The Motto
“Together, we can make a difference” speaks to how the Catholic United Financial Foundation can impact peoples’ lives. The Foundation creates charitable giving opportunities and responds to the needs of Catholic United Financial’s members and their communities.

Working with Individuals
The Foundation works with individuals by helping them plan and execute their philanthropic goals. Specific resources and services include:

- Estate planning and charitable giving seminars or personal meetings
- Establishing and administering donor-advised funds and endowments

Working with Parishes and Organizations
The Foundation assists Catholic schools and parishes by providing technology grants and chastity and abstinence education program grants. Resources include:

- Estate planning and charitable giving seminars
- Establishing and administering organizational endowments

Working with the Community
The Foundation’s Catholic United Response initiative has a three-pronged strategy for mitigating natural disasters throughout communities in our territory:

- Prepare by planning and educating parishes and members for disasters
- Respond to natural disasters with kits of emergency supplies and volunteers ready to help
- Rebuild by providing the tools and equipment needed to help with cleanup and recovery

Leave a lasting gift to support the causes you value. Contact the Catholic United Financial Foundation or your Sales Representative today. It’s the first step toward making a difference.
Donor Benefits

**Legacy** — your gift will support the Catholic Church and your charitable interests well into the future

**Tax Advantages** — the Foundation is a non-profit charitable institution; your gifts qualify for the maximum deductibility for income, gift and estate tax purposes*

**Ease of Giving** — a single gift can benefit a variety of organizations or causes

**Flexibility** — charitable gifts come in many shapes and sizes. The form and timing of your gift provide the flexibility to meet your tax and estate planning objectives

**Catholic Professionals** — we provide careful stewardship of your donation through adherence to the highest moral, ethical and professional standards in keeping with the Catholic faith

Gift Opportunities

Donors can make a lasting gift using a variety of charitable giving vehicles including:

- Cash
- Gifts with lifetime interest income
- Wills & Life Insurance
- Appreciated Assets

Foundation Funds

The Foundation offers donors a variety of funds to accommodate their diverse interests and concerns:

**Foundation Priorities Fund** — Addressing the most vital needs of charitable causes or organizations in accordance with the Foundation’s mission and priorities, those priorities are technology grants and chastity and abstinence education

**Monsignor Schuler Fund** — A fund providing grants to support the daily needs local seminarians as they study to join the priesthood

**Donor-Advised Funds** — Donors remain involved in the decisions made regarding the use of the proceeds from their gift, or they can state a standing purpose for their fund

Investments

Funds managed by the Foundation are invested only in mutual funds that make investments in companies that do not violate core teachings of the Catholic Church.

*The Catholic United Financial Foundation is not permitted to give tax or legal advice. Consult your personal tax or legal advisor with questions about your specific situation.*