

BUILDING A *legacy* OF FAITH



THE FOUNDATION
FOR THE CATHOLIC DIOCESE OF ARLINGTON

200 NORTH GLEBE ROAD, SUITE 811, ARLINGTON, VIRGINIA 22203 • (703) 841-3819

Welcome

Our diocese continues to be blessed with very faithful and generous parishioners. There is a strong history of stewardship and dedication which ensures the spiritual growth of parishes and Diocesan-wide ministries.

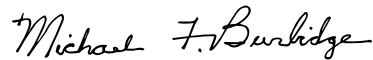
The Foundation for the Catholic Diocese of Arlington was established to help sustain our parishes, schools and ministries so they can continue meeting the needs of our parishioners today and for years to come. Donors to the Foundation can utilize various gift vehicles to fulfill their charitable goals and intentions while helping Catholic organizations prepare for their long-term needs.

I am grateful for our Foundation Board members for their gifts of time, talent and treasure in ensuring the success of *The Foundation for the Catholic Diocese of Arlington*.

May God bless you as you prayerfully consider how you may provide for the future of our parishes and diocese.

Be assured that you and your family remain in my prayers. May Our Lord Jesus bless you and watch over you always.

Sincerely in Christ,



Most Reverend Michael F. Burbidge
Bishop of Arlington

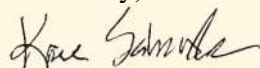


Dear Friends,

On behalf of the Board of Directors, I am pleased to join Bishop Burbidge in offering this brochure for *The Foundation for the Catholic Diocese of Arlington*. This Foundation enables the faithful to help meet the financial needs of our diocese, ministries, parishes and schools in new and exciting ways.

The Foundation offers several easy and meaningful ways to donate or leave estate gifts that will continue to make a critical difference in the growth of our Catholic faith carried out by our laity, parishes, schools and the diocese. I ask you to please use your imagination as you contemplate the impact you wish to make in strengthening our Church. Each member of the Board and staff stand ready to answer your questions as you prayerfully consider your own situation and how *The Foundation* can help you to reach your philanthropic goals. May God bless you.

Sincerely,



Mr. Karl D. Salnoske
Chairperson





The mission of *The Foundation for the Catholic Diocese of Arlington* (Foundation) is to receive and steward charitable gifts in support of the spiritual, educational and social service needs of families and individuals by helping provide for the long-term financial stability of parishes, schools, diocesan ministries and other entities aligned with the principles of the Roman Catholic Church.

In carrying out this mission, *The Foundation* serves as a resource to the diocese, parishes, schools and parishioners.

THE *Vision*

The vision of *The Foundation* is to encourage and foster stewardship by becoming the charity of choice to the 450,000 Catholics in our growing diocese. By offering a flexible suite of charitable vehicles whose assets are safely, securely, and professionally invested with a Catholic conscience, we enable our parishioners to easily support the mission of Christ's Church here in the Diocese of Arlington. Empowered by the love of Christ and in communion with one another, we can further God's Kingdom through our generosity and stewardship.

THE *Mission*



Foundation Overview



- *The Foundation*, a 501(c)(3) public charity, was created in 2011, and operates exclusively for charitable purposes. It is an autonomous organization with the tools, resources, and support to make giving simple and effective.
- *The Foundation* can receive outright gifts to facilitate charitable giving (cash, securities and other assets) and/or may help manage a significant windfall or charitable investment in a given year for distribution over several years.

Leadership

- *The Foundation for the Catholic Diocese of Arlington's* sole member is the Bishop of the Diocese of Arlington. He is advised by a Board of Directors. The Board meets quarterly as is required by established bylaws.
- The Board of Directors shall consist of no fewer than 3 individuals and no more than 12 individuals. Ex officio members of the Board include the Diocesan Finance Officer, Chancellor, and the Moderator of the Curia.
- For a complete list of the current Board Members, please visit *The Foundation* web site at www.arlingtondiocesefoundation.org

Helping Donors and Catholic Organizations

The Foundation offers donors and Catholic organizations a variety of vehicles to create legacies which are uniquely aligned with their beliefs, values, and missions. Parishioners may donate and support specific charities both within and outside of the Catholic Diocese of Arlington. Organizations such as parishes and schools can establish funds or roll over their existing endowments and funds to be managed by **The Foundation**.

Catholic Values Investing and Oversight

The Foundation has the responsibility and authority to invest all donated assets. It follows an investment policy consistent with the Catholic values and practices recommended by the United States Conference of Catholic Bishops (USCCB). All invested assets are managed by professionals and monitored by the Board following the investment policies of **The Foundation**.

Professional Resource

Foundation representatives provide assistance to donors and Catholic organizations that may wish to establish Endowment Funds, Memorial Funds, Scholarship Funds, and Donor Advised Funds (DAF). **The Foundation** can also receive and manage planned giving donations such as securities, bequests, Charitable Gift Annuities (CGA), real estate, and trusts.

Benefits OF THE FOUNDATION



Charitable OPPORTUNITIES...

WHY AN ENDOWMENT FUND?..... "Make an impact that lasts for generations"

Foundation Endowments are donations held for the long-term support of parishes, schools, diocesan ministries and other entities. Endowment principal is held in perpetuity while earnings are available for distribution pursuant to **The Foundation's** spending policy. Distributions of restricted endowments are limited to a donor specified purpose(s) and/or recipient(s). Unrestricted endowment distributions may be used at the discretion of the Board.

Donors are encouraged to contribute to any of our existing Endowment funds or customize their giving by establishing a new fund.

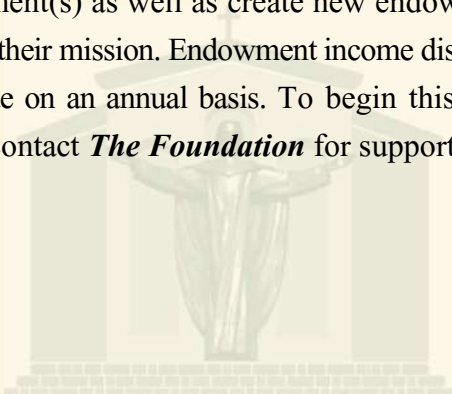
Can we rollover our organization's existing endowment into **The Foundation?**

Yes, if your existing endowment is established and operates as a permanently restricted fund, you may roll it over into the Foundation. Parishes and schools within the Diocese of Arlington may utilize the professional oversight and management of **The Foundation** to help administer their existing endowment(s) as well as create new endowments to support their mission. Endowment income distributions are made on an annual basis. To begin this process, please contact **The Foundation** for support.



WAYS TO GIVE

- Donate to an existing Endowment Fund that meets the charitable needs of you and your family
- Visit www.arlingtondiocesefoundation.org for a list of schools, parishes and programs that receive support through Endowment Funds
- Establish your own Endowment Fund named after your family or in memory of a loved one
- Provide support for a Diocesan ministry, parish, school, or by making a gift to the Unrestricted Endowment Fund of **The Foundation** to help meet the ever-changing needs in our community



“Truly I tell you, whatever you did for one of the least of these brothers and sisters of mine, you did for me.”

Matthew 25:40

WHY A DONOR ADVISED FUND?..... “Streamline your charitable giving”

A Donor Advised Fund (DAF) is a type of giving vehicle that allows donors to combine favorable tax benefits with the flexibility to easily support their favorite charities. DAF’s are an excellent way to both simplify charitable giving and facilitate strategic philanthropic goals. As an alternative to creating a private foundation, DAF donors enjoy administrative convenience, cost savings, and tax advantages.

Contributions to a **Foundation DAF** are irrevocable and therefore immediately tax deductible. These donations can be made when convenient for the donor from a tax or financial planning perspective. Grant recommendations from the DAF to other IRS-qualified public charities can be made at any date in time which satisfies the donor’s charitable mission.

A **Perpetual DAF** is designed to retain principal with earnings available for distribution. A **Flexible DAF** allows for the distribution of both earnings and principal as desired.

Through an agreement with *The Foundation*, DAF donors can make recommendations regarding the DAF name as well as grant recipients, amounts, and timing of distributions. In addition, a DAF enables donors to build an ongoing tradition of family philanthropy.



WAYS TO GIVE

- Establish a new named Donor Advised Fund (DAF) with a minimum gift of \$10,000
- Distribute DAF income to charities of your choice throughout the year

Advantages OF A DONOR ADVISED FUND

Streamline and consolidate your charitable giving

Invest your charitable giving to grow tax-free for future generations

Have the benefit of professional investment management

Foundation investment policies follow Catholic values and policies

Receive a full charitable deduction for your gift without having to make immediate grants to charities

Extend your charitable giving to future generations by creating a fund that turns into a true endowment fund

Receive a tax-efficient, administrative convenient, and lower cost alternative to a private family foundation

MAKE AN

Impact



Bishop Burbidge with newly ordained priests

*Support those studying to be priests with a gift to the
Seminar Education Endowment Fund (SEEF) at
www.arlingtondiocesefoundation.org*



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FOR THE CATHOLIC DIOCESE OF ARLINGTON

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ARLINGTON, VA 22203

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An Immediate Gift...

Checks

Please make checks payable to:

The Foundation for the Catholic Diocese of Arlington

When making contributions to an existing endowment or DAF, please note the fund name on the check memo line (i.e. "Seminar Education Endowment Fund").

Securities

Forms to facilitate the donation of marketable securities are available on our website:

www.arlingtondiocesefoundation.org

Other Property

Non-publicly traded assets, real estate and other assets are accepted on a case by case basis subject to Board approval.

Deferred Giving...

Gifts from Your Will or Trust

Need to preserve your assets during your lifetime? A bequest is the easiest way to make a truly life-changing gift. One paragraph in your Will or Trust is all it takes.

Gifts from a Retirement Plan

Donate assets potentially subject to double taxation and leave more to your family. Name **The Foundation** as a beneficiary of your IRA, 401(k), or other qualified plan.

Charitable Gift Annuity

This vehicle provides the opportunity for donors to receive income payments for life while naming **The Foundation** as the beneficiary of the remainder value when you pass on.

Gifts of Life Insurance

You can designate **The Foundation** as the beneficiary of your life insurance policy.

www.arlingtondiocesefoundation.org