” (Ps 116:12,13)

Raising the cup of salvation is what drew Father Mark Uhlenkott to the priesthood. “I was drawn not so much by one priest or by a particular individual, but I was drawn to what a priest does: Mass and the Eucharist,” he said.

Catholic Extension Society, a national fundraising organization that helps mission dioceses, has offered to match \$1 for every \$2—up to \$25,000—donated to the Seminarian Endowment Fund for the Diocese of Boise through the end of this year. Now is a good time to take advantage of this challenge grant.

“There is a joy and energy in our diocese,” Father Kucera said. “This is an exciting time for us.”

Father Caleb Vogel, one of two vocations directors for the diocese, echoed Father Kucera’s sentiment.

Father Vogel said many more young people are now open to vocations, not like when he was in high school and even in seminary when few expressed interest.

“It’s different now,” Father Vogel said. “There is a general hunger in our culture for the spiritual life because it has been taken away in our culture.” There is a longing within many young people, even though they may not be able to articulate what that longing is, he said. “Don’t be afraid to help them, to encourage them to be open to God’s call on their lives.”

Father Vogel and Father Jerry Funke, also a vocations director, said Catholics should not hesitate to tell a young man that they think he would be a good priest.

There are 12 men now enrolled at either Mount Angel Seminary (near Portland) or Bishop White Seminary (on the Gonzaga campus in Spokane). Two new men enrolled this fall and one anticipates enrolling January, Father Funke said. Deacon Nathan Dial and Deacon Joseph Lustig will be ordained next June.

SEMINARIAN

ENDOWMENT FUND

You can donate to the Seminarian Endowment Fund by sending your check to 1501 S. Federal Way, Suite 400, Boise, ID 83705.

You can also donate online at www.catholicidaho.org. Be sure to select “Seminarian Endowment Fund” in the drop-down menu for “Fund”.

Those who are not able to give at this time may consider making the endowment fund a part of their estate planning.

For more information, contact Margaret Hampton at (208) 350-7539 or mhampton@rcdb.org.

BUILDING THE FUTURE OF THE CHURCH

THROUGH ENDOWMENTS

What is an endowment?

It’s a permanent fund that allows you to donate through the Idaho Catholic Foundation for the benefit of your parish, school, a favorite ministry, or the Diocese of Boise. “Permanent” means your donation is not spent; it is pooled and invested for the purpose of generating earnings in support of the Church. And here is the important part: Those earnings will be given each and every year...forever. Such is the power of giving to an endowment.

Why do the faithful give to an endowment?

- They love their faith and want to build a stronger parish, a stronger Church.
- They want to ensure a healthy future for their parish and the diocesan Church.
- They know that endowment earnings, sent to their parish or chosen ministry, provide a steady stream of income.
- They like the idea that their gift is helping not only today, but forever.
- They like seeing their charitable dollars stretch further and make a bigger impact.
- And, some like the opportunity an endowment offers to establish a legacy in a family or loved one’s name or memory.

DONOR LEGACY STORIES

DEVOTED CATHOLICS LEAVE GIFT FOR THE FUTURE OF THE CHURCH



"I wouldn't have gotten through Jeff's death without my faith," **Mary Tunison of St. Mark's, Boise**, said. She lost her husband Jeff to brain cancer in 2012. They had been married 31 years.

Mary and Jeff both grew up in Boise and graduated from Borah High School. When they were 19 and 20 years old, they married. Although Mary was a cradle Catholic, Jeff didn't come into the Church until 1996.

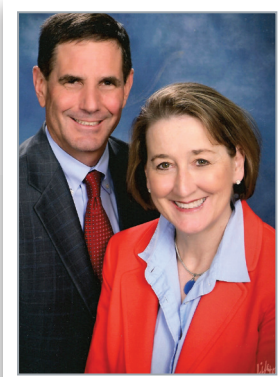
Through his conversion, Mary's faith was renewed, and the two became very active in their parish. Mary volunteered in religious education, and all three of their sons graduated from Bishop Kelly High School.

After years of scraping by, things changed when they decided to commit to tithing. Then in 2000, Jeff founded Title One with other entrepreneurs. He became passionate about giving back to the community, and he and Mary served on their parish's stewardship committee.

Jeff was convinced that the key to success was in relationships, not profits. He modeled his business on the Go Giver by Bob Burg and John David Mann. His motto was a quote from Zig Ziglar:

"You will get all you want out of life, if you help enough people get what they want."

Because the Church has made such a difference in their lives, Mary wanted to help ensure that the Church has a strong foundation of priests to foster the faith. She felt the best way to do this was through a planned gift to the Seminarian Endowment Fund in memory of Jeff. "It's important to put God first," she said.



Rob and Kate Aravich of St. Mary's Parish, Boise, love being involved with their Catholic Faith. They both have served on various boards and foundations for parishes and Catholic organizations, and they continue to contribute as much of their time as they can.

"Stewardship is a part of our faith, a way of life. To be disciples of Christ is to live a life of stewardship," Kate said.

After attending a seminar on estate planning, they discerned that they wanted to continue their stewardship after their death. "Many people don't have wills, and they don't realize that estate planning can be done beyond a will," Rob said. Although creating and changing a will can be expensive, it's free to designate bequests through retirement plans, insurance policies, and investments.

Rob and Kate chose to designate several Catholic charities in their planning, including their parish, Bishop Kelly, the Diocese of Boise, and Catholic Relief Services. "Stewardship is time, talent, and treasure. We have invested a lot of time and talent, and having the Church in our estate planning allows us to invest our treasure, even after we are gone," Rob said.

GIFTS AFTER YOUR LIFETIME

Planned giving is a wonderful way to help support the many important needs of our Catholic community for generations to come. It also provides a statement about the importance the Church played in your life. Here are some ways you can include your Catholic faith in your estate plan, regardless of the size:

A bequest in your will or trust
After providing for your family's needs, consider giving your parish, the diocese, or an endowment fund a certain dollar amount, specific property, or a percentage of your estate. If you already have a will or trust, your attorney can add a simple amendment.

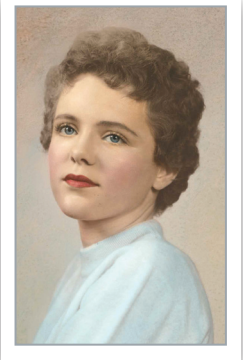
Beneficiary designations
Consider naming your parish, diocese, or an endowment fund as one of the beneficiaries of your retirement (IRA, 401(k), etc.), bank, credit union, or investment accounts. All you have to do is request a beneficiary form from the institution holding the account.

Life insurance
Name your parish, diocese, or an endowment fund as beneficiary of a life insurance policy, or transfer ownership of a paid-up life insurance policy.

Real estate
Designate the Church as beneficiary of real estate through an Idaho Beneficiary Deed. Or gift the property now through a Life Estate and retain the right to live in the home or use the property for your lifetime.

GIFTS can be designated for a particular purpose, undesignated to allow the Church to use the gift for its most pressing need, or permanently endowed to continue the giving forever.

Will you please consider including your parish, diocese, or cherished Catholic ministry in your estate plan? There are a variety of ways to give (more than those listed here) and countless Catholic ministries to support. The Foundation is here to help; all you have to do is ask. Please contact Margaret Hampton in the Development Office at 208-342-1311 or mhampton@rcdb.org.



Dan Zavakil's parents were cash poor farmers who always found a way to give back to their small Catholic parish and to the community. "It was instilled in us that we needed to return to God the gifts of a good, or not so good, crop," Dan said. He said that Jesus's Parable of the Talents in Matthew

25: 14-30 is a constant lesson to him of our responsibility to be good stewards of God's gifts to us, no matter the size.

When Dan's first wife, Marilyn, passed away in 1987, he experienced firsthand the importance of community in the Church. They were in Pocatello at the time, but their daughter Sandra had moved to Boise beforehand. Marilyn's death left Dan feeling alone.

"A few years later, Father Steve Rukavina was assigned to St. Joseph's parish in Pocatello. He had a profound impact on my idea of church. His example of giving back God's gifts (time, talent, and possessions) challenged me to be a more sharing member.

'He always reminded members that God cannot be outdone in giving,'" Dan said.

With Father Rukavina celebrating, Dan married Doris Willsing at St. Mark's in 2004. He and Doris are now parishioners of Holy Apostles. Dan wants the Church to thrive, and he considers it his duty to do everything he can to support the Church, whether physically or financially.

Because of Father Rukavina's example, Dan decided to leave his estate through the Zavakil Revocable Trust to benefit three schools in the Diocese of Boise. This will be given to the diocese after he, his wife, and his daughter pass away.



Father Bill Crowley, Father Arnie Miller, and Father John O'Sullivan, all tirelessly served the Church while they lived. These well-loved priests not only pastored parishes, but they committed their time and talents to numerous charities and missions. After each of them passed away, Catholics of Idaho mourned these holy men who were known for their kindness and loving leadership. But did you know that they continue to serve us even in death?

These three priests gave a 124 years combined, but none of them felt their work would be done after their deaths. By including the Diocese of Boise in their estate planning, their bequests continue to bless the Catholic community of Idaho. Their sacrificial love and service remain examples to us all.

25 ESTATE DOCUMENTS

YOU NEED TO PUT IN ONE PLACE*

- The Essentials**
- Will
 - Letter of Instruction
 - Trust Documents
 - Financial Power of Attorney (POA)

- Marriage and Divorce**
- Marriage License
 - Divorce Papers
 - Military Documents (DD214)

- Health-Care Confidential**
- Personals and Family Medical History
 - Durable Health-Care Power of Attorney
 - Authorization to Release Health-Care Information
 - Living Will
 - Do-Not-Resuscitate Order

- Proof of Ownership**
- Housing, Land and Cemetery Deeds
 - Escrow Mortgage Accounts
 - Proof of Loans Made and Debts Owed
 - Vehicle Titles
 - Stock Certificates, Savings Bonds and Brokerage Accounts
 - Partnership and Corporate Operating Agreements
 - Tax Returns

- Life Insurance and Retirement**
- Life-Insurance Policies
 - Individual Retirement Accounts
 - 401(k) Accounts
 - Pension Documents
 - Annuity Contracts

- Bank Accounts/Social Media**
- List of Bank Accounts
 - List of all User Names and Passwords
 - List of Safe-Deposit Boxes

*From Saabira Chaudhuri's 7/2/2011 article in the *Wall Street Journal*

CATHOLIC CAMPUS MINISTRY BLESSINGS

BY ADRIENNE M. SMITH, CAMPUS MINISTRY DIRECTOR OF DEVELOPMENT

We all know that college is a critical time in the life of a young person. Many of our Idaho students are separated from their families for the very first time, living away from their loved ones and experiencing daily pressures. The interaction with non-believers and members of other faiths allows our children to make daily choices, which ultimately affirm or contradict their Catholic values. As adults, they now have the freedom and flexibility to make choices that will ultimately impact their future in a positive or negative way. Our Catholic Campus Ministry programs continue to be the support and saving grace for young adults facing these tough decisions while attending Boise State University, Idaho State University and the University of Idaho.

We are thankful for your financial support through the diocesan capital campaign that provided grants totaling nearly \$800,000 through June 30, 2017. We are celebrating the great work that was accomplished and is ongoing in an effort to provide for the much-needed building improvements and programmatic upgrades to our three Catholic Campus Ministry centers. As a result, new programs and services are delivering outreach to Catholic young adults and engaging them more fully in the life of the faith community. Ultimately, your prayers and gifts are strengthening their Catholic values and traditions and forming new leaders in our diocese.

Thank you for believing in our youth and reinforcing that our Catholic Church needs to be at the center of campus life, building young adults to become leaders in our Catholic communities. Thank you for making certain that our campus ministry programs are equipped to support and strengthen the faith of Catholic students as well as reach out to those who may be searching for a spiritual home. Thank you for your support and please know we are forming our future, one Catholic student at a time, with your partnership.

A message of thanks from our Campus Ministry Centers:



Here at **St. Augustine's Catholic Student Center**, our Vandal Catholics are so grateful for the funding that we have received from the Idaho Catholic Foundation. Thank you to everyone for your generous support. Like the other Catholic Centers, our FOCUS missionaries are supported by the gifts you have directed to the Capital Campaign. This year we have a team of four missionaries who are helping the college students encounter Christ on campus. Currently they are leading 10 bible studies, with over 40 regular student participants.

With the help of the FOCUS missionaries and the funds allocated from the Idaho Catholic Foundation, we have a weekly Vandal Catholic Encounter night with dinner and a presentation. We have seen an increase in interest in these events,



averaging over 40 participants each week. Additionally, with the generous gifts shared by diocesan donors statewide, St. Augustine's can bring in nationally known presenters like Paul Darrow, has renovated their kitchen and dining hall, and has installed new windows for cooling and heating efficiency.

Rev. Sir Chase Hasenoehrl, STL, KHS and Jennifer Wade, Catholic Student Center Director

Like Vandal Catholics on Facebook: <https://www.facebook.com/vandalcatholics/>



St. John's Catholic Student Center is grateful for the support we have received from the Idaho Catholic Foundation. We have been blessed to have brought on as our spiritual leader, Father Hugh Feiss with the funding we have received through your

generous gifts. Without Father Hugh, we would not be able to celebrate the sacraments, receive spiritual guidance and pastoral care, or eat his delicious home-made bread. Father Hugh's salary is a direct result of the Capital Campaign funds that have been invested into our ministry and we are eternally grateful.

The additional donated funds received through the Idaho Catholic Foundation have helped us restore, update, and repair areas of our facility that had seen better days. For a 50-year-old building, we've been fortunate that this investment in the student center will allow the legacy of campus ministry on the Idaho State University campus to continue.

The investment in staff at St. John's, through the ICF, has allowed the mission of evangelizing the students, staff, and faculty on the Idaho State University campus to flourish. The community



has been greatly impacted by the liturgy, catechesis, events, and outreach, provided by St. John's Catholic Student Center. This fall semester we have six Bible study groups with 26 participants.

We look forward to sharing the many stories of God's goodness with you, our benefactors. Thank you for your generous gift to build the Church in Idaho, especially here at St. John's.

Father Hugh Feiss, Chaplain, and David O'Neill, Coordinator of Campus Ministry

Like Bengal Catholics on Facebook: <https://www.facebook.com/groups/stjohnsisu/>

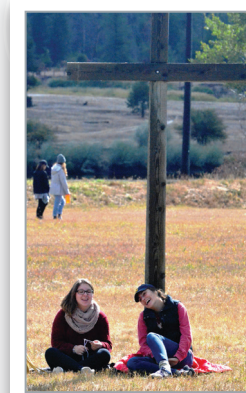


St. Paul Catholic Student Center (Bronco Catholics) are so blessed to receive funding from the Idaho Catholic Foundation. We could not support the many programs at the center without the generosity of our faithful in Idaho.

This year, all of our four FOCUS missionaries are supported by funding granted through the Idaho Catholic Foundation as a result of the first-ever diocesan capital campaign. These young men and women, who themselves are graduates of Catholic campus ministry programs, are a large part of the visibility and success of Bronco Catholic on the BSU campus. They evangelize and recruit students to become active in the center through participation in retreats, Bible study, mission trips, attending daily Mass and weekly adoration.

Your gifts are bearing abundant spiritual fruit. Over 100 students are in a bible study this year. A newly organized men's group called the Frassati Fraternity are helping build young men of faith to become future leaders of our Church in Idaho.

Your generous gifts have also helped make St. Paul's a place where students feel welcome. Your donations also allowed us to purchase office equipment, replace windows and remodel living quarters for our missionaries. The Idaho Catholic



Foundation grants have not only helped us with our building needs, but also enabled St. Paul's to increase its visibility and appeal.

The Bronco Catholic's phenomenal growth over the last three years in student participation and programming has increased the demands on staff and your

donations have supported the grant funds necessary for the hiring of additional staff to further our mission and goals.

Father Tom Lankenau, Chaplain and Campus Minister, and Teresa Nygard, Communications & Volunteer Coordinator

Like Bronco Catholics on Facebook: <https://www.facebook.com/brconcocatholic/>

ABOUT FOCUS

FOCUS is a Catholic collegiate outreach whose mission is to share the hope and joy of the gospel with college and university students. Trained in Church teaching, prayer, sacred Scripture, evangelization and discipleship, FOCUS missionaries encounter students in friendship where they are, inviting them into a personal relationship with Jesus Christ and accompanying them as they pursue lives of virtue and excellence. Through Bible studies, outreach events, mission trips and one-on-one discipleship, missionaries inspire and build up students in the faith, sending them out to spread the good news and to live out the Great Commission: Go, therefore, and make disciples of all nations (Mt. 28:19).

In Fall 2016, FOCUS missionaries began a partnership with the diocese and our student centers on all three campuses.

Why FOCUS?

Only 30% of Americans who were raised Catholic are still practicing – Sherry Weddell, "Forming Intentional Disciples"

The "fastest-growing religious demographic in the U.S." are people who list their faith as "unaffiliated." – The U.S. Religious Landscape Survey (Pew, 2008)

Almost 80% of those who leave the Catholic faith do so by the age of 23. – Faith in Flux: Changes in the Religious Affiliation in the U.S. (Pew, 2009)



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DIOCESAN-WIDE CAMPAIGN

DRAWS TO A CLOSE - FINAL PROGRESS REPORT

The four-year pledge redemption period has drawn to a close for most people who pledged their support of the 2012-2013 diocesan-wide capital campaign, "Building on Our Past, Envisioning Our Future." We are grateful for and wish to thank the 7,051 households who pledged over \$13 million, of which nearly \$12.6 million has been paid. For those who need more time to fulfill their pledge commitments, the Idaho Catholic Foundation will continue to provide reminder notices.

Your gifts have secured and enhanced our beautiful churches, helped pay down debt for some parishes, and generated income from endowments for parish, school, and diocesan ministries and services.

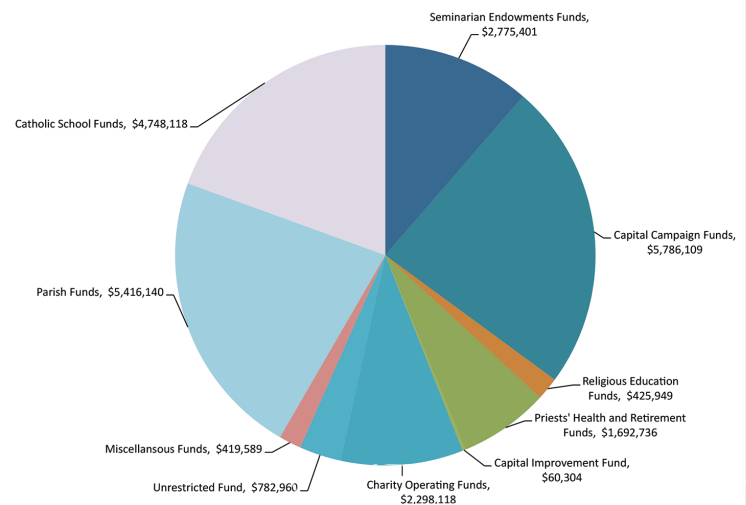
Overall Impact

As of February 28, 2017, over \$12.4 million has been distributed as shown below.

Ongoing Education & Formation of Clergy Endowment.....	\$975,337
Catholic Education & Faith Formation Endowment.....	\$1,229,084
Charitable Works of the Church at Local Parish Endowment	\$609,813
Catholic Charities of Idaho Endowment	\$613,956
Father Donald J. Riffle Endowment for Care of Priests.....	\$696,190
Campus Ministry.....	\$1,673,839
Parishes.....	\$3,636,015
Idaho Catholic Appeal (2013 only).....	\$2,494,476
Campaign Fees	\$500,000

ICF VALUE AS OF 6.30.17

\$24,405,424



ICF MEMBERS

OFFICERS:

- Alan Winkle, *Chairperson*
- Mike Treinen, *Vice-Chairperson*
- Steven T. Busch, *Secretary & Treasurer*
- Lesley A. Bahner, *Past Chair*

BOARD MEMBERS:

- Most Rev. Peter F. Christensen, *Bishop of the Diocese of Boise*
- Kate Aravich, *St. Mary's, Boise*
- Lesley A. Bahner, *St. Joseph's, Sandpoint*
- Stephen T. Busch, *St. Mary's, Moscow*
- Hanley Dawson, *Our Lady of the Snows, Sun Valley*
- Joseph Fehringer, *Holy Apostles, Meridian*
- Travis Kaul, *St. Joseph's, Sandpoint*
- David Petti, *St. John Paul II, Idaho Falls*
- Kathryn Schmid, *St. Edward's, Twin Falls*
- Mike Treinen, *Our Lady of the Rosary, Boise*
- Msgr. Dennis Wassmuth, *Our Lady of the Rosary, Boise*
- Stan Welsh, *Risen Christ, Boise*
- Alan Winkle, *St. John Cathedral, Boise*