

BOARD NEWS

Re-Elected Officers of the Board of Directors are:

President: John J. Weiler
 Vice-President: John "Jack" Dardis
 Secretary: Michael E. Nolan
 Treasurer: Brian E. Adorno
 Also elected were the following chair persons:
 Finance Committee: James E. LaPorte
 Donor Prospecting Committee: Mason G. Couvillon
 Membership Committee: John J. Devlin
 Public Relations Committee: M. Gordon Stevens
 Planned Giving Committee: Leon "Trey" Reymond
 Long-Range Planning Committee: Steven J. Hubbell

New Members Appointed to the Board of Directors:

Dennis Crawford
 Todd Matherne
 Brian Rotolo
 Barbara Turner Windhorst

- Gordon Stevens has been elected President of Legatus, the organization of Catholic CEOs and managing partners.
- Joe Exnicios was promoted to Senior Executive Vice-President of Whitney National Bank.
- Larry Oney was ordained to the permanent diaconate on January xx, 2009.


Staff News

Brian Berrigan has joined the Catholic Foundation staff. Brian is the new Development Coordinator and will aid in meeting with and speaking to prospective donors. Brian comes to us after working as the President of the National Multiple Sclerosis Society Louisiana Chapter and Director of Development at the Jesuits of New Orleans. Welcome Brian!

The Catholic Foundation
 7887 Walmisley Avenue
 New Orleans, LA 70125-3496
 BOARD OF DIRECTORS
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 Brian E. Adorno
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 Brian P. Berrigan
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FOCUS

April 2009 The Catholic Foundation of the Archdiocese of New Orleans

Estate Planning Are You Thinking About The Future?

Born in 1928, Patrick "Pat" Bryer saw many things. Most of all, he saw the growth, the programs and the needs of the people in the Archdiocese of New Orleans. Pat and his wife Joyce lived a simple, modest life. They went to church, ate at restaurants and enjoyed spending time together. Pat, a retired insurance broker, and Joyce had no children, but celebrated many nieces and nephews.

Pat moved his trusts from another organization to the Catholic Foundation, formed several gift annuities and drafted a will leaving part of his estate to the various ministries in the Archdiocese.

When Pat passed away in 2008, his estate was divided according to his wishes. Monies from the Pat and Joyce Bryer Charitable Remainder Trust were distributed to the entities he directed, including Cancer Crusaders, Ozanam Inn, St. Paul's School in Covington, Second Harvest Food Bank, and the Odyssey House. Also, Food for Families received funds from this Trust. His condo, which he donated to the Catholic Foundation, will be sold by the Foundation and the profit will be put into the Pat and Joyce Bryer Endowment. He also left part of his estate to his nieces, nephews, sister and brother-in-law, and great niece.



WHY HAVE ESTATE PLANS?

Without an estate plan, your estate is divided in accordance to state law. Without estate plans, the state legislature drafts your will, and state law will determine where your wealth and property should go. This may cause monies to go to people you did not want it to go to, and your wishes may not be fulfilled.

What are the advantages to proper estate planning? According to the American Bar Association, by taking the time and necessary effort to plan your estate, you will

- Be able to provide for your immediate family,
- Get your property to your beneficiaries quickly,

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THE CATHOLIC FOUNDATION IS NOW ACCEPTING NOMINATIONS FOR THE POPE JOHN PAUL II AWARD



The candidate should be a Catholic layperson(s) who possesses high moral character and exemplary values, and who has rendered unselfish volunteer service to the institutions and programs of the Archdiocese of New Orleans.

Nomination forms can be downloaded from our website (www.archdiocese-no.org/catholicfoundation) or by calling Allison at 504-310-6981.

The award will be given at The Catholic Foundation's 2009 Annual Dinner on October 29, 2009.

Keeping Students in School: THE STOULIG SCHOLARSHIP FUND

Many years ago, Edward Stoulig decided to put his worldly possessions towards something bigger. He started a trust that would allow under-privileged students to attend Catholic School through tuition support. Edward liked Catholic education and had a strong Catholic faith. He also liked people who worked hard and earned what they needed. After Edward's death in 2005, his brothers, Lawrence and Richard became the trustee's of the trust. Because the trust required plenty of time doing paperwork, taking applications and writing checks, the brothers figured it was time to pass the trust to someone else. Richard and Lawrence learned of the Foundation from their late mother, Alma Lola Sicard Stoulig. They decided to move the trust into the Foundation because of the income tax help, worried of what will happen to the funds in the future, and they wanted the funds to do exactly what Edward wanted—to go to East Jefferson Parish Parochial Schools and the students. "Edward's

intentions will continue to give a Catholic education to underprivileged children," states Lawrence. "We don't need the money. As long as it helps kids learn," adds Richard.

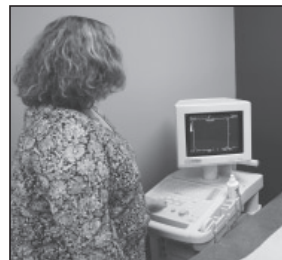
The funds from the Alma Lola Sicard Stoulig and Madelyn Stoulig Scholarship Fund will benefit under-privileged students at Rummel and Chapelle. If you are interested in donating to the Stoulig Scholarship Fund, please contact Peter R. Quirk, Executive Director of the Catholic Foundation at 504-596-3063, pquirk@archdiocese-no.org.



The Late Edward J. Stoulig Jr., creator of the Stoulig Scholarship Fund

WOMEN'S NEW LIFE CENTER: Helping Pregnant Women with Support and Assistance

The Catholic Foundation is pleased to announce that Women's New Life Center has started an endowment for the purpose of helping women with pregnancy. Women's New Life Center offers support and care to women who are facing a pregnancy. To this end, they offer short and long term professional counseling, pregnancy testing, ultrasound, pregnancy care planning, material assistance, and post-abortion counseling; all with an emphasis on life.



If you would like to contribute to the Women's New Life Center Endowment, please contact Peter R. Quirk, Executive Director of The Catholic Foundation at (504)596-3063, or pquirk@archdiocese-no.org.

2008 Distributions

Your planned giving has supported the following ministries:

Young People	\$809,339
Pro-Life	456,719
Families.....	468,550
Elderly.....	208,000
Parish Support.....	469, 226
Evangelization	58,200
Medical Research	121,500
Vocations	75,721
Missions	173,500

Planning - continued from page one

- Plan for possible incapacity (mental or physical, living wills, health care, power of attorney, etc.)
- You will be able to minimize expenses. (The cost of transferring property to beneficiaries can be very high. With proper planning, you can lower these costs.)
- You will be able to choose the executor (trix) for your estate. (This saves money, reduces burdens on others and simplifies the administration of your estate).
- You will be able to ease the strain on family members. (Take the burden off of grieving family, plan funeral arrangements yourself, or limit the expense of your funeral).
- By planning your estate, you can help a favorite cause or charity.
- You can reduce the taxes on your estate! Dollars paid in estate taxes are dollars not given to your heirs.
- You can plan on helping a disabled family member by establishing a special needs trust after you are no longer able to provide for them.
- If you have a small business, your estate plan can provide a smooth transition.

- names, addresses and phone numbers of all possible guardians.
- For finances, list all sources and amounts of principal income; income from dividends and interest, amount, source and beneficiaries of all retirement accounts i.e. IRAs, pensions, Keogh accounts, government benefits and profit sharing plans.
- List amount, source and beneficiaries of all financial assets such as bank accounts, insurance policies, annuities and loans due you.
- List all of your debts, including mortgages, installment loans and business debts, as well as all approximate values of property you own, including real estate, jewelry, furniture, collections, and heirlooms.
- Disclose the location of any safe deposit boxes and inventory the contents.
- Have any documents that may alter your estate plan, including marriage licenses, divorce decrees, recent tax returns, existing wills and trust documents and property deeds.

Having an estate plan can simplify many things for friends and family members, ensuring that your wishes are carried out. Pat Bryer had his estate in order and his succession was quick, easy and exactly as he wished.

Before finalizing your estate plans, you should discuss your wishes with family as well as discuss them with your attorney or financial planner.

(Information supplied by American Bar Association Division for Public Education http://www.abanet.org/publiced/practical/estate_planninginfo.html)

WHAT DO YOU NEED TO PUT TOGETHER A PLAN?

You will need:

- The names, address and birth dates of all persons who you plan to name in your will.
- The name, address and phone number of the person you will name the executor of your will.
- If you have minor children, you will need the

Life Insurance

One of the easiest ways to remember your church parish, school or other ministry is by designating The Catholic Foundation as beneficiary of your life insurance. It does not affect your current cash flow and you can receive income tax benefits. Your church parish, school or other ministry can benefit greatly from a future gift. Simply by adding or changing the beneficiary on your life insurance to The Catholic Foundation, the Foundation will direct your policy to the ministry of your choice, creating a legacy that will aid others for many years to come.

The Catholic Foundation has a new brochure that contains useful information on bequesting a life insurance policy. If you are interested in more information about leaving a legacy through life insurance or to receive a copy of the brochure, please contact Brian Berrigan, 504-596-3083, bberrigan@archdiocese-no.org.

