

# FALL 2015 ORANGE CATHOLIC FOUNDATION NEWS FOR DONORS

## EXECUTIVE DIRECTOR'S CORNER



Living in the Diocese of Orange, we have much to be thankful for. Ours is the nation's 10th largest diocese and we are still growing. Many of our parishes have experienced increased Mass attendance, and our diocesan schools have seen an average two-year

growth rate of four percent. Our ministries, such as Restorative Justice, Catholic Charities of Orange County, the Catholic Deaf Community, and the Institute for Pastoral Ministry, continue to increase the number of people they serve. Even the number of seminarians is growing. Truly, we are blessed.

The Orange Catholic Foundation is especially thankful for the prayers and generosity of our many donors. We thank God and pray for all those who helped us make a positive difference in the lives of many by supporting our Pastoral Services Appeal (PSA), our For Christ Forever Capital Campaign, our endowments and other funds, and those who remembered us in their estate plans.

As we approach the end of the 2015 calendar year, I ask that you remember the Orange Catholic Foundation in your prayers and consider a year-end gift. Inside this newsletter is an easy-to-use giving guide. You'll also find information about our Light of Christ Legacy Society.

On behalf of the Board of Directors and staff of the Orange Catholic Foundation, I wish you a wonderful Thanksgiving, blessed Advent Season, Merry Christmas, and a Happy New Year!

Cynthia Bobruk  
President and Executive Director



2015 DIACONATE ORDINATION

## MAKING A DIFFERENCE

As a donor to the Orange Catholic Foundation, you can be assured that your gift makes a difference. Thanks to you and other donors, the Orange Catholic Foundation continues to ensure the viability and success of programs throughout our Diocese of Orange that help the physical, emotional, educational, and spiritual well-being of our Catholic community.

Below are notes of appreciation for the help provided by donor generosity through the Pastoral Services Appeal (PSA), our For Christ Forever Capital Campaign, and support of events like our Conference on Business & Ethics.

*Thank you for providing tuition assistance that is presently helping more than 2,000 children receive a safe, quality, spiritually enriched Catholic education in our Diocese of Orange.*

Greg Dhuyvetter, Superintendent of Schools

*We are extremely grateful for the hope and healing you help us bring to the men, women and children we serve in our jails, to those who are victims of crime and to the families of both.*

Fred LaPuzza, Director, Restorative Justice and Detention Ministry

*Thank you for helping us serve so many of our community's poor and marginalized families with food, emergency shelter, and living essentials.*

Tita Smith, Executive Director, Catholic Charities of Orange

*Thank you for supporting 42 men in 5 different seminaries currently studying for the Diocese of Orange. Your donations help support the cost of tuition, books, and the ongoing formation of our future priests.*

Father John Money Penny, Director of Vocations



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## MISSION STATEMENT

We are an autonomous, pious foundation that works in collaboration with members of our Diocese of Orange to raise, manage, grow and grant funds supporting all aspects of the Catholic faith following each donor's intent. Tax ID #33-0934571.



## LIGHT OF CHRIST LEGACY SOCIETY



The Light of Christ Legacy Society recognizes and honors those who have made provisions for a future legacy gift through a bequest, life insurance, annuity, or trust agreement for the Catholic Church in the Diocese of Orange, including any of our parishes, Catholic schools, ministries or charitable organizations, and those who have created an endowment fund at the Orange Catholic Foundation.

The Orange Catholic Foundation established the Light of Christ Legacy Society in 2012 and had the opportunity to share this program in our Wills and Trusts Week sessions to encourage and expand such planning.

If you would like to learn more about becoming a Light of Christ Legacy Society member, please call us at 714.282.3021. Beginning in 2016, we will be recognizing all Light of Christ Legacy Society members in our annual report.

It has often been said that for Christians, stewardship is a way of life. If that is true, and if, as Christians, we believe that when death occurs "life is changed, not ended," then stewardship is a way beyond this life too.

***You are being enriched in  
every way for all generosity,  
which through us produces  
thanksgiving to God.  
2 Corinthians 9:11***

### HOW TO GIVE

The Orange Catholic Foundation provides many options to support the Catholic causes you care about most.

In addition to the Pastoral Services Appeal promoted through your local parish, the Orange Catholic Foundation manages an extensive list of programs, endowments, and funds in support of Catholic education, diocesan ministries, and our For Christ Forever Capital Campaign.

The next page provides a detailed explanation of gift types, which include brokerage charitable gift accounts, electronic funds transfer, matching gifts, pledges, property, legacy giving, securities, and other methods of giving.

Listed below are the most common types of funds we presently manage:

- Unrestricted Funds - Used to meet the ever-changing needs of the ministries and programs in the Diocese of Orange.
- Parish Endowment Funds - An endowment fund to benefit one of our 62 parishes and centers.
- School Endowment Funds - An endowment fund to benefit one of our 41 Catholic schools in the Diocese of Orange.
- Endowments for Catholic Non-Profit Organizations.
- Named Endowment Funds - An endowment fund in your name or in memory of a loved one to support a specific ministry or purpose.
- Ministry Endowment Funds - An endowment fund for a specific ministry in our diocese.
- Donor Advised Funds - An endowed or non-endowed fund with which the donor has ongoing involvement regarding the use of the gift.
- Special Interest Funds - An endowed or non-endowed fund that supports a specific area of focus.

Please visit our website, [OrangeCatholicFoundation.org](http://OrangeCatholicFoundation.org), for a more comprehensive list of the funds we manage.



# YEAR-END GIVING GUIDE

The chart below provides important information to help you plan for your charitable contributions this year and in the future. Please allow additional time for the Orange Catholic Foundation (OCF) to accept and process more complex gifts before the end of December. For general questions, please call 714.282.3021.

CONTRIBUTION TYPE	PROCESS	TIPS	ESTIMATED TIME	DEADLINE FOR DONORS
Checks	Send a check made payable to the OCF, indicating the purpose of your gift on the memo line. Mail checks: The Orange Catholic Foundation 13280 Chapman Ave, Garden Grove, CA 92840.	Check contributions do not require additional paperwork. To confirm the date your check arrives, you may want to consider requesting a confirmation receipt with your mail.	The Orange Catholic Foundation processes your check based on the day it arrives, but please allow 1 - 2 weeks for processing during the busiest times.	Postmarked by Dec. 31, 2015.
Credit Card Contributions	Contribute online with the "donate now" button on our website, <a href="http://OrangeCatholicFoundation.org">OrangeCatholicFoundation.org</a>		Immediate	Received at the Orange Catholic Foundation by Dec. 31, 2015.
Public Securities, Held Electronically (Stock and Mutual Funds)	Send donation form to your broker with the OCF account number. This form is available online on our website, <a href="http://OrangeCatholicFoundation.org">OrangeCatholicFoundation.org</a> .	Please make sure to notify the OCF in writing of your transfer.	Timing depends on the broker processing the transfer. The value is the average of high and low price on the day transferred.	Received at the Orange Catholic Foundation by Dec. 31, 2015. Allow 8-10 business days for processing year-end gifts.
Public Security Certificates	Gather the following: 1) A gifting letter, 2) an irrevocable stock power, and 3) the stock certificate, and call 714.282.3021 for instructions.	All 3 documents must be received to process the gift. Call us for the account number and instructions at 714.282.3021.	Varies, please contact the Orange Catholic Foundation for more information. Allow 8-10 business days for processing year-end gifts.	Received at the OCF prior to Dec. 31, 2015 with all documentation.
Retirement Assets (IRA)*	Contact your IRA representative to transfer your IRA distribution directly to the Orange Catholic Foundation. This is for donors 70 ½ years or older on the date of transfer.	Check OCF website for an update on the status of the extension of the IRA charitable rollover for 2015 or call 714.282.3021.*	Please allow 3-4 weeks for your transfer.	Received at the Orange Catholic Foundation by Dec. 31, 2015.
Charitable Gift Fund (Vanguard, Fidelity, Schwab, Community Foundation)	Please contact your Charitable Gift Fund broker or visit their website to request a distribution to the Orange Catholic Foundation.	Act today to ensure your grant is received by the Orange Catholic Foundation in a timely way.	Some charitable gift fund managers have a deadline of Friday, December 11 to process a distribution by the end of the calendar year.	Please recommend your grant transfer to the OCF by the beginning of December to ensure your grant is processed by year-end.
Wire Transfers	Please call 714.282.3021. We will then send you the corresponding instructions.	Please make sure to alert the OCF of your wire transfer so we can credit the appropriate fund in a timely manner.	Timing depends on the financial institution processing the transfer. Typically, 3 business days.	Received at the Orange Catholic Foundation by Dec. 31, 2015.
Restricted Stock**	Please contact Executive Director Cindy Bobruk at 714.282.3021 for options.		Timing varies depending on the restrictions.	Please contact the OCF as soon as possible.
Closely-held Stock**	Please contact Executive Director Cindy Bobruk at 714.282.3021 for options.	Per the IRS, closely held stock will need a qualified appraisal within 60 days of the gift.	Timing varies, but typically we can review closely-held stock gifts within 1-2 months.	Please contact the Orange Catholic Foundation as soon as possible.
Real Estate**	Please contact Executive Director Cindy Bobruk at 714.282.3021 to discuss the options and documents needed to review.	Per the IRS, gifts of real estate need a qualified appraisal within 60 days of the gift.	Timing varies, but typically we can review and process real estate gifts in 2-3 months.	Please contact the Orange Catholic Foundation as soon as possible.

The Orange Catholic Foundation is happy to help you with the transfer of complex assets. In fact, it is our specialty. If you are considering a complex asset gift before the end of the year, please call us as soon as possible so that we can help you identify the documentation you will need. We accept complex assets throughout the year. Please call 714.282.3021 for more information.

\*If Congress passes the legislation before year-end, your distribution will be covered. If the provision is not passed, the amount directed to charity will be reportable as income but will also count as a charitable deduction. This is for donors 70 ½ years or older on the date of transfer.

\*\* Subject to review and approval by the Orange Catholic Foundation Board of Directors.

This information is intended to be general in nature. Please discuss your 2015 tax planning with your accountant or other professional advisor.



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CELEBRATE THE 40TH ANNIVERSARY OF OUR DIOCESE OF ORANGE  
AND BE A PART OF CREATING THE NEXT 40!

Endow a better future for the Diocese of Orange  
through the Light of Christ Society



**LIGHT OF CHRIST**  
LEGACY SOCIETY

To join the Light of Christ Legacy Society, visit [OrangeCatholicFoundation.org](http://OrangeCatholicFoundation.org) or call 714.282.3021