



Legacies

LIVING LEGACY CIRCLE NEWS

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Creating a Legacy that Impacts Lives

Couple's Gift Supports Catholic Education



Duane and Carol Kanne (left) established the Bishop Anthony Milone Tuition Assistance Fund to ensure that families in need have access to a Catholic education at St. Bernadette School in Bellevue.

As lifelong Catholics, Duane and Carol Kanne believed in the life-changing impact of a Catholic education. They also understood that many families struggle to afford the cost of tuition. Guided by their faith, generous spirit and a desire to help the neediest students, the Kannes partnered with the Catholic Futures Foundation of Northeast Nebraska to create a tuition assistance fund that secures their legacy and will impact students and families of

the Archdiocese of Omaha for generations. The Catholic Futures Foundation is the charitable foundation of the Archdiocese of Omaha. The Foundation helps donors make planned gifts that provide perpetual support to the beneficiary of their choice.

In April 2020, the Kannes established the Bishop Anthony Milone Tuition Assistance Fund to ensure that families in need have access to a Catholic education at

St. Bernadette School in Bellevue. The donor-named fund (see page 4 for more Donor-Named funds held in the Catholic Futures Foundation) is a tribute to their friend Bishop Milone – who died in 2018 – a long-time pastor of St. Bernadette and an advocate for Catholic education. Sadly, within months of setting up the tuition assistance fund, Duane passed away. Still, his foresight and devotion to Catholic education lives on through the couple's gift. As a way to honor

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Students at St. Bernadette School benefit from tuition assistance made possible by the fund.

Duane's memory and continue to grow the fund they started together, Carol plans on making Qualified Charitable Distributions (QCDs) before the end of each year via her IRA (Please see: *Use Your IRA to Create a Lasting Legacy* article on pg. 5 for an example of a similar gift vehicle).

Relationship with Bishop Milone Inspires Couple

Bishop Milone served as St. Bernadette's pastor from 1973 to 1988. He was ordained a Bishop in 1981 and was assigned as an



Bishop Milone – who died in 2018 – was a long-time pastor of St. Bernadette and an advocate for Catholic education.

auxiliary bishop to assist the late Archbishop Daniel Sheehan, who was experiencing health issues at the time. Duane even traveled to Rome to attend his ordination. Bishop Milone was installed in 1988 as the sixth bishop of the Diocese of Great Falls - Billings, Montana. After retiring in 2007, he returned to St. Bernadette to live and serve by celebrating mass at the parish and presiding over confirmations in the archdiocese. "We always thought the world of Bishop Milone, and he's just been a saint to us," said Carol.

"I knew Duane and Carol as devout, dedicated members of St. Bernadette, with a great love for Bishop Milone. They were very interested in honoring Bishop Milone for his dedicated and inspiring service to the parish and in assisting families who want to attend Catholic school," recalled Father Harold Buse, former pastor of St. Bernadette.

Indeed, Catholic education has always been central to their lives. Carol attended Omaha's St. Rose Grade School and

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”

Father Harold Buse,
Former pastor of St. Bernadette

Ryan High School. A native of Dedham, Iowa, Duane went to St. Joseph Grade School and Kuemper Catholic High School in Carroll, Iowa. The couple met at St. Joseph Hospital in Omaha, where Duane was studying to become a nuclear medicine tech, and Carol worked as an x-ray tech. After they married, they built a home near St. Bernadette. For more than 44 years, the lives of the Kanne

family centered around their parish community where their two children, Ann and Steven, attended school. Today, many other children have that same opportunity thanks to their gift.

Fr. Buse said the Kanne's generosity, and the impact of their

fund cannot be overstated. "I have seen so many students who benefit from tuition assistance. They bloom and flower while at a Catholic school. They also become instruments through which adults in the family either come to the faith or return to the faith," he said.

"Without tuition assistance funds, they would not have a chance to thrive in this environment. Tuition assistance like that provided by the Bishop Milone Fund makes a big difference in the lives of families and in the life of the church as we pass the faith to a new generation."

About the Catholic Futures Foundation of Northeast Nebraska

With more than 200 funds valued at \$43.2 million as of June 30, 2021, the Catholic education and parish-focused funds held by the Catholic Futures Foundation of Northeast Nebraska are as diverse as are the needs of the communities they serve. Whether you are an individual donor or in leadership at a parish, school or ministry, the Catholic Futures Foundation can help you create a legacy of impact for the causes you or your organization are most passionate about.

How to Make an Impact:

- **Give to an existing fund** - You can make a gift through cash, appreciated stock or retirement assets, to name a few.
- **Create your own fund** - We can help you establish a fund to benefit the parish, school or ministry of your choice. The fund can be in your family's name or you can choose to honor or memorialize someone who has made a difference in your life. A minimum is required to start a fund and anyone can add to the fund in any amount. Over 60 families have established a fund in the Catholic Futures Foundation.
- **Make Planned Gifts** - By including in your will or trust a bequest to your family's fund with the Catholic Futures Foundation you are ensuring the parish, school or ministry you choose to benefit are supported in perpetuity. When you remember your Foundation fund or other archdiocesan entity in your estate plans, we invite you to become a member of the Archdiocese of Omaha's Living Legacy Circle.
- **Pursue your mission** - The Catholic Futures Foundation can help your parish, school or ministry better steward its financial resources so you can confidently pursue your mission and continue to transform lives far into the future.

To learn more about how you can positively impact the future of our church and help transform lives, please contact:

Tim Bogatz
Foundation Officer
402.557.5650 Ext. 1917 (Office)
402.827.3762 (Direct)
Email: tgbogatz@archomaha.org
catholicfutures.org



Catholic Futures Foundation
of Northeast Nebraska

More than a year has passed since Duane's death, and Carol is still adjusting to the immense loss. She also continues to focus on the couple's legacy. She plans to contribute more to the tuition assistance fund. She encourages others to give to it to honor Duane

and increase its impact. "I talk to others and tell them that if they felt like they want to donate, the tuition fund would be a good thing to contribute to."

"I just wish that Duane was still here to see more of this through because he thought so highly of it –

of helping out," said Carol. "He was such a giving person."

To learn more about establishing a named fund please contact: **Tony LaMar** at (402) 557-5650 ext. 1904 or **Tim Bogatz** at (402) 557-5650 ext. 1917.

Donor Named Funds

Below is a list of Donor Named Funds held in the Catholic Futures Foundation. Like the Bishop Milone Tuition Assistance Fund that was set up by Duane and Carol Kanne, a Donor Named Fund is set up by you, in your name or in honor/memory of someone special, and the fund will leave a legacy of support for a Catholic mission dear to your heart. **Thank you to all the benefactors below who have invested in our Church in such a meaningful way.**

Msgr. John Flynn Family Education Trust (High School Tuition Assistance)
 Msgr. Flynn Tuition Assistance Fund (High School Tuition Assistance)
 Tupper O'Hearn Cunningham Fund (Duchesne)
 Emily Cunningham Kozlik Fund (Duchesne)
 Tupper O'Hearn Cunningham Fund (Mercy)
 Robert Cunningham Jr. Fund (Creighton Prep)
 St. Margaret Mary School / Cunningham Fund
 Haney Memorial Fund (St. Pius / St. Leo - Omaha)
 Roncalli High School Cousino/Skinner Endowment
 Justin C. and Ruth E. Lauer Endowment Fund (St. Patrick School - Fremont)
 Clifford Miller Trust (High School Tuition Assistance - Urban)
 Fr. Fitzgerald Education Memorial Fund (High School Tuition Assistance)
 John and Dolores Vipond Endowment Fund (St. Joan of Arc - Omaha)
 Murphy Family Fund (Catholic Elementary Tuition Assistance)
 Rev. Robert J. Eimers Endowment Fund (High School Tuition Assistance)
 Sr. Helen M. Spengler, OSM Endowment Fund (Grant Program & Tuition Assistance)
 Harold & Jeff Peschel Family Memorial Endowment Fund (Roncalli)
 Joseph F. Havelka Music Appreciation Fund (Music in Catholic Schools)
 Russell J. and Eloise J. Battiato Endowment Fund (St. Patrick School - Fremont)
 Margaret R. Bradley Endowment Fund (Duchesne)
 Rolfes Family Education Endowment (Holy Family - Cedar County)
 Florence Husted Educational Endowment (High School Tuition Assistance)
 Sister Patricia Mulcahey Scholarship Fund (High School Tuition Assistance)
 William Randolph Hearst Foundation (High School Tuition Assistance)
 Archbishop Daniel Sheehan Memorial H.S. Scholarship Fund
 Archbishop Elden Curtiss Scholarship Fund (High School)
 Archbishop Daniel Sheehan Memorial Elementary School Scholarship

Archbishop Daniel Sheehan High School Trust Special Fund
 Mary D. Petrasic and Rev. Martin J. Petrasic Memorial Endowment (High School Tuition Assistance)
 Leone & John Beilman Memorial Endowment Fund (High School Tuition Assistance)
 Claude and Agnes Hamilton Endowment (High School Tuition Assistance)
 Msgr. Thomas E. DeBacker Endowment (High School Tuition Assistance)
 Joseph Michael Worthington Memorial Endowment Fund (St. Pius / St. Leo - Omaha)
 Msgr. William S. Whelan Endowment Fund (High School Tuition Assistance)
 Msgr. Charles Brodersen Scholarship Endowment Fund (High School Tuition Assistance)
 Grace J. Souvignier Endowment Fund (High School Tuition Assistance)
 Ryan Furlow Scholarship Endowment Fund (St. Robert School - Omaha)
 Rev. Paul J. Begley, Jr. Family Trust (High School Tuition Assistance)
 Norman J. and Verena C. Mendlik Endowment Fund (St. Wenceslaus School - Dodge)
 Leo and Clara Kathol Development Endowment Fund (Cedar County Catholic Schools)
 James E & Ruthellen W Hollander High School Scholarship Endowment Fund
 James E & Ruthellen W Hollander Scholarship Endowment (Duchesne)
 James E & Ruthellen W Hollander Scholarship Endowment (Creighton Prep)
 James E & Ruthellen W Hollander Scholarship Endowment (Christ the King School)
 Theodore and Effie Kubart Family Endowment Fund (St. Joseph School - Atkinson)
 Paul J. Dougherty Family Scholarship Endowment Fund (St. Joan of Arc - Omaha)
 Msgr. Cyril J. Werner Endowment Fund (Cedar County Catholic Schools)
 Beatrice Houston Jacques Scholarship Endowment Fund (Vocations)
 Blase and Mary Cupich Memorial Scholarship Endowment Fund (Sts. Peter & Paul School - Omaha)

Professor Charles L. Miller Memorial Fund (Music in Catholic Schools)
 Leo and Clara Kathol Memorial Scholarship Fund (Holy Trinity - Hartington)
 Msgr. William S. Whelan Endowment Fund (Howells Community Catholic School - Howells)
 Paul and Patricia Mendlik Family Scholarship Endowment Fund (Skutt)
 Tyler J. Alitz Scholarship Endowment Fund (Roncalli)
 Walter and Mary Ann Steffensmeier Endowment Fund (St. Wenceslaus - Dodge)
 John F. and Anne Marie Daly Endowment Fund (Catholic Education)
 Msgr. Francis E. Kubart Endowment Fund (St. Joseph Parish - Atkinson)
 Gerald F. Petersen Memorial Fund (Archbishop's Dinner for Education)
 Brian M. Smith Memorial Scholarship Fund (Music in Catholic Schools)
 Dave and Linda Shanahan Family Endowment Fund (High School Tuition Assistance)
 Debra J. Lund Endowment Fund (Music in Catholic Schools)
 Bishop Anthony Milone Tuition Assistance Fund (St. Bernadette School - Omaha)
 Michelle Bulau Memorial Scholarship Fund (Graduates of St. Mary High School - O'Neill)
 Shirley and Louis Riha Endowment Fund (Archbishop's Dinner for Education)
 Broderick Family Fund (Tuition Assistance)
 Collins Family Scholarship Fund (St. Bernard School - Bellevue)
 James and Mary Ann Wortmann Family Scholarship (St. Rose of Lima - Crofton)
 Phil and Sophie Laska Memorial Scholarship Fund (St. Anthony School - Columbus)
 Father Michael Schmitz Scholarship (St. Rose of Lima - Crofton)
 Msgr. Cyril J. Werner Cedar Catholic Endowment Fund (Cedar Catholic School - Hartington)
 Richard and Isabelle Kramer Endowment Fund (Holy Family Parish - Cedar County)
 Flaherty/Kiernan Endowment for St. Edward's Cemetery

Use Your IRA to Create a Lasting Legacy.

You have saved and built up the funds in your IRA for years. Now you can use your IRA to create a lasting legacy.

If you are 72 or older, you now have reached the milestone where you must begin taking your annual required minimum distribution (RMD) from your retirement account. Along with that distribution comes taxes on your previously untaxed assets.

However, there is a way to satisfy your RMD requirements while avoiding taxes and supporting the causes that matter most to you. It is called an **IRA Charitable Rollover** gift and it is easy to make.

Simply tell your IRA account custodian that you want to make a “qualified charitable distribution” to our organization. You can give up to \$100,000 per year. With an IRA rollover gift, you may satisfy all or part of your RMD without paying tax on the distribution to charity. A portion or all of your RMD is met and the money goes straight to our organization to help our work.

Don't forget matching gift opportunities! Be sure to take advantage of any employer matching gift opportunities available to you. Your gift can grow and make even more of a difference to the Archdiocese of Omaha or one of its parishes, schools or ministries.

Tax Advantages and Benefits

The IRA Charitable Rollover has definite tax advantages and allows you to use your savings to support causes that are meaningful to you.

- Avoid taxes on transfers of up to \$100,000 from your IRA to support the archdiocese or one of its ministries.
- May satisfy some or all of your RMD for the year.
- Reduce your taxable income and save on taxes, even if you do not itemize deductions.
- Make a gift that is not subject to deduction limits for charitable gifts.
- Use your rollover gift to make payments on an existing pledge to us.

What is an IRA Charitable Rollover?

An IRA Charitable Rollover is a charitable gift made by the owner of an IRA directly to a qualified charity. The owner must be 70½ years of age or older and can transfer up to \$100,000 per year and the transfer may help the owner meet their “required minimum distribution” or RMD.



An Example:

Our office was recently contacted by a longtime supporter of our organization. She recently celebrated her 75th birthday. She and her late husband saved quite a nest egg with their IRA contributions. She has been looking for a way to support our organization. Earlier this year, she made an IRA Charitable Rollover gift for \$20,000 to our endowment in her late husband's memory. She plans to make similar gifts in future years.

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.

The names and images shown here are representative of typical donors and may or may not be actual donors to the organization. Under federal rules your benefits may be different from this example. Please contact us for your specific benefits.

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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 2021-2022

Parish	Date
St. Charles Borromeo - Gretna	Dec. 18 & 19, 2021
St. Patrick - Fremont	Feb. 19 & 20, 2022
St. Mary Magdalene - Omaha	June 18 & 19, 2022
St. John Vianney - Omaha	Oct. 15 & 16, 2022
Sts. Peter & Paul - Omaha	Nov. 19 & 20, 2022

New *Living Legacy Circle* Members

The following have recently notified our office that they have left a bequest for the archdiocese or ones of its parishes schools or ministries in their estate plan.

- Deacon Stephen and Mrs. Angela Luna
- Mr. and Mrs. Joseph and Elizabeth Tometich
- Dr. Patrick and Mrs. Anne Mahoney
- Ms. Rebecca Hier
- Mr. and Mrs. Doug and Judy McWilliams
- Capt. and Mrs. Frederick J. Skinner, USN
- Mrs. Deb Lammers Korth
- Mr. and Mrs. James and Mary Czyz

In Memoriam

Recently Deceased *Living Legacy Circle* Members

- Mr. Francis A. Wortmann 4/26/20
- Mr. Reynold Vering 5/2/20
- Fr. Michael G. Printy 6/16/21

Eternal rest grant unto them, O Lord, and let perpetual light shine upon them. May the souls of all the faithful departed, rest in peace. Amen

Mass Intention for Deceased *Living Legacy Circle* Members

When one of our *Living Legacy Circle* members passes away, the Legacy Planning office contacts their 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 their lasting legacy.

Previous *Living Legacy Circle* Member Mass Intentions

- Mr. Reynold Vering Saturday, October 11, 2021 at 11:00 am
Sts. Peter & Paul - Howells
- Mr. Francis A. Wortman Tuesday, August 4, 2021 at 5:30 pm
Holy Trinity Parish - Hartington
- Fr. Michael J. Printy Monday, July 20, 2021 at 7:00 am
St. Cecilia - Omaha

Legacy Seminars

Many parishes in have hosted seminars or are actively working with the Legacy Planning office to implement Tony LaMar's seminar guidebook and its easy step-by-step plan. If interested in hosting a seminar at your parish or school, contact Tony LaMar whose contact information is below.

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
Christ the King Parish - Omaha	3/7/21
Sacred Heart Parish - Norfolk	4/27/21

Upcoming:

- St. Stephen the Martyr - Omaha 1/27/22
- St. Patrick - Fremont 2/20/21

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.



Tony LaMar
Legacy Planning Officer

402-557-5650
email: ajlamar@archomaha.org

Archdiocese of Omaha
Stewardship & Development Office

2222 N. 111th Street
Omaha, NE 68164