

The Catholic Foundation delivers the Spring Grant Cycle check to Pastor Fr. Joe Kim and Parish Administrator Luis Estrada at Saint John Vianney Parish.

## Inside



- ▶ Donors' outpouring of generosity makes an impact in response to pandemic needs
- ▶ How the Foundation shifted in response to COVID-19
- ▶ Bequest to the Basilica provides **FOREVER VALUE**

# RESPONDING IN A TIME OF CRISIS



# ► Our Mission

We are committed to strengthening our Catholic community through fund development and grantmaking. It is our vision to be a partner in Catholic philanthropy, matching donor intent with unmet needs, and building **FOREVER VALUE** by acquiring and growing endowed funds. Through prudent investing of endowments, administration of donor advised funds, and education around legacy giving, the Foundation builds long-term support for vital ministries and organizations in our local community and beyond.



## Gather

We gather donations and develop funds for the benefit of the community



## Grow

We grow the funds in our care through prudent and socially responsible investing



## Give

We grant from the funds for the benefit of effective programs and organizations in our community and beyond



Celebrating mass at Saint Julie Billiart Parish in San Jose

# Dear Friends,

At the Foundation we connect generous families with important need. Never have we seen the power of this connection more strongly than in this time of pandemic. The community needed us, and with our donors, we responded.

We have had record-setting grant making this year, both from endowments and Donor Advised Funds.

**We were able to make a \$5,000 grant to every parish in the Diocese of San Jose and the chancery office for pandemic-related needs. And those grants were in addition to our Spring Grant Cycle in which we were able to meet 93% of the need thanks to support from generous donors.**

This is why we encourage institutions to develop endowments and families to establish philanthropy funds – for important support in time of great need.

There are simple and important ways to join us, through endowments for institutions or areas of interest, Family Endowments and Donor Advised Funds. We also have great tools to assist in legacy planning.

When people ask about the changing face of Catholic philanthropy, we answer that it's not changing. This is who we've always been. We will continue supporting important causes today and creating **FOREVER VALUE** for the future of our community and beyond.

We hope you will enjoy the stories – and join us.



**\$5,000**  
per Parish  
Pandemic Relief

**93%**  
of need met through  
Spring Cycle

**Jim Cashman**  
Board Chair,  
The Catholic Community Foundation

**Mary Quilici Aumack**  
CEO,  
The Catholic Community Foundation



ASSETS UNDER MANAGEMENT



2019



61,000,000

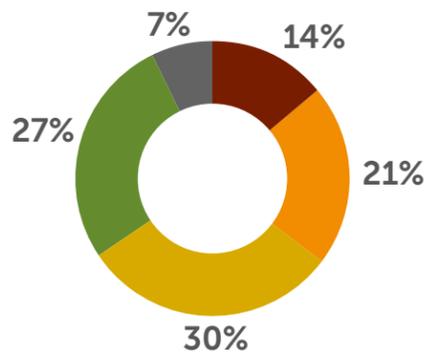


2020



84,000,000

Numbers as of September 30, 2020



PURPOSE	TOTAL
Donor Advised Fund	\$12,000,000
Education	\$18,000,000
Ministry / Includes Family Endowments	\$25,000,000
Parish	\$23,000,000
Vocations	\$6,000,000

A gift of **FOREVER VALUE** for our beloved Cathedral Basilica

We often speak about **FOREVER VALUE**, this idea that through a donation or bequest to an endowment you can remain part of an institution and its ministries **FOREVER**.

They called themselves the “Roman Guards of the Cathedral.” This anonymous husband and wife – parishioners at the Cathedral Basilica of Saint Joseph for many decades – were historians and docents, with deep affection for this jewel of downtown San Jose.

During the Rooted in Faith Capital Campaign of the Diocese 15 years ago, one element was the upkeep and preservation of the Cathedral. As part of the campaign, this couple made a donation along with many others. The Cathedral had among the highest designated giving of all elements of the campaign. This generosity created an endowment at the Foundation that has granted over \$1 million since the first grant in 2009.

Projects supported by these grants have included painting the entire exterior, electrical upgrades, and restoring the stained-glass windows. In the years since their first donation, the “Roman Guards” continued to give annually.

Through the years, the couple had many conversations with the Foundation about their intent to include the Foundation in their estate plan, solely in support of the Cathedral Preservation Endowment. Now they are in heaven, and this beautiful gift from their estate establishes their legacy and keeps their love and spirit among us. Because of their generosity and important planning, the Foundation will make material annual grants in support of this historic and holy place **FOREVER**.

Each of us can provide **FOREVER VALUE** to a parish, school, religious order or ministry as part of our legacy. If you’d like to have a conversation about it, please contact us.

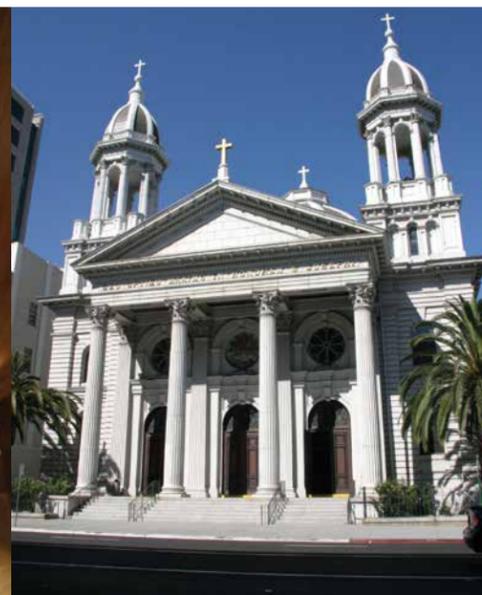
*“The cathedral is more than just the building - it is the center of our diocese and truly a jewel for the city of San Jose. This cathedral shows the best of what we, as Catholics, can be for the greater community. It proves to be a beacon for those in need, both spiritually and physically.”*  
**Joyce Denzel**, Cathedral Docent

Generous Response to Extraordinary Need

When our county went into mandatory shelter-in-place on March 16 and we began to see the first local impacts of the coronavirus, we knew we needed to act. We reached out to our network of supporters and they immediately stepped up with enormous compassion and generosity. **Within a week, donors had responded with nearly \$30,000** in support of our local Catholic Charities, Diocesan schools, and local parishes. Donations continued to pour in over the following months. *Read more about our response to the coronavirus on page 8.*

*“While some days the challenges of addressing the pandemic seem truly overwhelming, when we receive support like yours, it really lifts our spirits.”*

**Greg Kepferle**, CEO of Catholic Charities of Santa Clara County



\$  
**860,000**  
 raised for COVID response



## Our Funds

### FIELD OF INTEREST ENDOWMENTS

Apolonia Andre Fund for Liturgical Music  
 Bishop Patrick J. McGrath Endowment for Ministry  
 Parish Outreach  
 Parish Repair & Refurbishment  
 Parish Stewardship  
 Pastoral Ministry Training & Formation

### DESIGNATED ENDOWMENTS

Catholic Charities  
 Catholic Extension  
 Diaconate Training  
 Fund for Vocations and Religious Ministries  
 Lay Leadership  
 Loaves & Fishes  
 Martha's Kitchen  
 Saint Joseph the Builder (CCF Unrestricted)  
 Seminarian Training  
 Social Justice Education  
 Young Adult Ministry  
 Youth Ministry

### PARISH DESIGNATED ENDOWMENTS

Ann Cretin Endowment for Service to St. Catherine Parish  
 Cathedral Basilica Operations  
 Cathedral Basilica Preservation  
 Catholic Community at Stanford  
 Church of the Transfiguration  
 Glover Endowment for St. Julie's Outreach & Immersion  
 Holy Family Parish  
 Holy Korean Martyrs Parish  
 Holy Spirit Parish  
 Most Holy Trinity Parish  
 Nachazel (Bill & Louise) Memorial Endowment for St. John the Baptist  
 Our Lady of Guadalupe Parish

Our Lady of Refuge Parish  
 Our Lady Star of the Sea Parish  
 Sacred Heart of Jesus Parish  
 Sacred Heart of Saratoga Parish  
 Saint Anthony Parish  
 Saint Christopher Parish  
 Saint Clare Parish  
 Saint Elizabeth Parish  
 Saint Frances Cabrini Parish  
 Saint Francis of Assisi Parish  
 Saint Joseph, Mountain View Parish  
 Saint Joseph of Cupertino Parish  
 Saint John Vianney Parish  
 Saint Julie Billiart Parish  
 Saint Julie Billiart Parish Next Generation  
 Saint Justin Parish  
 Saint Lawrence, the Martyr Parish  
 Saint Leo the Great Parish  
 Saint Lucy Parish  
 Saint Maria Goretti Parish  
 Saint Martin of Tours Parish  
 Saint Martin, Sunnyvale Parish  
 Saint Mary Parish (Gilroy)  
 Saint Mary of the Immaculate Conception Parish  
 Saint Nicholas & Saint William Catholic Parish  
 Saint Simon Parish  
 Saint Thomas Aquinas Parish  
 Saint Thomas of Canterbury Parish  
 San Jose Chinese Catholic Mission

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*"When I think of the word 'community,' I think of people who are not only connected in some way but who also support and care for one another. The Catholic Community Foundation lived up to its name by providing funds for our parish when we really needed them."*

**Fr. Greg Kimm**, Pastor at Saint Joseph Cupertino Parish, on receiving their endowment disbursement early

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### EDUCATION/SCHOOL DESIGNATED ENDOWMENTS

Catholic Education Tuition Assistance  
 George Santich Endowment to Benefit St. Justin School  
 Holy Spirit School  
 Notre Dame Education Fund  
 Sacred Heart Nativity Schools  
 Saint Christopher School  
 Saint Clare School  
 Saint Frances Cabrini School  
 Saint Lucy School  
 Saint Lucy School Scholarship Fund "Voices of Gratitude"  
 Saint Patrick School  
 Saint Simon Parish Endowment for Tuition Assistance

### NON-ENDOWED FUNDS

New Parish Acquisition & Construction

### DONOR ADVISED FUNDS

Anonymous Funds (17)  
 Ed and Kathy Almazol Charitable Fund  
 Anthony Gift Fund  
 Mary & Douglass Aumack Charitable Fund  
 Bakeis Family Charitable Fund  
 Baroni Family Charitable Giving Fund  
 Eric & Maria Bellafronto Charitable Fund  
 Thomas J. Biagini Charitable Fund  
 Ronald & Mary Ellen Cane Family Fund  
 Lucia F. Carrillo Charitable Fund  
 Stephen P. Carter Donor Advised Fund  
 Cashman Family Charitable Fund  
 Alice and Stan Chow Charitable Fund  
 Desbieys Family Fund  
 Rev. Hao Dinh Charitable Fund  
 Daniel E Furtado Donor Advised Fund

Galetto-Dugoni Charitable Fund  
 Genovese Family Charitable Fund  
 Hallagan Huston Family Fund  
 Rev. Saju Joseph Charitable Fund  
 Paul Keller and Aga Goodsell Charitable Fund  
 John & Carolyn Lewis Charitable Fund  
 Masleid Family Fund  
 Irene and Donald McGovern Charitable Fund  
 Milligan Family Fund  
 Mark & Bertha Minnihan Fund  
 George and Jill Montanari Charitable Fund  
 Mooney Family Fund  
 Nicholas G. and JoAnne Moore Family Fund  
 David and Alice Mount Family Fund  
 Lisa and Paul Normandin Charitable Fund  
 James R. O'Brien Charitable Fund  
 Andy & Trish O'Donnell Charitable Fund  
 Michael and Evelyn Oliver Charitable Fund  
 Patrick and Christine O'Malley Donor Fund  
 The Park Family Fund  
 Ronald G. and Sheryl A. Pelzel Fund  
 Richard C. Pfaff Fund  
 Bryan Polster and Anne Yamamoto Charitable Fund  
 Rev. Rick Rodoni Charitable Fund  
 John and Diann Ryan Charitable Fund  
 Sabadin Charitable Fund  
 Schall Family Charitable Fund  
 C. Schmidek Fund  
 John A. Sobrato & Susan Sobrato Fund  
 John M. Sobrato Fund  
 Stone Family Charitable Fund  
 TODKO Donor Advised Fund  
 Triplett Family Donor Advised Fund  
 Votaw Family Fund  
 Waite Family Charitable Fund  
 Lisa and Michael Yutrzecka Make a Difference Fund

▶ For descriptions of our funds and to donate, visit [catholiccf.org/endowments](http://catholiccf.org/endowments)



▶ For more information about Donor Advised Funds, visit [catholiccf.org/donor-advised-funds](http://catholiccf.org/donor-advised-funds)



## Our Investment Strategy

We are committed to designing a strategy that maximizes investment results. Our goal is to grow each fund's total return to provide a steady stream of income that fuels grants, supporting the mission of each beneficiary organization. We follow official guidelines for Catholic Investing and ensure our endowments are managed in compliance with endowment management laws.

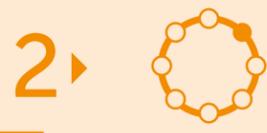
*"The Foundation is deeply committed to impact in our grant making and in our investing."*

**Brad Baron**, Investment Committee Chair

### OUR THREE MAIN OBJECTIVES



1 ► Focus on the long-term returns, providing **FOREVER VALUE** for our beneficiaries



2 ► Pool assets to capitalize on scale and gain access to top managers



3 ► Follow USCCB Guidelines for Catholic Investing to ensure we do not invest in companies that operate counter to our mission

### NEW INVESTMENT PARTNER

Earlier this year the Foundation joined forces with **Jordan Park**, an investment advisory firm in San Francisco.

**Jordan Park** has the responsibility to implement the Investment Strategy set jointly with the Foundation. This partnership adds great value to our overall offerings. The team at Jordan Park is deeply experienced in investing all asset classes. Their commitment to impact investing and community improvement matches our commitment to Catholic investing and providing **FOREVER VALUE** through prudent and effective investment decisions.



► For more information about our investment strategy, visit [catholiccf.org/investment-management](https://catholiccf.org/investment-management)



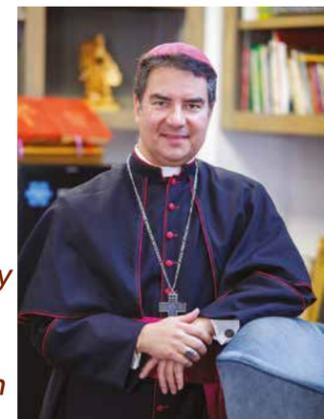
## Response to the Coronavirus

When Santa Clara County went into mandatory quarantine on March 16, 2020, we knew we needed to act. No one yet knew the full extent of how the coronavirus would impact our community.

We knew that our beneficiaries, most of them parishes and Catholic elementary schools, would be in crisis mode and needed a compassionate and generous response from us.

Our nimble nature allowed us to make adjustments in both our Designated Grants and our Spring Grants so that organizations could get much needed "relief."

*"We are grateful to the Catholic Community Foundation and many donors for your support of our parishes and communities that help further the work of the Church here in the Valley of St. Clare. The work of our local Church, the Diocese of San Jose, can only be accomplished through such generosity and partnership."* Bishop Oscar Cantú



### ► DESIGNATED GRANTS

We manage many endowments for institutions and ministries which normally grant about 4% once a year in September.

This year, we knew these beneficiaries would need more support. **We were able to offer a one-time grant of 6% from these endowments in an accelerated timeframe.**

### ► SPRING GRANTS

A lot happened between our original Spring Grant Cycle application deadline on March 16 and our ultimate granting. Once the realities of the pandemic began to set in, we knew our grantees would need support from our grant cycle more than ever before.

In the middle of this process, a donor pledged a **\$500,000 match for the Spring Grant Cycle**. This donation and the many matching gifts greatly amplified our ability to meet the community's needs.

Thanks to the matching donation campaign, **the Foundation was able to give \$5,000 to every parish** in the Diocese of San Jose and the chancery office for pandemic-related needs – no application necessary. On top of that, parishes could apply for grants in our 7 application areas which now had significantly more funding. *Read more about the results of the Spring Grant Cycle on page 10.*



**Fr. Saju Joseph**, Pastor at Saint Martin of Tours Parish, and parish volunteers accept a check for the three grants they received in the Spring Grant Cycle.



**5 Parishes** decided to "pay it forward" and gave the \$5,000 they received to another parish



## Our Grantmaking

### TOTAL GRANTMAKING



### GRANTS BY PURPOSE Amount Granted Oct 19 - Sep 20



\*Includes Family Endowment & Spring Grants

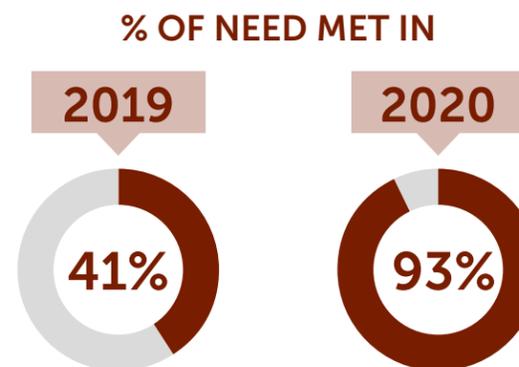
### FIRST CATHOLIC IMPACT SCHOLAR AWARD WINNER

**Ian da Silva** of Bellarmine College Prep received the first **Catholic Impact Scholar Award**. The award is given to a junior who exemplifies the impact that a Catholic high school education has on a student's future goals and view of the world around them. Each local Catholic high school was invited to nominate one junior student to write an essay answering the question, "How has my Catholic education prepared me to contribute to, engage with and improve my community and the world?" The winner received \$5,000 toward his senior year tuition.



## Spring Grant Cycle

The Spring Grant Cycle is the Foundation's annual open application cycle. Local parishes, Catholic elementary schools, and other pre-approved Catholic organizations can submit applications in seven categories.



### 2020 SPRING GRANT CYCLE TOTALS

CATEGORY	# GRANTS	\$ GRANTED
Apolonia Andre Fund for Liturgical Music	15	\$30,000
Clergy Leadership	8	\$22,500
Family Life	12	\$45,000
Lay & Religious Leadership	8	\$35,000
Parish Outreach	26	\$187,000
Parish Stewardship	36	\$186,500
Pastoral Ministry Training and Formation	44	\$196,000
<b>GRAND TOTAL</b>	<b>149</b>	<b>\$702,000</b>

### TWO-YEAR GRANT

This year, the Foundation selected "**Neighbor-to-Neighbor Meals**" as the recipient of the **Two-Year Grant**. This grant secures two years of funding for a program under the Parish Outreach category. The program is a collaboration between Our Lady of Refuge, Christ the King, and Saint Maria Goretti parishes which are providing free, nutritious meals to the community at a weekly "Community Market." Along with hot meals, community members can receive food boxes, medical care, immigration legal services, school supplies for children, and more.

Meals are provided to approximately 400 people at each parish per week. The market is run by parish volunteers, and Our Lady of Refuge Parish has already seen residents helped by the program come back as volunteers to serve others. Catholic Charities of Santa Clara County provides basic support and overall structure for this program as part of their Parish Engagement Program.

To support more programs like this, donate to the Parish Outreach Endowment at [catholiccf.org/parish-outreach](http://catholiccf.org/parish-outreach)





### BISHOP MCGRATH ENDOWMENT FOR MINISTRY

The Bishop Patrick J. McGrath Endowment for Ministry was established to benefit the Diocese of San Jose as part of Bishop McGrath's legacy. The endowment created three new categories for funding which issued their first grants during the 2020 Spring Grant Cycle: Clergy Leadership, Lay & Religious Leadership, and Family Life. Parishes and Diocesan offices applied to fund programs such as:

► **Saint John Vianney's "Divine Renovation - Kickstart Cohorts"** program in which the pastor will go through a six-session training to move the parish "from maintenance to mission."

► **Most Holy Trinity's "Revitalize and Replant Parish Staff"** program which aims to revitalize staff in areas of teamwork, multi-tasking and leadership skills, especially in light of staff changes and challenges faced by the coronavirus.

► **Our Lady of La Vang's "Year of Family Life"** program which offers workshops, retreats, and development sessions for parents and children to gain knowledge on how to grow in faith together and to strengthen the relationship of the family.

► To support more programs like this, donate to the Bishop McGrath Endowment for Ministry at [catholiccf.org/bishop-mcgrath-endowment](http://catholiccf.org/bishop-mcgrath-endowment)



### Donor Advised Fund Granting

A Donor Advised Fund (DAF) is a convenient vehicle for donating to all the organizations you love. Donors make charitable contributions to their fund, receive the immediate tax deduction, and then recommend grants from the fund whenever it make sense for them. The Foundation offers opportunities for giving and education about local program throughout the year.

► For more information about how Donor Advised Funds work, visit [catholiccf.org/donor-advised-funds](http://catholiccf.org/donor-advised-funds)



### GENEROSITY THROUGH DONOR ADVISED FUNDS

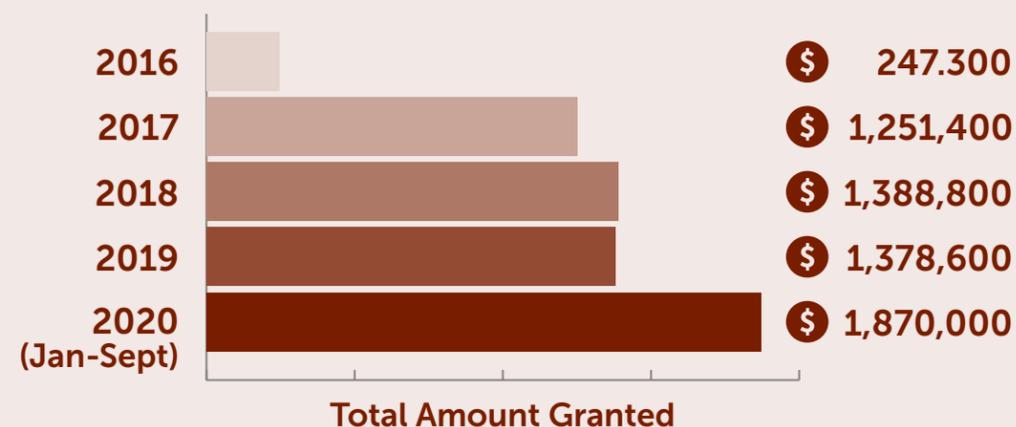
Families can grow their Donor Advised Funds and utilize them by making grants in times of great need or opportunity. Sometimes they are viewed negatively as opportunities to "warehouse money." Such is NOT the case with our generous donor advisors. From October 2019 through September 2020 we granted 24% from these funds, above the national average and well above the minimum granting requirements set for private foundations. Together we learn about needs and opportunities, and we respond.

### Donor Advised Fund Holders Respond in a Time of Crisis

At the Foundation, we are always in conversation with the families that have Donor Advised Funds with us. We can connect them to effective programs and important needs. When the pandemic hit and churches and schools were closed, we immediately went to these families and asked for help.

The beauty of this vehicle is that it allows for the building up of a "philanthropic nest egg," ready to respond in times like these. And people DID respond. In fact, the last five years of granting tell the story of the generosity of our DAF holders during this pandemic.

#### DONOR ADVISED FUND GRANTING BY YEAR



### FINISHING THE YEAR STRONG

DAF granting in only the first 3 quarters of 2020 has surpassed the total DAF granting of 2019. **Since, on average, 51% of our DAF grants are distributed in Q4, the total projected for 2020 looks very encouraging for our community.** Our DAF holders have been very generous during this time of need, and we know their generosity will continue into the end-of-year giving season.

*"The Covid-19 pandemic affected so many lives. We were blessed to have the Catholic Community Foundation to work with, to help grant from our fund to our community in need."*

**George and Jill Montanari**, Donor Advised Fund Holders

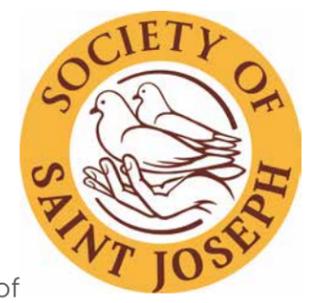
\$  
**768,000**  
contributed by DAF Holders toward the Foundation's COVID response

24%  
DAF Grant Rate





## The Society of Saint Joseph



The **Society of Saint Joseph** is comprised of Catholic men and women who, understanding the call to protect and preserve our faith for future generations, have made a commitment to name their local parish, a Catholic elementary school, the Diocese of San Jose, or any ministry of the Diocese as beneficiary of a gift (of any size) in their wills or trusts, retirement accounts or life insurance policies. We are grateful for these extraordinary gifts that come to the Church after the donors' lifetimes, bearing witness to the faith and ministries they supported and cherished during their life. Their legacy of support makes our Catholic institutions stronger, sustainable and better equipped to reach future generations with our message of faith, hope and love.

### SOCIETY OF SAINT JOSEPH MEMBERS

- |                              |                              |  |
|------------------------------|------------------------------|--|
| Anonymous                    | George and Severa Escobar    | William and Louise <sup>†</sup> Nachazel |
| Robert and Barbara Aquino    | Daniel E. Furtado            | Joe Naylor                               |
| Mary and Douglass Aumack     | Rev. Thierry Geris           | Louis and Margaret Normandin             |
| Kenneth and Mary Baumel      | Martha Giannini              | Paul and Lisa Normandin                  |
| Thomas J. Biagini            | Rick and Terry Giorgetti     | Ronald and Sheryl Pelzel                 |
| Rev. Msgr. J. Patrick Browne | Aga Goodsell and Paul Keller | Robert and Carol Peters                  |
| Poi V. Buenaventura          | Ron Hallagan and Ann Huston  | Linda Poncetta                           |
| David and Erlinda Cadena     | Michael and Corazon Kalt     | Carol Reber                              |
| Lauretta Cappiello           | Cynthia Keene                | Julianne and Frank <sup>†</sup> Sabadin  |
| Arthur and Jean Carmichael   | Chauncey and Yvonne Kendall  | Carolina and German Scipioni             |
| Karonne Carlsen              | Joseph J. and Rita B.        | Richard Sherman                          |
| Irmina Carpio                | Krackeler                    | Leslie C. Smith                          |
| Lucia F. Carrillo            | Gregory Krodel               | John B. and Mary Ann Sorci               |
| Grace Casayuran-Valdez       | Louis and Laura Lencioni     | Stanley Spence                           |
| Brendan J. and Isabel Cassin | John and Carolyn Lewis       | Rev. Msgr. Terrence Sullivan             |
| Albert and Carmen Ching      | Joseph and Rosalie Marty     | Jack and Mary Lou Taylor                 |
| Anthony Cirone               | Leo and Carolyn Mauro        | Rev. Leonard Traverso <sup>†</sup>       |
| Richard and Lillian Clark    | Most Rev. Patrick J. McGrath | Raymond and Susan Triplett               |
| Rose Crimi                   | Rev. Brendan McGuire         | Laurie Vavuris <sup>†</sup>              |
| George P. Delucchi           | Robert and Joan Mibach       | Jess and Katrina Votaw                   |
| Joyce E. Denzel              | Steve and Anne Miligan       | Patrick and Ginny Waite                  |
| Jackson and Patricia Eaves   | George and Jill Montanari    | Nora and Daren Wilkinson                 |

### Have you already named the Catholic Church in your estate plan?

Complete our confidential Legacy Intention Form and we will welcome you into the **Society of Saint Joseph!** This Society is managed by the Catholic Community Foundation in partnership with the Office of Stewardship and Development at the Diocese of San Jose.



► To learn more about the Society and what you can expect as a member, please visit [catholiccf.org/society-of-saint-joseph](https://catholiccf.org/society-of-saint-joseph)

## ► Professional Advisors

The Foundation focuses on building strong relationships with Estate Planning Attorneys, CPAs, Wealth Managers, and other advisors throughout our community. When advisors know about the Foundation and our work, they can recommend our services to clients when they feel it is appropriate. We help educate professional advisors on creative ideas around philanthropy and legacy giving that might not be top-of-mind for them in their everyday work.

*"The Catholic Community Foundation provides a high-tech/high-touch approach when helping families execute their philanthropic strategies, both now and through effective legacy planning."*

**Charles Packer**, Attorney and Shareholder, Hopkins & Carley



### 2020 CARES ACT WEBINAR

This year, in lieu of our normal spring Advisor Breakfast networking and speaker event, we presented a webinar about the philanthropic opportunities in the CARES Act. The Foundation was joined by Nancy Moriarty, Tax partner at Frank, Rimerman+Co., who spoke about the provisions of the legislation that impact philanthropy, and Erik Dryburgh, Principal at Adler & Colvin, who covered the opportunity that endowments present in light of this legislation. The recording of this webinar is available to view at <https://bit.ly/2G7KZLh>

► For more information and resources for professional advisors, visit [catholiccf.org/professional-advisors](https://catholiccf.org/professional-advisors)

### 2020 ADVISOR STEERING COMMITTEE

- |  |   |   |
|--|---|---|
| <b>Brad Baron</b> , RBC Wealth Management                                | <b>Dave Davis</b> , Johanson & Yau                                    | <b>Marc Parkinson</b> , Petrinovich, Pugh and Co. |
| <b>Steve Baroni</b> , Frank, Rimerman + Co., LLP                         | <b>George Delucchi</b> , Delucchi, Hawn & Co., LLP                    | <b>James Petrinovich</b> , Freedom Equity Group   |
| <b>Christina Bedolla</b> , Ferrari, Ottoboni, Caputo & Wunderling LLP    | <b>John Doyle</b> , WealthPLAN, PC                                    | <b>Deborah Kramer Radin</b> , Kramer Radin, LLP   |
| <b>Jerome Bellotti</b> , Jerome A Bellotti & Associates                  | <b>Kathy Fitzpatrick</b> , Fitzpatrick & Tucker, Inc.                 | <b>Brandon Rebboah</b> , Berliner Cohen LLP       |
| <b>Frank Boitano</b> , Abbott, Stringham & Lynch                         | <b>Tom Glascott</b> , Eckley Lombardi Glascott, LLP                   | <b>William Ring</b> , Capital Group               |
| <b>Lisa Intrieri Caputo</b> , Ferrari, Ottoboni, Caputo & Wunderling LLP | <b>Doug Hansen</b> , Deloitte   | <b>David Sacarelos</b> , Seiler LLP               |
| <b>Steve Carter</b> , Abbott, Stringham & Lynch                          | <b>Loreen Huddleston</b> , Loreen E. Huddleston CPA Accountancy Corp. | <b>Brian L. Shetler</b> , Berliner Cohen LLP      |
| <b>James Cashman</b> , Berliner Cohen LLP                                | <b>Larry Kuechler</b> , Armanino, LLP                                 | <b>Leslie Yarnes Sugai</b> , Sugai & Sudweeks     |
| <b>Tom Crotty</b>  | <b>Tim Maximoff</b> , Hoge Fenton Jones & Appel, Inc.                 | <b>Raymond Triplett</b> , Triplett Financial      |
| <b>Jennifer Cunneen</b> , Cunneen Law                                    | <b>Bertha Minnihan</b> , Moss Adams                                   | <b>Vicki Viso</b> , Viso Insurance Services       |
|  | <b>Nancy Moriarty</b> , Frank, Rimerman + Co., LLP                    | <b>Charles Volpe</b> , Berliner Cohen LLP         |
|  | <b>Charles Packer</b> , Hopkins & Carley                              |   |
|  | <b>Jim Parks</b>  |   |

## ► 2020 Board of Directors

James Cashman, *Board Chair*  
Stephen Baroni, *Treasurer*  
Charmaine Warmenhoven, *Secretary*  
Brad Baron  
Tom Crotty

Jennifer Cunneen  
Douglas C. Hansen  
Don McGovern  
Anne Milligan  
Bertha Minnihan

Paul Normandin  
C.S. Park  
John M. Sobrato  
Raymond J. Triplett  
Pat Waite

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## ► Foundation Staff

Mary Quilici Aumack, *Chief Executive Officer*  
Nick Carney, *Endowment & Planned Giving Program Manager*  
Sean Finigan, *Operations Manager*  
Marie Galetto-Dugoni, *Marketing Manager*  
Maya Reyes, *Grants Program Manager*  
Nora Wilkinson, *Administrative Coordinator*

## ► Parish Leader Advisor Group

Fr. Mark Arnzen, *Pastor, Saint Lucy Parish*  
Fr. Joseph Benedict, *Pastor, Cathedral Basilica of Saint Joseph*  
Fr. Chris Bennett, *Pastor, Saint Christopher Parish*  
Fr. Saju Joseph, *Pastor, Saint Martin of Tours Parish*  
Fr. Greg Kimm, *Pastor, Saint Joseph of Cupertino Parish*  
Fr. Justin Le, *Pastor, Saint Maria Goretti Parish*

We recognize that parishes and the Diocese of San Jose are important partners in and beneficiaries of our work. The Foundation meets quarterly with the Parish Leader Advisor Group to brainstorm and discuss our work and partnership.



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