



Welcome to
EWTN & Edmundite Missions
Transformational Philanthropy

A National Catholic Community Foundation Webinar

Our webinar will begin shortly.

Welcome!

 **National Catholic
Community Foundation**

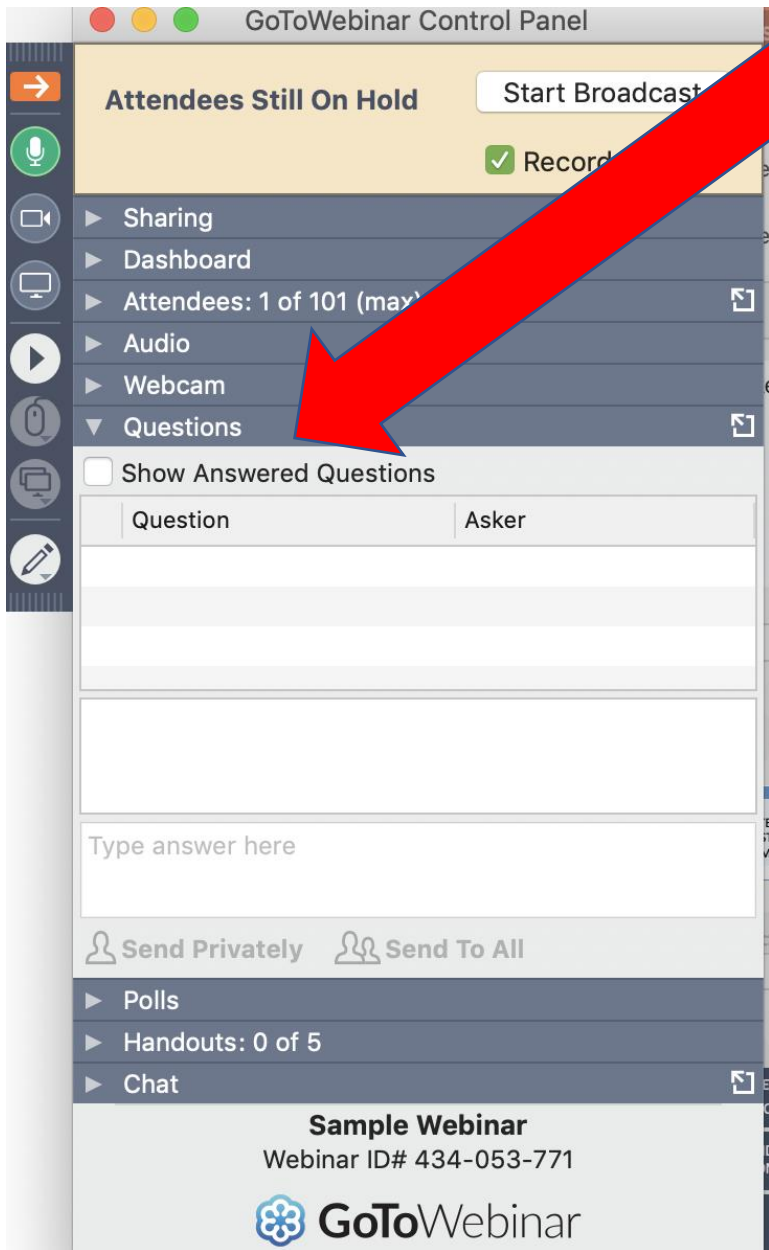
*"Faith working
through philanthropy"*



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 8th grade Confirmation at St. Mary of Sorrows in Northern VA where she lives with her husband, Matthew, and three children, Mary, Maggie and Marlena.



Housekeeping



Go To Meeting TOOs
Q&A In your Menu



All attendees are in
listen only mode

Webinar Learning Objectives

- Learn more about how one international Catholic Media organization helps donors access the benefits of charitable gift annuities.
- Hear from a Nonprofit CEO on how to leverage partners like NCCF in gift processing.
- Receive an overview on how to set up charitable gift annuities and why people choose them.
- Advance your knowledge of an NCCF charitable gift annuity's unique advantages, including limited donor and organization liability, and alignment with Catholic Social Investing standards.





Valerie Mullen Pletcher



Dana Robinson



Julia Boerth



Ryan Flood



Chad McEachern



Renee Fusick

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

Dana Robinson, Chairman of the NCCF Board of Trustees

Julia Boerth, Gift Administration Relationship Manager, PG
Calc

Ryan Flood, Legacy Giving Advisor, EWTN Global Catholic
Network

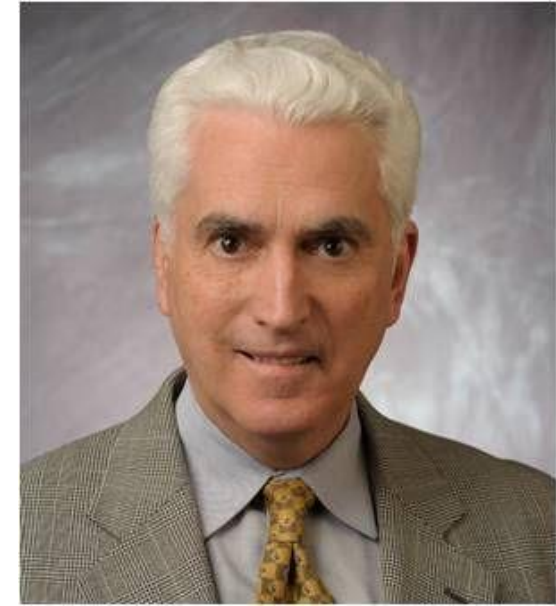
Chad McEachern, President & CEO, Edmundite Missions &
NCCF Trustee

Renee Fusick, Director, NCCF

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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Julia Boerth

Gift Administration Relationship Manager,
PG Calc

Julia supports charities with all aspects of the administration of their planned giving programs. In addition to ensuring accurate and timely gift payments, Julia is responsible for maintaining high quality relationships with her clients, providing technical assistance and consultation to development and finance staff regarding existing and potential charitable gift annuities, charitable remainder trusts, and pooled income funds. In addition to her work in planned giving, Julia has over twenty years of experience serving the public, nonprofit, and philanthropic sectors.



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Charitable Gift Annuities





WHAT is a CGA



- Simple contract
- Donor irrevocably transfers cash or property to charity
- Charity pays fixed amount to one or two annuitants for life
- Payments: immediate or deferred
- Unlimited obligation of charity
- Value at death (“residuum”) goes to the charity



WHO: Profiles of Donors

- General attraction:
 - ✓ Security of fixed payments
 - ✓ Charitable deduction
 - ✓ Tax free income
- Immediate gift annuities:
 - ✓ Mid-70s and older
 - ✓ Increase cash flow
 - ✓ Provide for another individual





WHO: Profiles of Donors

- Deferred gift annuities
 - ✓ Mid-50s to mid-60s
 - ✓ Want supplemental retirement plan
 - ✓ Deduction now, income later
- Flexible deferred gift annuities
 - ✓ Similar profile to DGAs
 - ✓ Not sure when will retire/want income to start





WHY: Charity and Donor Benefit



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**Charity and
Donor Benefit**



WHY: American Council on Gift Annuities

50% Return on Original Gift:

\$10,000 = \$5,000

\$50,000 = \$25,000



HOW: Profiles of Charities

- Planning & Infrastructure
 - ✓ Donor base
 - ✓ Board approval
 - ✓ Patience to support deferred giving
- Commitment for Long-haul
 - ✓ Part of strategy - short-term and long-term fund raising
 - ✓ Staff dedicated to CGAs
 - ✓ On-going marketing
 - ✓ Monitoring





HOW: Policies

- Minimum Age
 - ✓ Average age = 79
 - ✓ Most common = 65
 - ✓ Deferred = 10 years younger than immediate
 - ✓ Two life = both meet minimum
- Contribution Amount
 - ✓ \$10,000 or higher = 72%
 - ✓ \$25,000 or higher = 13%



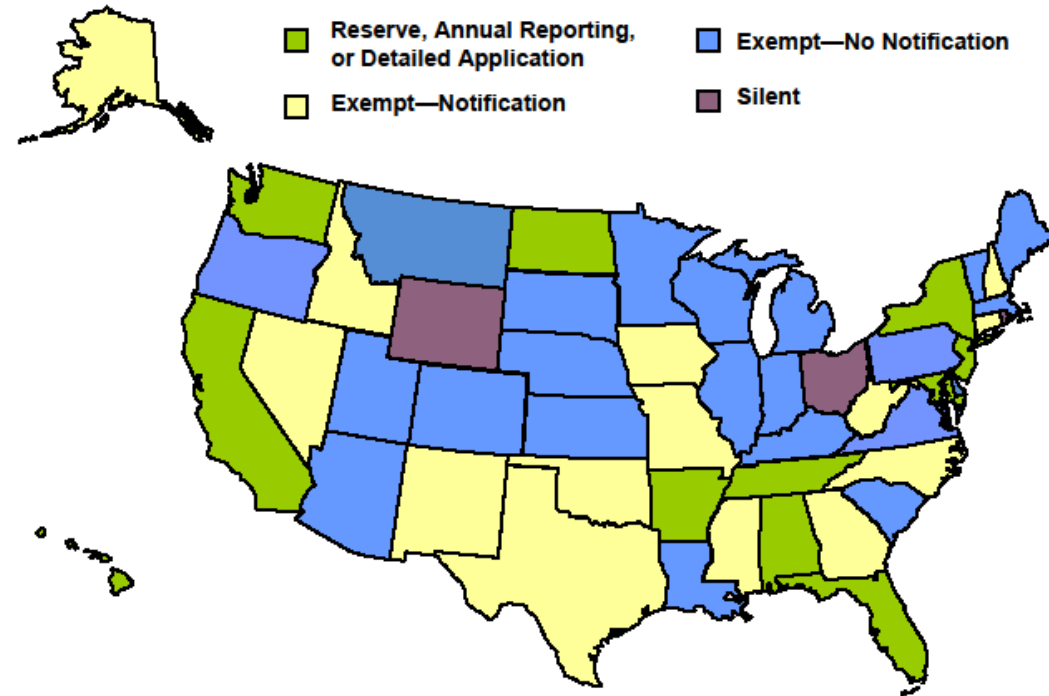
HOW: Investing the Gifts

- ACGA Investment Assumptions
 - ✓ Total return of 3.75%
 - ✓ Expenses 1.0%
 - ✓ Full contribution invested
- Fixed nature and length of obligations
- *Different from your endowment!*
- State investment limitations
- Risk tolerance



WHERE

State regulatory matters





Closing Thoughts



BUT



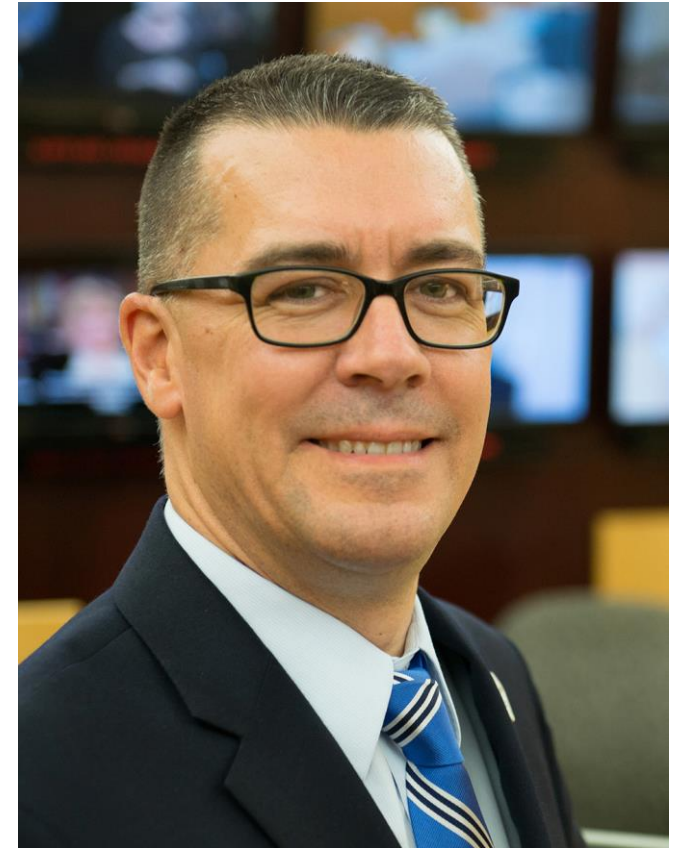
Ryan T. Flood, FCEP

Legacy Giving Advisor, EWTN Global Catholic Network

Ryan Flood, FCEP is the Legacy Giving Advisor for the EWTN Global Catholic Network. He is a qualified and trusted advisor to many EWTN supporters, coordinating all aspects of gift design in the areas of estate planning, real property, donor advised funds, gifts of appreciated securities (stocks and bonds), etc.

As the Legacy Giving Advisor, Ryan assists EWTN Family members and friends who are interested in integrating life-transforming charitable giving strategies into their financial, business or estate plans while amplifying what they preserve for themselves in retirement and for their heirs. Typically, Ryan helps people identify their personal goals for impacting loved ones and their favorite causes (not just EWTN) before developing a tax-savvy/family-friendly plan for donors and their advisors to consider.

For over 20 years and prior to serving EWTN, Ryan worked in the Diocese of Raleigh, North Carolina, and the Diocese of Arlington, Virginia, as the Director of Planned Giving. Ryan has had multiple articles published in Planned Giving Today and is a member of both the National Association of Charitable Gift Planners and the North Carolina Planned Giving Council and is working toward completing his CAP (Chartered Advisor in Philanthropy) designation. Ryan and his wife Mary are parishioners at St. Catherine of Siena Catholic Church and the parents of 10 children.



Today in 2020, EWTN is:

- 11 global television channels broadcasting 24/7 in 5 languages.
- 500 AM/FM Radio Affiliates
- Sirius/XM Satellite Radio
- Shortwave radio reaching around the globe.
- Publishing that produces Mother's writings as well as the writings of many of our EWTN hosts and guests.
- An online presence unmatched in the Catholic church with over 1,000,000 daily visitors.
- Multiple news agencies producing content for all of Catholic media in more than 6 languages.
- The largest circulation print Catholic newspaper in the US, the National Catholic Register, started right in Denver more than 75 years ago.
- A global reach that connects over 190 countries around the globe.
- Over 500 dedicated, mission driven lay employees, in multiple countries, working to fulfill EWTN's mission and vision.



EWTN Global Catholic Network

But that just tells you the what and how of EWTN today. What really matters is “Why?”. Why do we do what do? We do:

- Because there is a priest out in Iowa, who is serving 4 parishes in 4 different towns all by himself. EWTN is his community and refuge to sustain him in his vocation.
- We do this because we need to share with the world the latest news and events from the Vatican.
- We do this because there is a young woman in New York considering an abortion who needs to hear a voice that will guide her to keep her baby.
- We do this because our authentic Catholic programming helps form children in their faith.
- We do this because there is grandmother in California who is alone in a nursing home and can't get to daily mass and needs the solace of our devotional programming.
- We do this because the bishops and priests of Africa need their voice to be heard by the rest of the world.
- We do this so that through the internet, tv, radio and phone apps we can supply the faith throughout Asia where the voice of the church is suppressed.
- We do this because the world desperately needs the Eternal Word, Jesus Christ, and God in his providence has blessed the growth of this Network so that it can reach the entire world.

Chad McEachern

President & CEO, Edmundite Missions & NCCF Trustee



Exciting. Experienced. Engaged. Just a few of the words used by many to describe the ministry of Chad McEachern, President & C.E.O. of the Edmundite Missions. At the Edmundite Missions, Chad provides oversight, vision, and management to all aspects of the organization. He ensures that needed funds are raised and transformative programs are offered to serve those in poverty in the Deep South. Chad works constantly to use his “vocation as an invitation”, inviting others to join the Edmundite Missions in the sacred work of caring for those most in need.

Throughout Chad’s career, he has consistently been nationally recognized as a leader of organizations both within and outside of the Catholic community, including: The Diocese of Madison, The Diocese of Providence, Archdiocese of Boston/National Catholic Bioethics Center (NCBC), Archbishop Williams High School, American Academy of Optometry, American Optometric Foundation, United Service Organization (USO), and many others.

As an innovative leader in the community of Catholic Philanthropy, Chad is a highly sought after author and speaker on the topics of fundraising as a ministry, poverty, and Catholic social service within African-American communities. His leadership, counsel, and service are requested by various boards, both in communities served by the Edmundite Missions and nationally, including: the Wallace Community College Foundation Board (Chairman), his local chapter of the Association of Fundraising Professionals, the City of Selma's Personnel Board, the USCCB’s Sub-Committee Task Force for Cultural Affairs Pertaining to African-American Catholics, the National Catholic Community Foundation (Trustee), and more.

Chad has also received many awards for his life-changing work from local, regional, and national organizations. Most recently, he was given a “Community Hero” award from the Office of Congresswoman Terri Sewell for his work during the pandemic. He is humbled by these awards, and holds in a special place the “Citizen of the Year Award” given to him by the students of Clark Elementary School, a Selma school served by the Missions.

Chad’s service to the Catholic community has strong roots in world-class Catholic education. He received a Bachelor of Arts Degree in Political Science from St. Michael’s College, studied theology at Saint Bonaventure University and Washington Theological Union, and earned a certificate in Catholic Non-Profit Management and Leadership from Notre Dame University.

EWTV & Edmundite Missions 9/29/2020



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EDMUNDITE MISSIONS

A BRIEF OVERVIEW

Founded in 1937, the Edmundite Missions has always sought to meet those in poverty in the Deep South. Starting with the most basic material needs, like food, shelter, and clothing, expanding to more complex needs like education and medical care, and always seeking to turn all of our services into solutions for those in systemic poverty.



THE PILLARS OF SERVICE TO SOLUTIONS



NUTRITION

- 1,000+ meals served daily
- 300+ meals delivered daily to the homebound
- 1,500 Weekend Breakfast Bags provided to Elementary School students
- Over 17 tons of food bags delivered each month



YOUTH PROGRAMS

- Dozens of youth participate in after-school and summer programs through the New Possibilities Youth Program
- The Academy offers programming aimed at higher ACT scores, career exploration, and paid internships



SOCIAL SERVICES

- 120+ households in crisis counseled each week
- 125+ families provided temporary shelter in the face of fires, eviction, and more each month
- 300+ people clothed each month



ECONOMIC EMPOWERMENT

- Provided jobs to those in poverty since 1937, pushing more than 13 million into the local economy today
- Apprenticeship Program has put dozens back into full-time employment
- Partnership with local community college is allowing students to complete their Nursing degree



THE MISSIONS NCCF EXPERIENCE

COST SAVINGS

The cost of registration and record keeping alone has made many smaller organizations abandon CGA programs.

TIME SAVINGS

Hiring someone with the skills to administer a nationwide CGA program in rural Alabama is expensive if even possible.

RESULTS

Our number of annuities, amount of annuities, and the amount in our donor-advised fund continues to grow year over year, all while our investments are managed in accordance with the USCCB Guidelines for Socially Responsible Investing.

LONG-TERM FUNDING

While direct mail meets our daily needs, CGAs provide long-term funding and can help push large projects over the finish line.



A man in a dark suit is pointing with a pen at a whiteboard in a meeting room. He is seen from the side, looking towards the whiteboard. In the foreground, the back of a person's head and shoulders, wearing a light blue shirt, is visible. The whiteboard has a blue banner with text on it. The scene is brightly lit, likely from a window on the left.

A C.E.O.'S PERSPECTIVE

A VIEW FROM THE FRONTLINES

Edmundite Missions
Dr. Michael & Catherine
Community & Recreation C

g up during the Great Depression, Michael Bullock
of self-discipline and hard work. From earliest
tal for cash, worked on a wheat farm, as a railr
a ship welder. At 18, he joined the Air Force,
ough medical school, becoming
m. Though he worked hard fo
wished. Seeing both the great ne
Deep South, Dr. Bullock and hi



Renee Fusick

Director
National Catholic Community Foundation

Mrs. Fusick has over 20 years experience in the financial and banking industry. She started out of college as a leader in the mortgage industry and moved into banking as an Assistant Vice President at Bank of America. Renee received her Bachelor of Arts from the University of Maryland, College Park. She joined NCCF three years ago. Renee lives on the Eastern Shore of Maryland with her husband Dave and six-year old daughter Sophia. The Fusick's are parishioners at St. Christopher's Church in Chester, MD.



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Benefits for an organization to partner with NCCF



Registered in 49 states.



Investments based on USCCB guidelines and invested with other annuity assets to receive economy of scale.



No risk or liability in the gift annuity program.



No cost to set up the gift annuity program.



No administrative work such as contracts, payments to donors, tax forms, etc.



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Chad McEachern, President & CEO, Edmundite Missions &
NCCF Trustee

Renee Fusick, Director, NCCF

Questions and Answers



Closing Prayer
Most Reverend Bishop Joseph Coffey



Take Action *Resources*

NCCF Contact Information

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Edward Robinson – President

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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*

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Resources

- American Council on Gift Annuities: www.acga-web.org provides a wealth of information on CGAs
- 2017 Survey of Charitable Gift Annuities: www.acga-web.org/resources/acga-surveys Learn from other charities about their programs, donors, and more.
- Charitable Gift Annuities: *The Complete Resource Manual* www.pgcalc.com/service/charitable-gift-annuities-complete-resource-manual This definitive resource is vital for new and experienced gift planners.
- 7 Characteristics of a Successful Planned Giving Program <https://marketing.pgcalc.com/7-characteristics-of-successful-planned-giving-program-0>



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Thank you for attending!

National Catholic Community Foundation

www.nccfcommunity.org

(410) 923-3222

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Crownsville, MD 21032

A large, multi-paneled stained glass window serves as the background. The central panel features a figure with a halo, likely the Virgin Mary, holding the Christ Child. Other panels show various religious scenes, including a group of people in prayer and a figure in a white habit. The colors are muted and the overall tone is solemn and reverent.

With Special Gratitude

- **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