

Heritage

News and Ideas for Special Friends Around the Archdiocese



ARCHDIOCESE of OMAHA

Devotion to Catholic Faith Leads to Three Wonderful Gifts to OAEF

One man's devotion to his faith and to Catholic education inspired a son and daughter-in-law as well as a longtime friend, resulting in three endowed scholarships through the Omaha Archdiocesan Educational Foundation, Inc. (OAEF). Their gifts are helping ensure that students who desire a Catholic education have an opportunity to pursue one.

Norman and Verena Mendlik



Norman and Verena Mendlik

Norman Mendlik was an insurance salesman in Dodge, Neb., a father of nine with his wife, Verena, and a devout Catholic. He was the first lay Eucharistic Minister at St. Wenceslaus Catholic Church in Dodge. All of his children attended Catholic school at St. Wenceslaus. He served on numerous

church boards and for 18 years on the Archbishop's Committee for Development.

Because Catholic education was so important to the couple, Norman wanted to help give other

children an opportunity to attend Catholic school even if they could not afford it. To that end, Norman set up an endowment through the OAEF. The Norman and Verena Mendlik Endowment Fund, established in May 2009, not long after Verena died, benefits St. Wenceslaus School in Dodge. Norman passed away in September 2015, but he and Verena's generous donation will touch the lives of many students for years and years.

Paul and Patty Mendlik



Paul and Patty Mendlik

His father's example influenced Paul Mendlik and his wife, Patty, in many ways. Their three children, Jacque, Krista and Ryan, now married, attended St. Pius X/ St. Leo School and Skutt Catholic High School in Omaha.

"We have always been strong believers in Catholic education from day one," said Patty.

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“To me, Catholic education is holistic,” said Paul. “The schools focus on a student’s mind, body and soul and incorporate the whole family, the whole person, in everything they teach.”

Throughout their children’s Catholic education, the couple volunteered countless hours at both schools and at their parish, St. Leo the Great. They chaired committees and fundraisers and said “yes” when they were asked to help.

They also devoted many hours to the archdiocese by chairing the Archbishop’s Dinner for Education in 2007, and have served more than 22 years on the Archbishop’s Committee for Development. Paul has served for more than 13 years as a member of the OAEF/OAPF Board of Trustees.

As chairs of the Archbishop’s Dinner for Education, to commemorate its 30th anniversary, Paul and Patty began an initiative to endow an Administrator of the Year award from past chairs of the dinner. Endowing the award would help ensure that those dedicated to the leadership and oversight of the teaching mission of the Catholic Church would be honored well into the future. Through their efforts, over \$100,000 was raised. The Administrator of the Year receives a \$5,000 grant from the fund.

Through his work on the OAEF, Paul has seen firsthand how important the OAEF is to the future of Catholic education as well as the ongoing need for more scholarships.

That knowledge spurred the couple to endow their own scholarship through the OAEF—the Paul and Patricia Mendlik Family Scholarship Endowment Fund—established in July 2014, to benefit students at V.J. and Angela Skutt Catholic High School in Omaha. “The things we are doing today are aimed at providing for the future of Catholic education,” said Patty.

Paul believes that setting up an endowment through the OAEF is a way to make a difference and provides a good structure to do so. “We see the many challenges schools have to help kids

who can’t pay for a Catholic education. Schools need more endowed money to help,” said Paul.

Paul said that by making a donation to the endowment, a donor could provide a scholarship to one or two students every year and make a difference in their lives. “You have the power to make Catholic education available to someone who couldn’t otherwise afford it,” said Paul. “A lot of people really struggle to send their kids to Catholic school. These scholarships give them an opportunity.”

Walter and Mary Ann Steffensmeier



Walter and Mary Ann Steffensmeier

Norman’s long-time friend, Walter Steffensmeier, was also a champion of Catholic education. His four children, Sue Mandel and Gary, Dean and Don Steffensmeier, also attended St. Wenceslaus School in Dodge. Over the years, Norman shared

with Walter his plans to endow a scholarship for St. Wenceslaus.

So when Walter became ill within months of losing his wife, Mary Ann, he sat down with his kids and communicated his wishes based on a conversation he’d had with his dear friend years before.

When Walter passed away in April 2015, the Steffensmeier children honored their parents’ wishes by setting up the Walter and Mary Ann Steffensmeier Endowment Fund to benefit St. Wenceslaus School in Dodge.

“Dad was a devoted Catholic, and he valued Catholic education,” said daughter, Sue, of Omaha. “He knew there were people who couldn’t afford a Catholic education. He wanted to leave a lasting legacy for the kids at St. Wenceslaus.”

Times Change...Have Your Plans?

Whether you realize it or not, your estate plans may need to be changed. The addition or loss of family members, new or revised tax laws or changes in asset values or in your charitable priorities can, over time, call for revisions to even the most well-considered plans.

Regular updates can be valuable

Schedule periodic estate plan reviews with your attorney and other advisors to ensure your arrangements stay up to date. A will made a number of years ago may not adequately provide for your current circumstances.

For example, the value of a home, stocks, bonds and other assets can change over a long period of ownership. This could call for important changes in your will and other estate plans.

Should your assets decline in value, you will also want to assess plans to make sure your wishes are in line with current conditions.

Coordinate with other plans

Keep in mind your will is often not the sole means for determining who will receive your assets. It is therefore important to understand other ways property can be distributed.

For example, if you own real estate jointly with another person, your will may have little or no effect on who ultimately owns the property.

The same is true for proceeds from life insurance policies and retirement plans. A beneficiary designation completed years ago could determine who receives the benefits, not the terms of your will.

When revising your will, always seek professional advice. Additionally, have your advisors conduct a thorough review of all your assets and the form in which those assets are held.



An Estate Planning Checklist

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|--|------------------------------|-----------------------------|
| I have made a will, living trust or other appropriate estate planning document(s). | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| In these documents, I have provided for all my loved ones as I wish. | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| I have named an executor to handle the settlement of my estate. | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| I have reviewed my beneficiary designations for any life insurance policies and retirement accounts. | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| I have planned for incapacity. | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| I have made plans for the payment of any taxes that may be due. | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| My financial records and other important documents are easily accessible. | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| I have discussed my plans with my spouse and/or other loved ones. | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| I have included gifts to the charitable organizations I wish to remember. | Yes <input type="checkbox"/> | No <input type="checkbox"/> |

Devotion to Catholic Faith... *continued from Page 2*

The contributions made to the OAEF by Norman and Verena Mendlik, Paul and Patty Mendlik and Walter and Mary Ann Steffensmeier

will make a difference for years to come. With their help, a student's desire to pursue a Catholic education has become the opportunity to receive one.

About the OAEF

The Omaha Archdiocesan Educational Foundation, Inc. (OAEF) was established in 1975 to provide long-range supplementary funding for the continuation and development of Catholic education within the archdiocese. In 1995, Archbishop Elden Francis Curtiss expanded the investment options for parish endowments by initiating the Omaha Archdiocesan Parish Foundation, Inc. (OAPF). This fund was established at the request of pastors who wished to have the advantage of professional investment management.

For decades, tuition assistance grants have been made accessible to countless people throughout the archdiocese due to the generosity of families and individuals. The Foundation is a vehicle that receives gifts to be held in endowment. Donors may make specific or general gifts to the Foundation. These endowments support Catholic programs operating under the approval of the Archdiocese of Omaha. Donors may participate with cash gifts, gifts of securities, gifts of property, life insurance, annuities and other approved vehicles. Gifts to the Foundation are deductible and the income is exempt from income taxes under section 501(c)(3) of the Internal Revenue Code.

To learn more about making a gift to the Foundation, please contact Ron Worthington, Stewardship and Development Office, at (402) 557-5650 or rcworthington@archomaha.org

The purpose of this publication is to provide general gift, estate, and financial planning information. It is not intended as legal, accounting, or other professional advice. For assistance in planning charitable gifts with tax and other financial implications, the services of appropriate advisors should be obtained. Consult an attorney for advice if your plans require revision of a will or other legal document. Tax deductions vary based on applicable federal discount rates, which can change on a monthly basis. Some opportunities may not be available in all states. ©MMXV RFSCO, Inc. All Rights Reserved.NBEQ-15

The Heritage Society

The Heritage Society is a special way to recognize individuals who have made provisions in their estate plans for the Archdiocese of Omaha and its parishes, schools and other Catholic ministries. The Heritage Society offers a unique opportunity for those who want their giving to transcend their own lifetimes. For information about membership, please call Ron Worthington, Estate Planning Officer, in the Stewardship & Development Office at (402) 557-5650, ext. 1901.



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