



THE **CATHOLIC**
COMMUNITY FOUNDATION

THE BRIDGE BETWEEN
GENEROUS DONORS AND
EFFECTIVE PROGRAMS

Gather

Grow

Give



What is a Community Foundation?

A community foundation collects donations from community members, invests and stewards those gifts, and distributes grants for the benefit of that community. A community foundation does not do the work of providing services on the ground, but rather establishes and grows funds for the benefit of local programs and organizations. Community foundations are experts in long-term investing, complex gifts, and legacy giving.

Our Mission

Gather | Grow | Give

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.

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

We Gather

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

We Grow

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

We Give

Endowment



An endowment is a permanent fund invested for the benefit of a particular organization or purpose. Annual grants are disbursed using the investment. Endowments grant perpetually, providing **FOREVER VALUE** to the beneficiary.

Endowments can:

- ▶ provide financial security to an organization
- ▶ ensure that certain types of programs have funding every year
- ▶ create a lasting legacy for a family

catholiccf.org/endowments

The Foundation ensures that your contributions receive the highest professional management and fiscal accountability, and that our investments are aligned with our Catholic values. We follow official guidelines for Catholic Investing and ensure our endowments are managed in compliance with endowment management laws.



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 both our mission and the mission of each beneficiary organization.

catholiccf.org/investment-management

Broad and effective grant making is our highest objective. Through grant making, we are able to strengthen our community and allow focus to shift from financial insecurities to remain on Catholic ministry. Our grant making process ensures that funds entrusted to the Foundation are used to address the most important needs of the local community and that the original intentions of the donors are always honored.



Our Grants Support

- ▶ General operational support for parishes and other organizations
- ▶ Outreach programs that help feed the hungry and provide assistance to those in need
- ▶ Catholic ministries, including faith formation programs and vocations
- ▶ Catholic schools' operations and tuition assistance
- ▶ Non-Catholic organizations, including local outreach non-profits, national charities, and donors' alma maters

catholiccf.org/grants

Donor Advised Fund

A Donor Advised Fund (DAF) is a flexible account that allows you to contribute to your fund, receive immediate tax benefits, and then recommend grants to charities all over the United States whenever you choose. It is an excellent tool for simplifying your current giving into one place.

catholiccf.org/donor-advised-funds

Society of Saint Joseph



Have you remembered a local parish, parish school, ministry or the Diocese in your estate plan?

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 beneficiaries of a gift (of any size) in their wills or trusts, retirement accounts or life insurance policies.

These gifts make our Catholic institutions stronger, more sustainable, and better equipped to reach future generations with the message of faith, hope and love.

catholiccf.org/SocietyofSaintJoseph

Legacy Giving

Also known as planned giving, these gifts come after your lifetime. They are part of your estate plan, and the types of assets and giving vehicles vary widely. If carried out with discernment, a legacy gift becomes an expression of your deepest values and stewardship for the next generation.

catholiccf.org/give-later

“We provide the County's largest annual health-fair which prepares the homeless, elderly and vulnerable for flu season. We are very grateful to the Catholic Community Foundation because we need your support in order to offer the level of service we provide for the community.” Cathedral Clinic/John XXIII Health Center, Grant Recipient



▶ Are you a ...

Potential Donor

Donate to one of our existing endowments

catholiccf.org/endowments

Start an endowment or open a Donor Advised Fund to support the organizations you love

Call 408.995.5219 or email info@cfoscc.org

Let us know about a legacy gift you are planning for your parish, parish school, or the Diocese, and we will welcome you into the Society of Saint Joseph

Learn more and download the Legacy Gift Intention Form at catholiccf.org/SocietyofSaintJoseph

Professional Advisor

Estate Planning Attorney, CPA, Wealth Manager, etc.

Learn more about the Foundation's services and how we can meet your clients' needs

catholiccf.org/professional-advisors

Organization Looking to Open a Fund or Apply for a Grant

Find out about the services we can provide for your organization and how to set up a fund

Call 408.995.5219 or email info@catholiccf.org

▶ Contact Us

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