

**BUSINESS POLICY CONTACTS**

**ARCHDIOCESAN STAFF**  
**402-558-3100 (See below for extension)**

<b>INDIVIDUAL</b>	<b>PHONE NUMBER</b>	<b>E-MAIL/WEB SITE</b>	<b>FAX NUMBER</b>
<b>REV. SCOTT HASTINGS</b> Vicar General	402-558-3100 Ext. 3030	sahastings@archomaha.org	402-551-4212
<b>DEACON TIMOTHY F. McNEIL</b> Chancellor	402-558-3100 Ext. 3029	tfmneil@archomaha.org	402-551-4212
<b>JIM STOLZE</b> Chief Financial Officer	402-558-3100 Ext. 3005	jjstolze@archomaha.org	402-561-1210
<b>STEPHEN CARTER</b> Controller	402-558-3100 Ext. 3001	spcarter@archomaha.org	402-561-1210
<b>JEREMY SMITH</b> Accounting Manager	402-558-3100 Ext. 3003	jjsmith@archomaha.org	402-561-1210
<b>STEPHANIE RHEA</b> Staff Accountant/Internal Auditor	402-558-3100 Ext. 3053	srhea@archomaha.org	402-561-1210
<b>JUNE FRITZ</b> Bookkeeper	402-558-3100 Ext. 3002	jefritz@archomaha.org	402-561-1210
<b>LE ANN MOLL</b> Benefits & Internal Audit Specialist	402-558-3100 Ext. 3046	lmoll@archomaha.org	402-561-1210
<b>SHAWN BAAS</b> Chief Information Officer	402-557-5500 Ext. 1400	smbaas@archomaha.org	402-827-3793
<b>DOUG FOLEY</b> Database Manager	402-558-3100 Ext. 3004	djfoley@archomaha.org	402-554-0783
<b>MICHAEL EMMERICH</b> Director of Liturgical Formation	402-553-5524 Ext. 3	mjemmerich@archomaha.org	402-558-1325

**ARCHDIOCESAN LEGAL COUNSEL**

<b>INDIVIDUAL</b>	<b>PHONE NUMBER</b>	<b>E-MAIL/WEB SITE</b>	<b>FAX NUMBER</b>
<b>PATRICK FLOOD</b> PANSING HOGAN ERNST & BACHMAN LLP	402-397-5500	PFlood@pheblaw.com	402-397-4853
<b>WILLIAM BEERMAN</b> PANSING HOGAN ERNST & BACHMAN LLP	402-397-5500	wbeerman@pheblaw.com	402-397-4853

**BUSINESS POLICY CONTACTS**

<b>CATHOLIC MUTUAL GROUP (Property &amp; Liability Insurance)</b> <b>800-228-6108 (See below for extension)</b>			
<b>INDIVIDUAL</b>	<b>PHONE NUMBER</b>	<b>E-MAIL/WEB SITE</b>	<b>FAX NUMBER</b>
<b>BRIAN DUROW</b> Claims/Risk Manager	402-514-2417	bdurow@catholicmutual.org	402-551-2943
<b>NICHOL SORENSEN</b> Member Services Representative	402-960-0214	Nsorensen@catholicmutual.org	402-551-2943
<b>KATHY GOAD</b> Workers Compensation Claims Specialist	800-228-6108 Ext. 2433	kgoad@catholicmutual.org	402-551-2943

**KYLIE KARNISH**  
Support Specialist

800-228-6108    kkarnish@catholicmutual.org  
Ext. 2330

## ARCHDIOCESAN SPONSORED BENEFIT PLAN CONTACTS

<b>LAY EMPLOYEE HEALTH/DENTAL/VISION, LIFE/AD&amp;D AND LTD PLANS</b>			
<b>COMPANY/INDIVIDUAL</b>	<b>PHONE NUMBER</b>	<b>E-MAIL/WEBSITE</b>	<b>FAX NUMBER</b>
CATHOLIC MUTUAL GROUP Plan Consultant CONTACT: <b>CATHRYN BECK</b> (Day to Day Questions)	402-514-2204 800-228-6108 Ext. 2204	cbeck@catholicmutual.org	402-514-2290
ARCHDIOCESE OF OMAHA Plan Administrator and Billing CONTACTS: <b>Le Ann Moll</b> <b>Stephen Carter</b> (Day to Day Questions)	402-558-3100	lmmoll@archomaha.org spcarter@archomaha.org	402-561-1210
<b>UNITED HEALTHCARE</b> Claim Administrator <b>CUSTOMER SERVICE</b> Medical:  Dental:  Pre-Certification Review:  Physician/Hospital Network Access	   888-607-5214  877-816-3596  888-607-5217  888-607-5214	   www.myuhc.com	
<b>CAREMARK</b> (Pharmacy Network)	800-565-7091	www.caremark.com	
<b>VSP</b> (Vision Services Network)	800-877-7195	www.vsp.com	

ARCHDIOCESAN SPONSORED BENEFIT PLAN CONTACTS

403(b) PLAN			
COMPANY/INDIVIDUAL	PHONE NUMBER	E-MAIL/WEBSITE	FAX NUMBER
MERRILL LYNCH Investment Consultants <b>JIM AMBROSE</b> (Investments/Enrollment Questions) <b>MIKE LIGHTHART</b> (Investments/Enrollment Questions)	800-937-0892  402-496-5145  402-496-5114	  j_ambroseii@ml.com  michael_j_lighthart@ml.com	  402-218-4749  402-218-4749
ASCENSUS Client Relationship Manager <b>Justin Schaffer</b>  Secondary Contact (in Justin's absence) <b>Raquel Garcia</b>	855-892-9255	j.schaffer@ascensus.com  r.garcia@ascensus.com	218-855-6010
ASCENSUS  Login for Employer Funding		  <a href="http://www.sponsorinsight.com">www.sponsorinsight.com</a>	
<b>Participant:</b> <b>CUSTOMER SERVICE</b>  Login for Individual Employee/participants	888-800-5359	(M_F, 8:30 a.m. to 7:00 p.m. EST)  <a href="http://www.myaccount.ascensus.com/ml">www.myaccount.ascensus.com/ml</a>	

**ARCHDIOCESAN DEPOSIT AND LOAN FUND  
(Omaha Archdiocesan Deposit and Loan Fund, Inc.)**

**Purpose**

The Archdiocesan Deposit and Loan Fund was established to provide a means through which those parishes with surplus funds might assist others in financing building or major renovation projects. The safety of these funds is overseen by an Archdiocesan Deposit and Loan Board of Trustees, made up of the Archbishop, Vicar General, Archdiocesan Finance Director, active pastors and lay professionals.

**Investments**

RATE PAID ON DEPOSITS – EFFECTIVE JANUARY 1, 2024: 3.5%

FEBRUARY 1ST of each year, each parish is asked to calculate the amount of excess funds on hand, beyond that required to operate parish programs for 60 days. Fifty percent (50%) of this amount must be deposited in the Archdiocesan Deposit and Loan Fund for investment. Copies of the sample form and annual calculation form are attached (exhibits 1 and 2). The required form is due at the Archdiocesan Finance Office by MARCH 1<sup>st</sup> of each year. The actual deposit must be forwarded to the Archdiocesan Finance Office by no later than JULY 1<sup>st</sup> of each year. The check should be made out to the "Deposit and Loan Fund," with a letter confirming your instructions.

Deposit activity, including deposits, withdrawals, and interest accrual, can be accessed online at <https://dsonline.us/omaha/authenticate.asp>. If you need assistance with using the website or logging in, please contact the Finance Office. The rate paid on each deposit account is VARIABLE and interest is paid QUARTERLY by Electronic Funds Transfer (EFT). (Any interest on deposit balances amounting to less than \$100.00 will be rolled into the deposit principal rather than paid to the parish through an EFT.)

The rate of interest paid on deposit accounts is reviewed by the Archdiocesan Deposit and Loan Board annually. The investment strategy for monies in the Fund is continually reviewed for safety, return on investment and liquidity needs.

All parish deposits are guaranteed by the Archdiocese and may be withdrawn without penalty. It is asked that a THIRTY DAY NOTICE be given to the Archdiocesan Finance Office prior to funds being withdrawn. Emergency situations may cause this notice to be waived.

**Loans**

BASE RATE CHARGED FOR LOANS EFFECTIVE JANUARY 1, 2024: 5.5%

Should your parish want to obtain a loan from the Fund, send a letter to the Archdiocesan Finance Office stating the amount and project it will be financing or a copy of the loan request form attached (Exhibit 3). (Loans will NOT be granted for payment of operating expenses). Large building projects must be reviewed by the Archdiocesan Building Committee (see Archdiocesan Construction/Capital Improvement) policy and approved by the Archbishop before a related loan will be considered by the Archdiocesan Deposit and Loan Board.

The Archdiocesan Deposit and Loan Board will review a loan request based on its need and the ability of a parish to safely repay it, plus interest, within a reasonable time period. AS THE FUND CONSISTS OF PARISH MONIES, LOANS CANNOT AND WILL NOT BE FORGIVEN BY THE ARCHDIOCESE. All loans are evidenced by a promissory note, with a monthly amortization schedule, noting repayment dates and amounts.

A parish may request up to a 20 year loan. The first five years will be at the prevailing loan rate when it is first drawn from the Fund. At the end of each subsequent 5 year period, the loan rate will be adjusted to the then prevailing rate, which will be effective for a new 5 year period or to the end of the loan, whichever is shorter. The loan may be repaid by a parish at any time without penalty.

### **Conclusion**

Any questions concerning the annual determination of excess parish funds for deposit or inquiry about loans should be directed to the Archdiocesan Finance Director.

**ARCHDIOCESE OF OMAHA  
DEBT FINANCING**

**EXHIBIT 3**

**DEPOSIT AND LOAN FUND  
LOAN REQUEST FORM**

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Parish / School: \_\_\_\_\_

ID Number: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

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Purpose of Loan: \_\_\_\_\_  
\_\_\_\_\_

Amount Requested: \$ \_\_\_\_\_

Date Required: \_\_\_\_\_

Repayment Schedule: \_\_\_\_\_

Approx. Mo. Payment: \_\_\_\_\_

Number of Months: \_\_\_\_\_

Pastor/Administrator Signature: \_\_\_\_\_

Date: \_\_\_\_\_

**Required Parish/School Bank Information for Loan Disbursement**  
**(via Electronic Funds Transfer)**

Bank Name: \_\_\_\_\_ Routing #: \_\_\_\_\_ Account #: \_\_\_\_\_

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**INTEREST RATE: 5.5 %**

**ARCHDIOCESE OF OMAHA  
DEBT FINANCING**

**EXHIBIT 4**

**DEPOSIT AND LOAN FUND  
WITHDRAWAL REQUEST FORM**

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Parish / School: \_\_\_\_\_

ID Number: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

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Purpose of Withdrawal: \_\_\_\_\_

\_\_\_\_\_

Amount Requested: \$ \_\_\_\_\_

Date Required: \_\_\_\_\_

Pastor/Administrator Signature: \_\_\_\_\_

Date: \_\_\_\_\_

**Required Parish/School Bank Information for Withdrawal Disbursement  
(via Electronic Funds Transfer)**

Bank Name: \_\_\_\_\_ Routing #: \_\_\_\_\_ Account #: \_\_\_\_\_

Savings or Checking (circle one)

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**COMPENSATION/BENEFIT SCHEDULE FOR ASSIGNED ARCHDIOCESAN PRIESTS**

**Direct Payments Monthly:**

- Base salary - \$2,675 monthly, with stoles fees and stipends retained by the priest (effective July 1, 2024)
- Ordination increments - \$15 added for each year of service

**Other Available Benefits:**

- Health insurance - \$1,760 monthly premium paid by the parish or institution to Priest Health Plan (effective March 1, 2023)
- Retirement fund - \$525 assessment funded monthly by parish or institution to Retirement Fund (effective July 1, 2024)
- Continuing education - Combined reimbursement to priest up to \$1,500 annually, **documented** to parish (some archdiocesan-sponsored trainings (e.g., Good Leaders/Good Shepherds) may qualify for up to \$2,500 parish reimbursement)
- Room and board
  - Housing and groceries\* provided to priest, or priest administrator, associate priests and priests in residence
  - Parish-paid personal meals at restaurants are allowed, but the maximum allowed per month is \$500 if there is not a cook on staff, \$100 if there is a cook on staff
  - Business meals do not count against monthly maximum, but the business purpose must be documented when submitting for payment
- \*Alcohol, tobacco, and personal toiletries are excluded
- Laundry/dry cleaning - Reimbursed to priest as **documented** to parish
- Cell phone service - Reimbursed up to \$80 per month to priest (available to pastors, associates, and chaplains) as **documented for cell phone service not paid by the parish**
- Cable / Streaming TV - Reimbursed up to \$100 per month to priest as **documented for basic tv package not paid for by the parish**

**Other Available Benefits (continued):**

- Insurance      -Personal property insurance - \$25,000 as provided through Catholic Mutual
- Personal liability insurance - \$300,000 as provided through Catholic Mutual

**Additional Info:**

**Year of ordination increments** - Each priest's salary is computed by adding \$15 per month per year of ordination to the base salary (see attached schedules). The increase occurs each year on July 1 based on years of ordination at that date. Salary is paid by the parish or institution to which the priest is assigned.

**Health insurance** - The Archdiocese of Omaha Priest Health Plan is negotiated in February of each year and new rates become effective March 1. The health insurance plan includes medical, dental, prescription drug, and vision insurance benefits.

**Room and board** - Priests should use the minimum figure of \$600 per month for room and board provided by the parish for social security purposes. **This is not a cash transfer to individual priests.** Food allowances or meals outside of rectory (non-business meals), paid by parish, may result in taxable income to the priest.

**Automobile mileage** - All priests are entitled to reimbursement for travel required in service to the church (parish, archdiocesan and other church-related business). This does not include personal and private use of the auto. The mileage reimbursement rate will be determined each year based on federal standards. The January 1, 2024 rate is 67 cents per mile. Documentation of the actual mileage and purpose of the trip must be presented and kept on file in parish or institution. (In the future, the mileage rate will automatically change when a new Internal Revenue Service rate becomes effective). Automobile allowance of a flat dollar amount may not be substituted for actual mileage documentation.

**CLERGY SALARY SCHEDULE**  
**\$2,675 BASE SALARY**  
**(\$15 salary increment for years of service)**

<b>Number of Years since Ordination</b>	<b>Monthly Salary Amount</b>	<b>Annual Salary Amount</b>	<b>Number of Years since Ordination</b>	<b>Monthly Salary Amount</b>	<b>Annual Salary Amount</b>
<b>Base</b>	\$2,675	\$32,100	21	\$2,990	\$35,880
1	\$2,690	\$32,280	22	\$3,005	\$36,060
2	\$2,705	\$32,460	23	\$3,020	\$36,240
3	\$2,720	\$32,640	24	\$3,035	\$36,420
4	\$2,735	\$32,820	25	\$3,050	\$36,600
5	\$2,750	\$33,000	26	\$3,065	\$36,780
6	\$2,765	\$33,180	27	\$3,080	\$36,960
7	\$2,780	\$33,360	28	\$3,095	\$37,140
8	\$2,795	\$33,540	29	\$3,110	\$37,320
9	\$2,810	\$33,720	30	\$3,125	\$37,500
10	\$2,825	\$33,900	31	\$3,140	\$37,680
11	\$2,840	\$34,080	32	\$3,155	\$37,860
12	\$2,855	\$34,260	33	\$3,170	\$38,040
13	\$2,870	\$34,440	34	\$3,185	\$38,220
14	\$2,885	\$34,620	35	\$3,200	\$38,400
15	\$2,900	\$34,800	36	\$3,215	\$38,580
16	\$2,915	\$34,980	37	\$3,230	\$38,760
17	\$2,930	\$35,160	38	\$3,245	\$38,940
18	\$2,945	\$35,340	39	\$3,260	\$39,120
19	\$2,960	\$35,520	40	\$3,275	\$39,300
20	\$2,975	\$35,700	41 + over: additional \$15 per each additional year of service		

**BENEFIT / SERVICE SCHEDULE FOR RETIRED ARCHDIOCESAN PRIESTS**  
(Funded primarily through Archdiocesan Benefit Plans and Designated Programs)

**Pension Program**

Retirement Benefit: \$1,850 monthly, \$22,200 annually (effective January 1, 2024)  
Housing Allowance (non-taxable portion of retirement benefit). \$800 monthly,  
\$9,600 annually (effective January 1, 2015)  
Medicare Part B: \$174.70 monthly, \$2,096.40 annually (effective January 1, 2024)

**Insurance**

Health / Dental Insurance: A “Medigap” plan is purchased for all retired Priests through Hartford subsidiaries Benistar for health, and Medco for prescription drugs at no charge to the retired Priest. Dental insurance is similar to the active Priest plan (through UHC) and also at no charge to the retired Priests. Medicare is primary and the archdiocesan group plan is secondary.

**Housing**

Retirement Residence: John Vianney Residence provides spacious, 2-bedroom apartments and garages subsidized by Archdiocese

**Education**

Continued Education: tuition for approved courses taken at Creighton University subsidized in full by Archdiocese and Creighton University

**Retreats**

Archdiocesan retreats: funding available for approved, formally scheduled retreat programs.

**End of Life Issues**

Estate Planning: Archdiocesan Planned Giving Consultant available to discuss retirement planning  
Last Will and Testament: Chancery will safeguard wills and funeral/burial documentation  
Executor: Chancellor or Vicar for Clergy may be named as executor of estate for settlement purposes  
Burial: Grave space, opening at time of burial and headstone provided at the south entrance of Calvary Cemetery

**Consultation**

Delegate for Retired Priests: assists in meeting special needs arising within retirement