



Legacies

LIVING LEGACY CIRCLE NEWS

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Despite Distance, Couple Still Devoted to Omaha's Holy Name School

During their 47 years of marriage, Kathleen and Tom Cullinan and their three children have lived in several places – Lincoln, Omaha, Houston and Columbia, Maryland – but despite the distance, their ties to Holy Name School are as close as ever. Although they now live in Corpus Christi, Texas, Holy Name and the Archdiocese of Omaha remain front and center in their hearts.



work has focused on estate planning and complex gifts, so his expertise guided their decisions. “Every year we would sit down and thoughtfully evaluate where we wanted to give our charitable donations, and Holy Name School was always on that list,” she said.

The connection grew when the couple moved back to Omaha from Maryland in 2000. She said the first thing they did was to go to one its famed fish fries. “No one in my family had been to a fish fry. We talked about how much fun it was, and suddenly my siblings started going. Their families started going, and my mom also started going!” Kathleen recalled.

They were friends with development staff from Holy Name, including Cele Tonn and Colleen Peterson. Kathleen served on the development committee for three years and then eventually co-chaired Harvest, the annual school fundraiser. “You just get pulled in more and more, and every time, it was so comfortable,” said Kathleen. “It has a lot to do with the people involved from the past and present. It’s an emotional connection, too.”

A History That Binds

A 1970 graduate, Kathleen started at Holy Name School in kindergarten. When she received a scholarship to the high school (since closed), she vowed that someday she would repay the gift. “Over the years, we made donations to Holy Name when they called for their annual appeal. It would always be a student calling so I would give,” said Kathleen.

Kathleen said Tom’s expanding work in philanthropy became a turning point to make their giving more intentional. With more than 30 years’ experience, his

Sharing Their Gifts

During their time in Omaha, the couple immersed themselves in their careers and volunteering. Kathleen taught fifth and sixth grade at St. Robert Bellarmine for 16 years. They devoted their time by helping at their various parishes throughout the years – St. Robert Bellarmine, St. Charles Borromeo and Holy Name – as well as the archdiocese. They were founding members of the Heritage Society (now the Living Legacy Circle) and were members of the Archbishop’s Committee for Development. Tom’s expertise in charitable giving was invaluable, and he served as a member of the

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Legacy Planning Committee. In addition, he conducted a study of the archdiocese's stewardship and development initiatives where he recommended areas for improvement that are still in place today. He also delivered stewardship seminars for its development professionals, managed St. Robert's stewardship program, and was a pro bono advisor to the Servants of Mary.

Tom continued building his consulting business, serving as editor of Planned Giving Today, and he was the second director of the National Planned Giving Institute at The College of William and Mary. Today, Tom is a senior vice president for Thompson and Associates located in Brentwood, Tennessee.

Thoughtful Planning

As the years went by, it became clear to them that their "first love" as Tom called it, was and would continue to be Holy Name. In 2007 the couple revised their estate plans and named several nonprofits as beneficiaries for an end-of-life gift. Holy Name School was prominent on that list. The couple entered into a charitable gift agreement with the archdiocese which they updated in December 2020. Their revocable living trust provides a gift to the Archdiocese of Omaha for Holy Name School to support elementary student tuition.

"Going through our estate plan, we realized that we're not affluent, but we have assets that are well-suited for an end-of-life gift. If we can't give it earlier, at least we can give it at the end," said Tom. "Essentially, we're

tithing from our estate. The late Msgr. Peter Dunne often reminded me that, 'Everything is a gift.' He would quote Corinthians: 'What am I that I have not received, and why do I glory in it as if I had not received it?'"

The choice to include Holy Name School in their estate plan is because of Kathleen's connection to the school and parish, first and foremost. "We'd rather give to one place and have more power than to spread it to 10 or 20 different places," she said. "We still give to other nonprofits and always will, but if it's a significant amount, we want it to have real impact. We can't think of a better place for our gift than for the students and families of Holy Name School."

With Kathleen's inspiration and encouragement, several of her family members increased their giving and created scholarships as well. Today there are three Wingender family scholarships at Holy Name School, including one named for their parents, Ellie and John. Holy Name Parish is where Ellie became Catholic nearly 60 years ago. She made a point to attend the scholarship presentation each year and delighted in having her photo taken with that year's recipient of her scholarship. Kathleen said her mother volunteered to stuff envelopes at the parish even at age 94. Before her death, Ellie was inducted into the Holy Name Hall of Fame.

Although the Cullinan's physical address is now in Texas, their hearts will always be connected to Omaha and their beloved Holy Name. "Omaha has a great tradition of supporting Catholic education" said Kathleen. "We want to be a part of that."

Plan for your future like you plan for your vacation.



There is another area of life that requires good planning. That has to do with your estate plan. A good estate plan can also help ensure you are prepared so that you have what you need when you need it.

One approach that may help you with your planning is to think about the who, the what and the how of your plan.

Who

Matters to You?

Your will or living trust can be used to provide for family, friends and cherished causes. Consider who is important to you and the legacy that you want to leave.

What

Do You Own?

You may own real estate or have personal property such as furniture, cars and other items. Perhaps you have an insurance policy or retirement, bank and investment accounts. You should ensure that your plan accounts for all that you own.

How

Should You Give?

There are many ways for you to provide for the people you love, using what you own. You may want your plan to include charitable vehicles, such as gift annuities and charitable remainder trusts. These can accomplish your charitable goals, give you income and tax benefits, and can provide for your family and friends.

No matter what your goals, we can help you. We have information that can help you put together a plan that is right for you. Please call or email us so that we can assist you.

- 1** Before taking a vacation you carefully pack your bags to ensure you have everything you need.
- 2** Packing often requires planning or making a list.
- 3** With planning, you can make sure you don't forget something important - such as shoes, personal care items, or medicine.

This information is not intended as tax, legal or financial advice. Gift results may vary. Consult your personal financial advisor for information specific to your situation.

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**TRANSFORMATIVE
CHANGE IS HERE!**



Catholic Futures Foundation
of Northeast Nebraska

Introducing the Catholic Futures Foundation of Northeast Nebraska

For more than 45 years, the Omaha Archdiocesan Educational Foundation/Omaha Archdiocesan Parish Foundation (OAEF/OAPF) has had a singular focus: to sustain our Church for future generations.

We continue to focus on the future as we move into a new era, bringing the OAEF and OAPF under a single name: **Catholic Futures Foundation of Northeast Nebraska.**

To learn more about the exciting changes happening within the Catholic Futures Foundation visit us at catholicfutures.org.

Let's talk. We want to learn about what matters most to you and answer your questions about how the Catholic Futures Foundation can help you invest in the future of our Church and transform lives.

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Coming to a Parish Near You!

The Stewardship & Development office tries to schedule at least 12 Sunday Mass intentions per year for living and deceased members of the Living Legacy Circle. Legacy Planning Officer, Tony LaMar, attends every Mass that weekend and speaks at each one to inform parishioners about this recognition society and to encourage this type of charitable giving.

The Living Legacy Circle's living and deceased members will be remembered in prayer during the following Masses held throughout the archdiocese:

Scheduled for 2021

Parish	Date
St. Gerald-Omaha	June 26/27 2021
St. John Vianney-Omaha	June 2021
St. Robert Bellarmine-Omaha	July 17/18 2021
St. Columbkille-Papillion	Aug. 14/15 2021
St. Leo the Great-Omaha	Sept. 18/19 2021
St. John the Evangelist-Valley	Oct. 30/31 2021
St. Margaret Mary	Nov. 6/7 2021

New Living Legacy Circle Members

Anonymous
 Ms. Dorothy M. Lammers
 Mrs. Patricia E. Druke
 Mr. and Mrs. Paul and Patty Mendlik
 Mr. and Mrs. Tim and Francie Conrad
 Mr. and Mrs. Joe and Jeannie Vlock
 Mr. John A. McGowan
 Mr. and Mrs. John† and Joan Holloway
 Mr. and Mrs. John and Nicole Jesse, III

In Memoriam

Recently Deceased Living Legacy Circle Members

Ms. Sharon Holewinski	11/25/20
Mrs. Mary Jane Harvey	12/20/20
Rev. William C. Bartek	1/4/21
Mr. Edward W. Fitzgerald, Jr.	2/19/21
Ms. Merrileen Tippery	3/6/21

Mass Intention for Deceased Living Legacy Circle Members

When one of our Living Legacy Circle members passes away, the Legacy Planning office contacts his or her parish and requests a Mass intention for the repose of their soul. Below is a list of those Masses that were said in the past, as well as those that will be said in the near future. If you can, please come and pray for someone who made the Church a part of his or her lasting legacy.

Previous Living Legacy Circle Member Mass Intentions

Ms. Sharon Holewinski	Sunday, January 24, 2021 at 11:00 am Holy Cross-Omaha
Mrs. Mary Jane Harvey	Thursday, February 11, 2021 at 6:30 am St. Stephen the Martyr-Omaha
Rev. William C. Bartek	Friday, February 19, 2021 at 7:00 am St. Cecilia-Omaha
Mr. Edward W. Fitzgerald, Jr.	TBD - St. Mary Magdalene-Omaha
Ms. Merrileen Tippery	Wednesday, April 21, 2021 at 7:15 am St. Cecilia-Omaha

Legacy Seminars

Many parishes in the archdiocese have hosted seminars or are actively working with Tony LaMar to implement his seminar guidebook and its easy step-by-step plan. If interested in working with Tony on a plan to host a seminar at your parish or school, contact him using his contact information at the bottom of this page.

These parishes and schools have hosted Legacy Planning Seminars with the assistance of the Archdiocese of Omaha Stewardship and Development Office:

Parish/School	Date
St. Columbkille - Papillion	9/9/18
Hartington Cedar Catholic High School - Hartington	9/19/18
Ss. Peter & Paul Catholic Church - Bow Valley	10/14/18
St. John's Hall - Fordyce	11/4/18
St. Patrick - O'Neill	9/8/19
St. Stephen the Martyr - Omaha	10/3/19
St. Frances Cabrini - Omaha	11/7/19
St. Pius/St. Leo - Omaha	1/26/20
St. Bernadette - Bellevue	3/8/20
St. Phillip Neri/Blessed Sacrament - Omaha	11/15/20
Sacred Heart Parish - Norfolk	4/27/21

The Living Legacy Circle



The **Living Legacy Circle** 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 **Living Legacy Circle** offers a unique opportunity for those who want their giving to transcend their own lifetimes. For information about membership, please call Tony LaMar, Legacy Planning Officer, at 402-557-5650.



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