



Legacies

LIVING LEGACY CIRCLE NEWS

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Catholic Futures Foundation: Working Toward Our Church's Fruitful Future



Bonnie Nebuda accepted the position as Foundation Officer for the CFF in September of 2022.

Welcome, Bonnie Nebuda

Last fall, the Stewardship and Development Office at the Archdiocese of Omaha welcomed **Bonnie Nebuda** as the new officer of the Catholic Futures Foundation of Northeast Nebraska. Bonnie brings a wealth of fundraising experience to the Archdiocese. Previous positions include director of advancement at Archbishop Bergan Catholic School and director of parish and school advancement at St. Patrick Catholic Church and Archbishop Bergan Catholic School in Fremont, Nebraska.

"I'm most excited to be working with rural communities across northeast Nebraska. Knowing that I can have an impact on the sustainability of some of our smaller parishes, schools and ministries is something truly special," Bonnie says. "The generosity of people throughout the Archdiocese feeds my desire to help our church communities reach their goals through the various opportunities we have within the Catholic Futures Foundation."

It's not surprising that the Archdiocese's rural communities have a special place in Bonnie's heart. She was raised on a farm near Dodge, Nebraska, and worshipped at Sacred Heart Catholic Church in Olean. Her time in 4-H further fueled her interest in agriculture, and she went on to study agricultural economics at the University of Nebraska-Lincoln. She has a master's degree in organizational leadership from the College of St. Mary.

During her time at UNL, she worked in several rural communities as part of an inter-generational dialogues program, which brought multiple generations together for community

advancement. She drew upon this knowledge when she joined the Fremont Area Chamber of Commerce, where she worked prior to joining St. Patrick and Bergan.

"Early in my career in Fremont, I learned that community betterment happens at a multitude of levels, and especially at the most basic level within our parishes and schools," Bonnie says.

And now, Bonnie seeks to help secure the Archdiocese of Omaha for generations to come as officer of the Catholic Futures Foundation.

Creating a Legacy through a CFF Fund

Catholic Futures Foundation of Northeast Nebraska is a charitable, nonprofit founded in 1975 to provide support for the religious and educational missions of the Archdiocese of Omaha. Its sole purpose is to provide long-term financial stability to the organizations of the archdiocese and help sustain their work in building up the Kingdom of God in northeast Nebraska.

Bonnie calls it a "pipeline of funding" that benefits archdiocesan

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parishes, schools, and ministries in perpetuity.

Catholic Futures Foundation's effect is far-reaching. Since 1980, CFF has distributed more than \$30 million. Eighty-two funds impact urban communities, 86 funds benefit rural communities and 32 funds enhance all members of the Archdiocese.

A Catholic Futures Foundation fund is a powerful financial vehicle that allows people to support organizations and causes dear to their hearts now and for years to come. The Stewardship and Development Office is cognizant of and grateful for all the many gifts people share with the Archdiocese. Their generosity in giving of their time, talents and treasure is why the faith communities within the Archdiocese of Omaha are so vibrant.

Establish – and Grow – a Fund with Confidence

One especially meaningful opportunity is donor named funds. Named fund gifts extend beyond addressing current needs; they help sustain the organizations and programs of the archdiocese in perpetuity so future generations may enjoy the same dynamic Church we know today.

In 1989, the family of **Robert Cunningham** started five donor named funds for tuition assistance to various schools throughout Omaha. Over the years, those funds have accumulated a total market value of \$80,087. But most importantly is the \$135,119.86 that has been distributed from these funds and allowed students to continue their Catholic education in the past 34 years. Funds like these exist throughout the Archdiocese of Omaha and are the quiet champions of sustainability

for our parishes, schools and ministries.

A fund can honor a donor's memory or a loved one of the donor while benefitting organizations within the Archdiocese of Omaha. Examples include, but aren't limited to, a donor's home parish, Catholic education, lay ministry formation programs, youth and young adult programs, seminary trust fund, priest retirement home trust fund, and clergy assistance trust fund.

John Wingender, Jr., PhD, professor of finance at Creighton University's Heider College of Business and chair of the CFF Investment and Finance Committee, says most of the funds CFF manages benefit parishes within the Archdiocese, with parish leadership distributing monies according to the fund purpose: education, staffing, ministries, etc.

John has a long history of channeling his financial expertise in service of the Church. He has served on multiple parish councils and finance committees, and several pastors have asked him to evaluate their parish financial management.

"CFF does everything better and more cost effectively," he has concluded. "It frees up the time and energy of so many talented parishioners to do other ministries and stewardship for the glory of God."

The process of managing CFF funds is transparent, and many layers of checks and balances exist.

First, all investments mirror Catholic principles and teachings, says Bonnie. Only investments that pass the Catholic values screening, the investment standards established by the United States Conference of Catholic Bishops, will be considered as investment options. This screening is on-going, John adds.

"The CFF Investment and Finance Committee reviews the firms being excluded and included," he continues. To date, "the committee has only identified a couple of firms that we felt should be screened as we monitor the investments."

The good news is that adhering to Catholic values has not watered down the value of the funds. "Since the inception of our screening in 2017, we have tracked within 1 basis point (0.01%) of a comparable unscreened benchmark portfolio," John says. The average ROI of CFF funds is an impressive 7%.

Next, oversight is thorough – very, very thorough. Multiple layers of supervision are in place to monitor fund performance. Funds are managed by certified financial advisors (currently, Merrill Lynch), with advisor and administration fees capped at 1%.

Investment policies and performance goals are reviewed annually by CFF's Investment Finance Committee and Board of Trustees. Further, Catholic Futures Foundation funds are audited yearly by an external auditor (Lutz, at present). Finally, the annual reports "are amazingly in depth and understandable," John says.

It's important to note that donors drive this bus. Because it is their fund, it can be as specific or as open as they like when choosing a beneficiary of their fund. If choosing a specific program or ministry within a parish or school, it is best practice to involve the local pastor or school administrator early in the process.

At least \$25,000 is needed to start a new fund. This initial gift can be cash, a pledged estate gift, an IRA transfer or a combination of these three revenue paths. Donors have five years from the fund's inception

to reach the \$25,000 requirement. Once the fund reaches this value and has been in existence for at least 13 months, beneficiaries will begin to receive their 5% distributions.

Plus, establishing a named fund with CFF doesn't have to be a

one-and-done giving opportunity. Donors can continue to grow the fund with annual giving. Also, funds are open to contributors other than establishing donors. They are a perfect way to honor the fund creator at birthdays, anniversaries and the holidays.

"Have your finance committee call Bonnie to get started right away," John advises. "Your planned giving will be managed by the highest caliber team possible for the benefit of many."

By alleviating concerns regarding financial management, CFF frees

About the Catholic Futures Foundation of Northeast Nebraska

With more than 226 funds valued at \$43 million as of June 30, 2023, 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:

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402.557.5650 (Office)
402.827.3762 (Direct)
Email: blnebuda@archomaha.org
catholicfutures.org



Catholic Futures Foundation
of Northeast Nebraska

church leaders and ministers to play to their strengths – carrying out the missions of the Archdiocese’s parishes, schools, organizations, and ministries.

Says Bonnie: “The legacy people leave through Catholic Futures Foundation is one that will span

generations and ensure a stronger Catholic Church in the Archdiocese of Omaha for years to come.”

To learn more about the 200+ funds within the Foundation or to establish a new fund, please

contact Bonnie Nebuda at 402.557.5650, ext. 1917 or blnebuda@archomaha.org.

For more information on Catholic Futures Foundation of Northeast Nebraska, visit www.catholicfutures.org.

Donor Named Funds

Below is a list of Donor Named Funds held in the Catholic Futures Foundation. 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.**

- Tyler J. Alitz Scholarship Endowment Fund (Roncalli)
- Russell J. and Eloise J. Battiato Endowment Fund (Archbishop Bergan - Fremont)
- Rev. Paul J. Begley, Jr. Family Trust (High School Tuition Assistance)
- Leone & John Beilman Memorial Endowment Fund (High School Tuition Assistance)
- Margaret R. Bradley Endowment Fund (Duchesne)
- Margaret A. and Robert J. Broderick, Sr. Family Fund (High School Scholarship)
- Msgr. Charles Brodersen Scholarship Endowment Fund (High School Tuition Assistance)
- Michelle Bulau Memorial Scholarship Fund (College Scholarship)
- Cedar County Catholic Schools Teacher Salary Fund (Cedar Catholic Schools)
- Collins Family Scholarship Fund (St. Bernard)
- Roncalli High School Cousino/Skinner Endowment (Roncalli)
- Tupper O'Hearn Cunningham Fund (Duchesne)
- Emily Cunningham Kozlik Fund (Duchesne)
- Tupper O'Hearn Cunningham Fund (Mercy)
- Robert Cunningham Jr. Fund (Creighton Prep)
- Blase and Mary Cupich Memorial Scholarship Endowment Fund (Sts. Peter and Paul)
- Archbishop Elden Curtiss Scholarship Fund (High School Tuition Assistance)
- Jim and Mary Czyn Family Fund (Special Projects/Catholic Education)
- John F. and Anne Marie Daly Endowment Fund (Catholic Education)
- Msgr. Thomas E. DeBacker Endowment (High School Tuition Assistance)
- Paul J. Dougherty Family Scholarship Endowment Fund (St. Joan of Arc)
- Rev. Robert J. Eimers Endowment Fund (High School Tuition Assistance)
- Fr. Fitzgerald Education Memorial Fund (High School Tuition Assistance)
- Flaherty/Kiernan Endow for St. Edward's Cemetery (St. Edward)
- Msgr. John Flynn Family Education Trust (High School Tuition Assistance)
- Msgr. Flynn Tuition Assistance Fund (High School Tuition Assistance)
- Ryan Furlow Scholarship Endowment Fund (St. Robert Bellarmine)
- Claude and Agnes Hamilton Endowment (High School Tuition Assistance)
- Haney Memorial Fund (St. Pius X/St. Leo)
- Leonard V. and Adele M. Hassenstab Endowment Fund (St. Francis - Humphrey)
- Joseph F. Havelka Music Appreciation Fund (Music in Catholic Schools)
- William Randolph Hearst Foundation (High School Tuition Assistance)
- James E & Ruthellen W Hollander High School Scholarship Endowment Fund (High School Tuition Assistance)
- 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)
- Florence Husted Educational Endowment (High School Tuition Assistance)
- Beatrice Houston Jacques Scholarship Endowment Fund (Seminary)
- Leo and Clara Kathol Development Endowment Fund (Cedar County)
- Leo and Clara Kathol Memorial Scholarship Fund (Holy Trinity Elementary)
- Richard and Isabelle Kramer Endowment Fund (All Saints - Fordyce)
- Theodore and Effie Kubart Family Endowment Fund (St. Patrick - O'Neill)
- Msgr. Francis E. Kubart Endowment Fund (High School Tuition Assistance)
- Phil and Sophie Laska Memorial Scholarship Fund (St. Anthony - Columbus)
- Justin C. and Ruth E. Lauer Endowment Fund (St. Patrick - Fremont)
- Debra J. Lund Endowment Fund (Music in Catholic Schools)
- Norman J. and Verena C. Mendlik Endowment Fund (St. Wenceslaus - Dodge)
- Paul and Patricia Mendlik Family Scholarship Endowment Fund (Skutt)
- Patricia and Paul Mendlik Catholic Education Excellence Fund (Archbishop's Dinner for Education)
- Clifford Miller Trust (High School Tuition Assistance)
- Professor Charles L. Miller Memorial Fund (Music in Catholic Schools)
- Bishop Anthony Milone Tuition Assistance Fund (St. Bernadette - Bellevue)
- Sister Patricia Mulcahey Scholarship Fund (High School Tuition Assistance)
- St. Richard (Murphy Family Fund) (Children's Scholarship Fund)
- Harold & Jeff Peschel Family Memorial Endowment Fund (Roncalli)
- The Gerald F. Petersen Memorial Fund (Archbishop's Dinner for Education)
- Mary D. Petrasic and Rev. Martin J. Petrasic Memorial Endowment (High School Tuition Assistance)
- Shirley and Louis Riha Endowment Fund (Archbishop's Dinner for Education)
- Rolfes Family Education Endowment (All Saints - Fordyce)
- Father Michael Schmitz Scholarship (St. Rose of Lima - Crofton)
- Paul & Karen Schulte Scholarship Fund (Norfolk Catholic)
- Gene and Kathy Schwarting Endowed Scholarship (Sts. Peter and Paul)
- The Christopher Segrell Development Fund (Christ the King)
- Dave and Linda Shanahan Family Endowment Fund (High School Tuition Assistance)
- Archbishop Daniel Sheehan Memorial H.S. Scholarship Fund (High School Tuition Assistance)
- Archbishop Daniel Sheehan Memorial Elementary School Scholarship (Children's Scholarship Fund)
- Archbishop Daniel Sheehan High School Trust Special Fund (Catholic Education)
- Brian M. Smith Memorial Scholarship Fund (Music in Catholic Schools)
- Grace J. Souvignier Endowment Fund (High School Tuition Assistance)
- Sr. Helen M. Spengler, OSM Endowment Fund (Grant Program)
- Walter and Mary Ann Steffensmeier Endowment Fund (St. Wenceslaus - Dodge)
- Msgr. Cyril J. Werner Endowment Fund (Cedar County Catholic Schools)
- Msgr. Cyril J. Werner Cedar Catholic Endowment Fund (Cedar Catholic High School)
- Msgr. William S. Whelan Endowment Fund (CUES)
- Msgr. William S. Whelan Endowment Fund (Howells Community Catholic School - Howells)
- Msgr. Richard A. Wolbach Tuition Assistance Fund (Consortium)
- Joseph Michael Worthington Memorial Endowment Fund (St. Pius X/St. Leo)
- James and Mary Ann Wortmann Family Scholarship (St. Rose of Lima - Crofton)
- John and Dolores Vipond Endowment Fund (St. Joan of Arc)

AUGUST IS MAKE-A-WILL-MONTH

Make a Will, Make a Way

If there's a will...there's definitely a way.

Your will is your way to protect your loved ones, ensure your wishes are honored and even make an impact with your legacy. August is *National Make-A-Will-Month* and FreeWill's free estate planning tool, available to all parishioners in the Archdiocese of Omaha, is a simple and cost-free way for you to chart your own way during National Make-A-Will Month.

Start your will today at
freewill.com/ArchOmaha.



FREEWILL



A gift for your future

Living Legacy Circle Member Appreciation Mass & Luncheon

The Archdiocese of Omaha recently held its inaugural Living Legacy Circle Member Appreciation Mass & Luncheon. It was a wonderful opportunity to thank those who help ensure that the Catholic Church in northeast Nebraska remains strong for generations to come. They are a true blessing.

For more information on how to become a member of the Living Legacy Circle through a provision in your estate plan for the Archdiocese of Omaha, the Catholic Futures Foundation of Northeast Nebraska or a parish or school within the archdiocese, contact Tony LaMar at 402-557-5650 or ajlamar@archomaha.org.



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 2023

Parish	Date
St. Patrick - O'Neill	Sept. 9 & 10, 2023
Sacred Heart - Omaha	Sept. 23 & 24, 2023
Mary Our Queen - Omaha	Oct. 7 & 8, 2023
St. Joseph - Springfield	Nov. 19, 2023
St. Frances Cabrini - Omaha	Dec. 2 & 3, 2023

New Living Legacy Circle Members

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

Dr. Jerry and Marilyn Buresh	St. Wenceslaus-Omaha
Preston and Emily Leise	Holy Family-Hartington
Matt and Kathie Dresden	Holy Family-Hartington
Brandon and Traci Baller	Holy Family-Hartington
Michael and Denise Terneus	St. Peter-Omaha
James and Marilyn Schroer	St. Wenceslaus-Omaha
Tim and Kari Kudron	St. Wenceslaus-Omaha
Kathryn Kudron	St. John Vianney-Omaha
Calvin and Karen German	Christ the King-Omaha
Craig and Christine Boro	Ss. Peter and Paul-Omaha
Bill and Lori Briggs	St. Vincent de Paul-Omaha
Bob and Annette Elliott	St. Vincent de Paul-Omaha
Daniel and Francine Patten	Christ the King-Elkhorn
Tim and Nancy Towey	St. Wenceslaus-Omaha
Deacon Edward and Kathy† Bevan	St. Matthew-Bellvue
Robb and Amy Huck	St. Matthew-Bellvue
Clayton and Joan Jones	St. Wenceslaus-Omaha
Jim and Magaret† Roubal	Christ the King-Omaha
Diane Dougherty Crowley and Tom Crowley	St. Margaret Mary-Omaha
Karen Stevens	St. Wenceslaus-Omaha
Dan Naylon	St. Wenceslaus-Omaha
Brandon and Jill Mason	St. Wenceslaus-Omaha
Joe and Diane Schwaller	St. Vincent de Paul-Omaha
Stacy Hug	St. Columbkille-Omaha
John and Morgan Metzger	Aliquippa, PA
Michael and Suzie Lawler	St. Robert Bellarmine-Omaha

In Memoriam

Recently Deceased Living Legacy Circle Members

Irene Wortmann	12/18/21
Dr. D. Paul Hartnett	6/27/22
Dr. Karen Lauer-Silva	7/1/22
Becky Tometich	10/1/22
Dr. Gerald Ries	11/1/22
Fr. Robert Preisinger	11/1/22
Adele Hassenstab	11/17/22
Fr. Hugh Schwartz	1/20/23
Leonard Hassenstab	1/27/23
Dan Monen	2/20/23

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 his or her lasting legacy.

Previous Living Legacy Circle Member Mass Intentions

Dr. Karen Lauer-Silva	July 18, 2022 at 6:30 am St. Patrick-Fremont
Dr. D. Paul Hartnett	August 14, 2022 at 10:30 am St. Mary-Bellevue
Irene Wortmann	December 28, 2022 at 9:30 am Coleridge Nursing Home
Dr. Gerald Ries	January 12, 2023 at 8:15 am Christ the King-Omaha
Fr. Robert Preisinger	January 20, 2023 at 11:15 am St. Cecilia-Omaha
Becky Tometich	January 22, 2023 at 9:30 am St. Gerald-Omaha
Fr. Hugh Schwartz	February 7, 2023 at 7:00 am St. Cecilia-Omaha
Dan Monen	March 28, 2023 at 8:00 am Sacred Heart-Omaha
Adele Hassenstab	August 7, 2023 at 8:00 am St. Francis-Humphrey
Leonard Hassenstab	January 7, 2024 at 10:00 am St. Francis-Humphrey

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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