

# Welcome to *Family.Philanthropy.Legacy*

*Increasing Your Philanthropic Impact Now and For Future Generations*

A National Catholic Community Foundation Webinar

*Our webinar will begin shortly.*

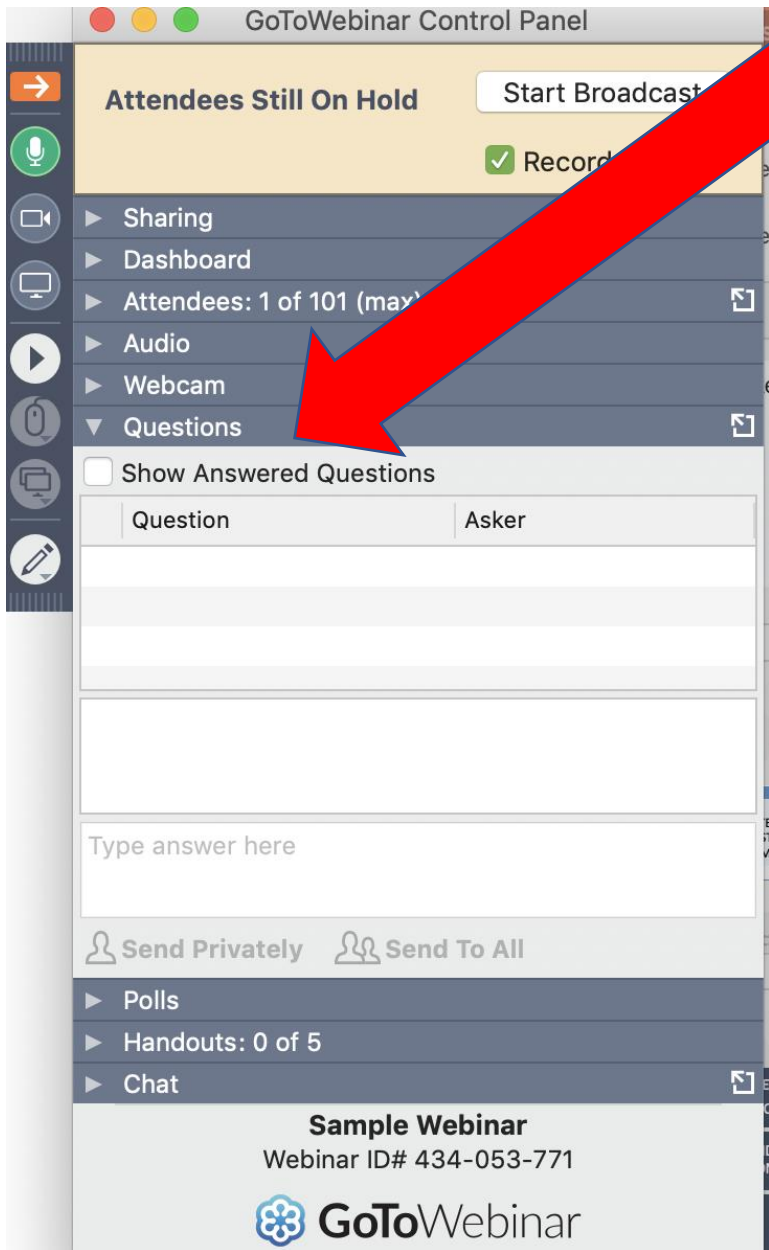


# Welcome!

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 **National Catholic  
Community Foundation**

*"Faith working  
through philanthropy"*



# Housekeeping

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Go To Meeting TOOs  
Q&A In your Menu



All attendees are in  
listen only mode



# Valerie Mullen Pletcher, NCCF Trustee

Valerie is nonprofit innovation specialists with over two decades of experience helping philanthropists and nonprofits fulfill their shared missions. Her expertise in nonprofit fundraising education, marketing, and management have made her a frequent guest speaker and trainer at conferences and workshops; including as a keynote speaker at the 2017 Japan Association for Fundraising conference.

Valerie holds a B.A. from West Chester University and an International Advanced Diploma in Fundraising in addition to certificates in Nonprofit Management and fundraising programs. She is a licensed consultant with the Nonprofit Standards of Excellence, TM, and currently leads the development and launch of a national philanthropy and engagement effort and international program for FOCUS, The Fellowship of Catholic University Students. Valerie serves as an NCCF Trustee, a Director of the Inscape Center for Personal Vocation, is a member of the John Carroll Society and the AFP DC Chapter, and teaches 8<sup>th</sup> grade Confirmation at St. Mary of Sorrows in Northern VA where she lives with her husband, Matthew, and three children, Mary, Maggie and Marlena.

# Webinar Learning Objectives

- Deepen your knowledge of the benefits of creating a Catholic based donor advised fund and how a DAF can advance your personal and family philanthropy now.
- Hear real-time examples of Catholic Families who are building a legacy of family philanthropy.
- Advance your understanding of the impact your personal and family philanthropy can have on recipients in need now, and for generations to come.
- Better understand Catholic investing as part of your legacy and stewardship of gifts.





Dana Robinson



Josephine Everly



Valerie Mullen Pletcher



Bishop Joseph Coffey



Alexia Kelley



James Coffey

Dana Robinson, Chairman of the NCCF Board of Trustees

Josephine Everly, AVP for University Advancement Catholic University of America

Valerie Mullen Pletcher, Senior Director of Philanthropy FOCUS & NCCF Trustee

Most Reverend Auxiliary Bishop Joseph Coffey, Archdiocese for the Military Services, USA

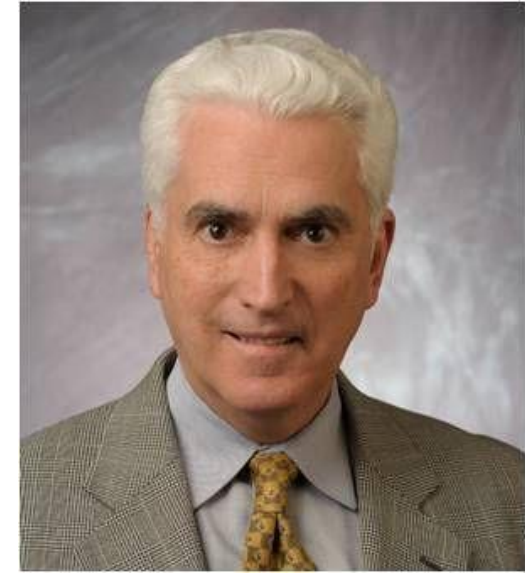
Alexia Kelley, President & CEO, Foundations and Donors Interested in Catholic Activities (FADICA)

James Coffey, President of Advancement for The Papal Foundation & Secretary of the NCCF Board of Trustees

# Dana Robinson

Chairman of the Board of Trustees of the National Catholic Community Foundation.

Mr. Robinson is a retired Senior Vice President of PNC Bank . As a member of the Raskob Foundation for Catholic Activities he is actively engaged in several civic and philanthropic endeavors and serves as board trustee for the John B. Lynch Foundation, Wilmington University, and the American Federation Pueri Cantores.



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# Alexia Kelley

Alexia Kelley serves as the President and CEO of FADICA, where she manages and oversees the organization's strategy, staff and programs. In partnership with the Board and members, she developed the organization's current comprehensive strategic framework which includes a strong focus on member-driven research and initiatives, communications, and the spirituality of Catholic philanthropy. Ms. Kelley served for 10 years at the U.S. Conference of Catholic Bishops' Catholic Campaign for Human Development. Most recently, she served as the Deputy Director of the White House Office of Faith-based and Neighborhood Partnerships, with responsibilities for a diverse engagement public/private partnership portfolio. She also worked previously for Environmental Resources Trust, a nonprofit that focused on market-based solutions to renewable energy promotion and climate change mitigation. Her first job after college was with the Friends Committee on National Legislation (FCNL), the oldest ecumenical advocacy organization in Washington DC. Ms. Kelley co-edited the book *Living the Catholic Social Tradition: Cases and Commentary*, with Dr. Kathleen Maas Weigert, and co-authored *A Nation for All: How the Catholic Vision of the Common Good Can Save America from the Politics of Division*. She earned a B.A. in religion from Haverford College and a Master of Theological Studies from Harvard Divinity School. She lives in Washington DC with her husband and enjoys swimming, reading, traveling, and spending time with family and friends



# Josephine Everly

Josephine Everly is Assistant Vice President for University Advancement Catholic University of America. She is an educator, writer, researcher, and speaker with over 20 years of experience in fund development for Catholic universities, community foundations, medical schools and hospitals. She has served as counsel to bishops, Catholic foundations, nonprofits and other organizations.

Previously, Josephine was Chief Operating Officer and Director of Gift Planning for the Catholic Community Foundation of the Archdiocese of New Orleans, Senior Development Officer of the Greater New Orleans Foundation, and Director of Corporate and Foundation Relations for Xavier University of Louisiana.

Josephine received her MA in Philanthropy and Development from St. Mary's University of Minnesota, where she is adjunct instructor. She is also certified as a Chartered Advisor in Philanthropy. She is founding President of #iGiveCatholic and President of the Association of Fundraising Professionals Greater New Orleans. She is author of Planned Giving Toolkits for Parishes, Schools, and Ministries.

Josephine and her husband, Josiah, now live in Old Town Alexandria and are parents to five children and two terriers, Morty and Melba.



# Donor Advised Funds - Definition

“A philanthropic vehicle established at a public charity (like NCCF). It allows donors to make a charitable contribution, receive an immediate tax benefit, and then recommend grants from the fund over time, generally to other public charities.”

# Benefits to Donors – Ease and Convenience

- Easy to establish
- Can establish with complex gifts – securities, business interests, art, real estate
- Easy to Use – online access for grant recommendations
- Gifts are tax deductible as gift to public charities; earnings are exempt
- Fund advisor receives recognition just as with a direct gift – or can chooses to give anonymously

## Contribute and Deduct



1. The donor contributes to her/his DAF and receives a deduction

## Recommend



2. The donor recommends a grant; the sponsor conducts due diligence

## Give and Celebrate



3. The grant is issued by the sponsor or can be delivered by the donor

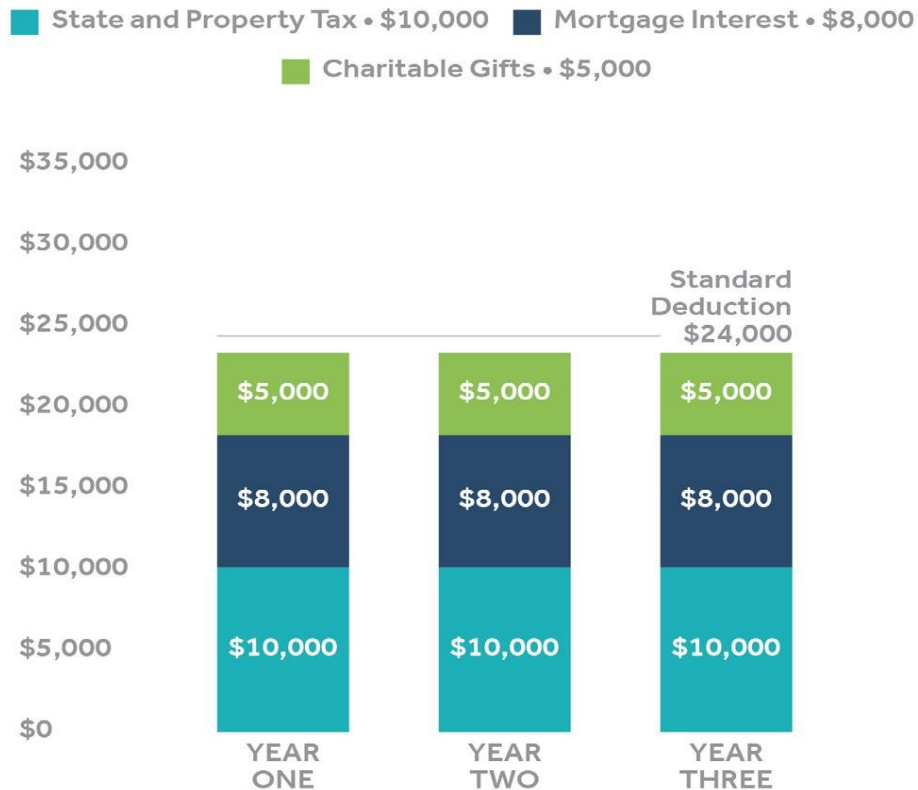
# Benefits to Donors – Financial

Significant cost savings compared with private foundations

	DAF	Private Foundation
Minimum to Establish	As low as \$5,000	Minimum \$5 million*
Deduction limit for cash gifts	60% of AGI	30% of AGI
Deduction limits for gifts of appreciated securities & real estate	30%	20%
Administrative fees	50 to 100 basis points	<b>Up to \$25,000 for start-up and ongoing tax filings</b>
Minimum distribution per year	None	5%
<ul style="list-style-type: none"> <li>➤ Penalties</li> <li>➤ C</li> </ul>	None	30% on undistributed income; add'l 100% if not distributed within 90 days**

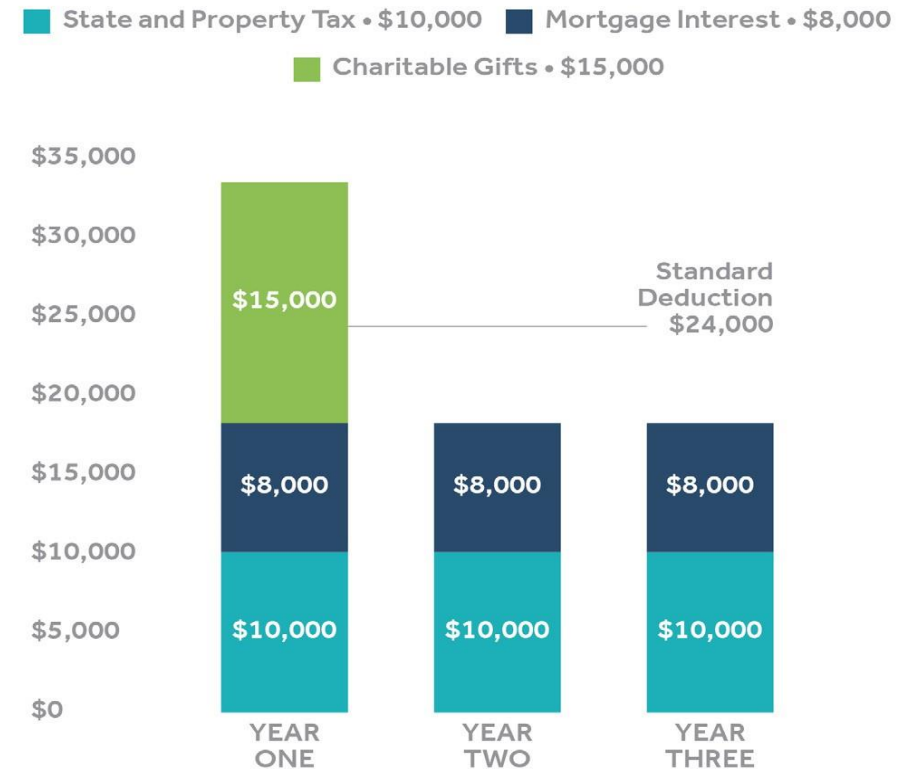
# Smart Giving Strategy: Charitable Bunching

## Scenario 1: Not Bunching



A married couple is \$1,000 short of the standard deduction each year, thus receiving no tax benefit for the deductions.

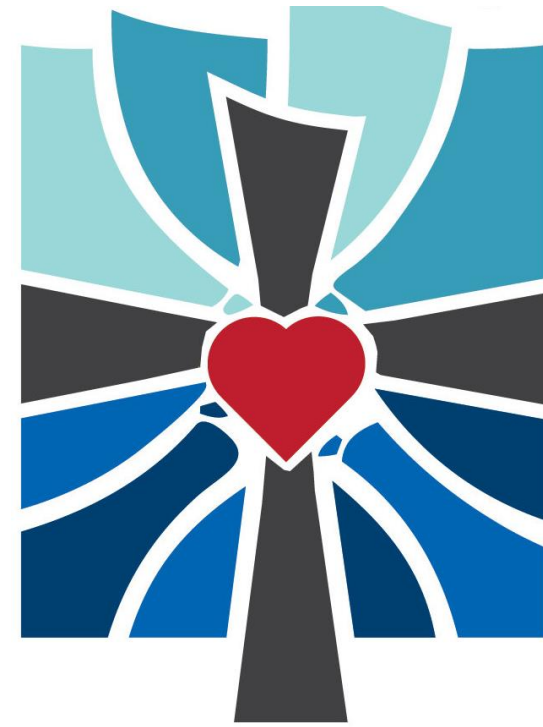
## Scenario 2: Bunching with a Donor Advised Fund



A married couple makes a gift of \$15,000 into a Donor Advised Fund, exceeding the standard deduction and continuing to support ministries over the three year period. The couple has the same total cash outlay of \$69,000, but receives \$81,000 of itemized deductions—an additional \$9,000 of deductions.

# DAFs – a Donor’s Perspective

- Getting organized
- Complex assets
- Succession planning – multiple DAFs may be established
- Donor education/giving analysis
- Being part of a “family” of donors who share your values



# 3 Unique Uses of Donor Advised Funds

1. DAFs in Tandem with Private Foundations
2. Corporate Advised Funds
3. Funds Advised by Religious Orders



# Real Donor Stories

Conversion of a Foundation  
into a Donor Advised Fund

The Salutare Deum  
Foundation (Fund) – Durr  
Construction



# 3 Steps to Establishing Your Donor Advised Fund

Hint – it's really just one step: **Contact the National Catholic Community Foundation!**

But please consider:

- Talk with your family and advisors (CPA, financial advisor, estate planning attorney)
- Discern your focus – What is the Holy Spirit asking of me? What has shaped my soul?
- Think about succession planning – successor advisors, permanent endowment, or distribution of balance



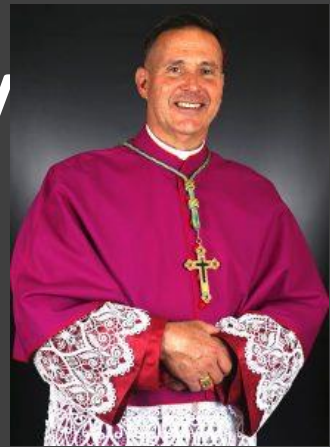
# James Coffey

Is the Vice President of The Papal Foundation, located in Bala Cynwyd, PA (near Philadelphia). Jim holds a Master of Arts in Moral Theology from St. Charles Borromeo Seminary, Overbrook, Religious Studies Division. He is a Trustee of the National Catholic Community Foundation, the College of St. Mary Magdalen, the Majella Foundation and the American Federation of Pueri Cantores student choral organization of the Catholic Church. Since 2003, he has led Papal Foundation pilgrimages to Rome, Sicily, the Amalfi Coast of Italy, and the Holy Land.

Additionally, he has led Papal Foundation mission awareness trips to El Salvador, Guatemala and Mexico. The mission trip includes a visit to the Shrine of Our Lady of Guadalupe and to Girlstown, Chalco, Mexico here the Sisters of Mary educate and care for 3,000 children from the poorest areas of the country. Jim and his wife Felicia are active members of St. Denis Parish in Havertown, PA, where they have raised 5 children.



# Most Reverend Auxiliary Bishop Joseph Coffey



Bishop Joseph L. Coffey, son of the late Dr. William F. X Coffey, M.D., and Roseanita Schubert Coffey, was born in Rochester, MN, on May 31, 1960. He is the fifth of nine children and the proud uncle of 46 nieces and nephews and 12 great nieces and nephews. He was raised in Philadelphia and is a life-long fan of all the Philly sports teams.

Bishop Coffey graduated from La Salle University in 1982 with a double major in English/French which included a year of study at the Sorbonne University in Paris, France. After college, Bishop Coffey worked as a grade school teacher, a ski instructor in Switzerland, and in the automobile industry in Germany and Belgium for five years.

Heeding a call to the priesthood, he attended St. Charles Borromeo Seminary in Philadelphia, PA, and graduated with a Master of Divinity degree (MDiv) and was ordained in 1996 by Anthony Cardinal Bevilacqua. He earned a Master of Arts (MA) in Moral Theology, also from St. Charles Borromeo Seminary in 2000.

While still in seminary, Father Coffey was given permission by Cardinal Bevilacqua to enter the U.S. Navy Chaplain Candidate Program in May of 1992 with the rank of Ensign. He stayed in the Navy Reserve for the next nine years.

Following ordination in 1996, Bishop Coffey was assigned as an Associate Pastor to St. Katherine of Siena parish in Philadelphia, PA. After five years in parish ministry, he was given permission by Cardinal Bevilacqua for full-time active duty as a Navy Chaplain in September of 2001.

Bishop Coffey's duty assignments have included: Combat Assault Battalion, Okinawa, Japan; Division Officer and Command Chaplain on board USS GEORGE WASHINGTON (CVN 73), homeported in Norfolk, VA, with a 6 month deployment to the Arabian Gulf; Command Chaplain at the U.S. Coast Guard Training Center, Cape May, NJ; Marine Air Group 39, Camp Pendleton, CA, an assignment that included a seven-month month deployment to Camp Leatherneck, Helmand Provence, Afghanistan; U.S. Navy Recruiting Command, St. Louis, MO; Command Chaplain on USS RONALD REAGAN (CVN 76), home ported in Yokosuka, Japan, with a six-month deployment to the South Pacific Ocean; and his final assignment as Assistant Chief of Staff for Religious Ministry, Marine Corps Recruit Depot, San Diego, CA.

Bishop Coffey's military awards include the Meritorious Service Medal, the Navy Commendation Medal with 2 gold stars, the Navy Achievement Medal with 2 gold stars, the Navy Sea Service Medal, the National Defense Medal, the War on Terrorism Expeditionary Medal, the War on Terrorism Service Medal, and the NATO Service Medal, 3 Battle E Ribbons.



# Questions and Answers



# Renee Fusick

Director of the National Catholic Community Foundation.

Mrs. Fusick has over 20 years experience in the financial and banking industry. She joined NCCF three years ago and oversees the operations of the organization. Renee lives on the Eastern Shore of Maryland with her husband Dave and six-year old daughter Sophia.



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# Most Reverend Auxiliary Bishop Joseph Coffey



Family.Philanthropy.Legacy 7/21/2020



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# Take Action *Resources*

## **NCCF Contact Information**

Renee Fusick – Director

[rfusick@nccfcommunity.org](mailto:rfusick@nccfcommunity.org)

Edward Robinson – President

[erobinson@nccfcommunity.org](mailto:erobinson@nccfcommunity.org)

[www.nccfcommunity.org](http://www.nccfcommunity.org)

(410) 923-3222

**Read and follow *Advancing the Kingdom* by Dana Robinson**

<https://nccfcommunity.org/advancing-the-kingdom/>

**Read about the NCCF Board of Trustees**

<https://nccfcommunity.org/who-we-are/board-of-trustees/>

# Speaker *Resources*

Dana Robinson

[www.nccfcommunity.org](http://www.nccfcommunity.org)

Valerie Mullen Pletcher

[www.focus.org](http://www.focus.org)

Alexia Kelley

[www.fadica.org](http://www.fadica.org)

Josephine Everly

[www.catholic.edu](http://www.catholic.edu)

James Coffey

[www.thepapalfoundation.org](http://www.thepapalfoundation.org)

Most Reverend Auxiliary Bishop Joseph  
Coffey

[www.milarch.org](http://www.milarch.org)

# NCCF Webinar Series

**Our next webinar will be September 2020.**

**The topic will be Charitable Gift Annuities.**

**To reserve an early seat, please email  
[rfusick@nccfcommunity.org](mailto:rfusick@nccfcommunity.org)**

**We hope you can join us.**



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Thank you for attending!

National Catholic Community Foundation

[www.nccfcommunity.org](http://www.nccfcommunity.org)

(410) 923-3222

1321 Generals Highway, Suite 202

Crownsville, MD 21032

The background is a large, multi-paneled stained glass window. The central panel features a figure with a halo, likely a saint or the Virgin Mary, holding a child. Other panels show various religious scenes, including figures in prayer, a group of people, and a figure in a blue robe. The colors are muted and the overall tone is solemn and reverent.

# With Special Gratitude

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- **All NCCF Trustees, Recipients, Donors**
- **Dana Robinson**, Chairman, National Catholic Community Foundation
- **Edward Robinson**, President, National Catholic Community Foundation
- **Renee L. Fusick**, Director, National Catholic Community Foundation
- **Chad McEachern**, NCCF Trustee, President & CEO, Edmundite Missions
- **Leslie B. Mollsen**, NCCF Trustee, CEO, American City Bureau, Inc.
- **Valerie M. Pletcher**, NCCF Trustee, Senior Director of Philanthropy, FOCUS