



LIGHT THE WAY FORWARD

2024 – 2025
Impact Report



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If we walk in the light, as He is in the light, then we have fellowship with one another, and the blood of his Son Jesus cleanses us from all sin.

1 JOHN 1:7



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Let Your Light Shine Before Others



“The light God placed within you is too important to keep tucked away.”



A Message from EXECUTIVE DIRECTOR STEPHEN CAMERON

Dear Friends in Christ,

The light God placed within you is too important to keep tucked away. It's meant to radiate and brighten the world. Through your generous gifts, prayers and acts of service, your light brought hope to your parish, a Catholic school family, priests and other ministries. For that, we thank you for your generosity, faithful witness and partnership with The Orange Catholic Foundation (OCF).

As the Diocese celebrates its 50th anniversary in 2026, we are doing much more than just honoring history; we're shining a light on it. We are inspired by the fire burning in your soul to elevate our vision, reimagine our approach to giving and **Light the Way Forward** for countless hearts.

Lastly, we are entering into a season filled with opportunity and greater impact, which includes an upcoming leadership change. On July 1, 2026, I will move from OCF's Executive Director to a member of OCF's Board, and Kathleen Hurtt, currently OCF's Executive Vice President, will take over as Executive Director. This continuity in leadership ensures our team will keep growing and serving you, your family and the Church!

We hope the stories and impact reflected in these pages encourage you to stay on this path together. May we follow the Holy Spirit's lead and continue to carry the light of Christ into every corner of our community and beyond.

In loving service to God,

Stephen Cameron
Executive Director | The Orange Catholic Foundation



A Message from **KEVIN VANN THE BISHOP OF ORANGE**

Dear Brothers and Sisters in Christ,

In Scripture, Christ declares Himself as the light of the world, and the radiance of His light is reflected in many ways throughout the Diocese of Orange. As I look back on our Diocese's 50-year history, I see Christ's light shining through you, the generous benefactors, who partner with The Orange Catholic Foundation.

I am profoundly grateful for all that you have done to Light the Way Forward, strengthening the mission of our parishes and Catholic ministries. I see His light in the bright smiles of the young girls and boys you gifted an education at one of our Catholic schools. I see it in the seminarians you help form and retired priests you help care for because your support helps those who have devoted their lives to serving God and His Church.

Together, we have built a strong foundation for our Catholic community in Orange County and beyond. I look forward to seeing what God has in store for us all as we continue to faithfully answer God's call to share his love and light with everyone we encounter.

May God bless you and your families abundantly.

Gratefully yours in Christ,

+ Kevin W. Vann

The Most Reverend Kevin W. Vann, J.C.D., D.D., D.Min.
Bishop of Orange



Our Mission

The Orange Catholic Foundation serves the Roman Catholic community of Orange County through philanthropy and stewarding funds to protect and support ministries which further our beliefs and values in loving service to God.

Our Vision

Relying on the inspiration of the Holy Spirit, The Orange Catholic Foundation is the vibrant center of philanthropy for the Roman Catholic community in Orange County, helping to sustain and enhance the faith life of all those it serves.

PRUDENT CATHOLIC STEWARDSHIP

We ensure all donations are prudently invested in alignment with Catholic teaching and distributed according to donor intent.

CHRIST-CENTERED SERVICE

As a Catholic organization, we respect and reflect the values of the Catholic Church and view our service as a joyful ministry of Christ.

Our Values

LEADERS IN PHILANTHROPY

We inspire and help benefactors realize their philanthropic goals.

ORGANIZATIONAL TRANSPARENCY

We are committed to fully carrying out the wishes of our donors, which includes being transparent about our finances, administration and working relationships.



MEET THE OCF BOARD OF DIRECTORS

Our Board of Directors is comprised of talented and committed lay and religious leaders actively engaged in supporting the mission of the Church throughout Orange County. Individually and collectively, their advice and counsel provide the spark for meaningful initiatives that have a long-lasting impact on our community.



Mr. Richard Crawford
Chair of the Board
Founder & President
Crawford Custom Homes
Our Lady Queen of Angels
Catholic Church, Newport Beach



Reverend Brandon Lopez
Vice-Chair of the Board
Parochial Vicar
St. Kilian Catholic Church,
Mission Viejo



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Partner
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Our Lady Queen of Angels
Catholic Church, Newport Beach



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The Most Reverend Timothy E. Freyer, D.D.
Auxiliary Bishop of Orange



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Catholic Church, Newport Beach



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Mrs. Chi Le Dam
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St. Monica Catholic Church,
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St. Kilian Catholic Church,
Mission Viejo



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Partner
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St. Hedwig Catholic Church,
Los Alamitos



Mr. Jim Normandin
Principal Consultant
Normandin & Associates
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Catholic Church, Newport Beach



Mrs. Brooke Strader
Certified Public Accountant
Wertz & Company, LLP
Our Lady Queen of Angels
Catholic Church, Newport Beach



The Most Reverend Kevin W. Vann, J.C.D., D.D., D. Min.
Ex Officio, Bishop of the Diocese of Orange

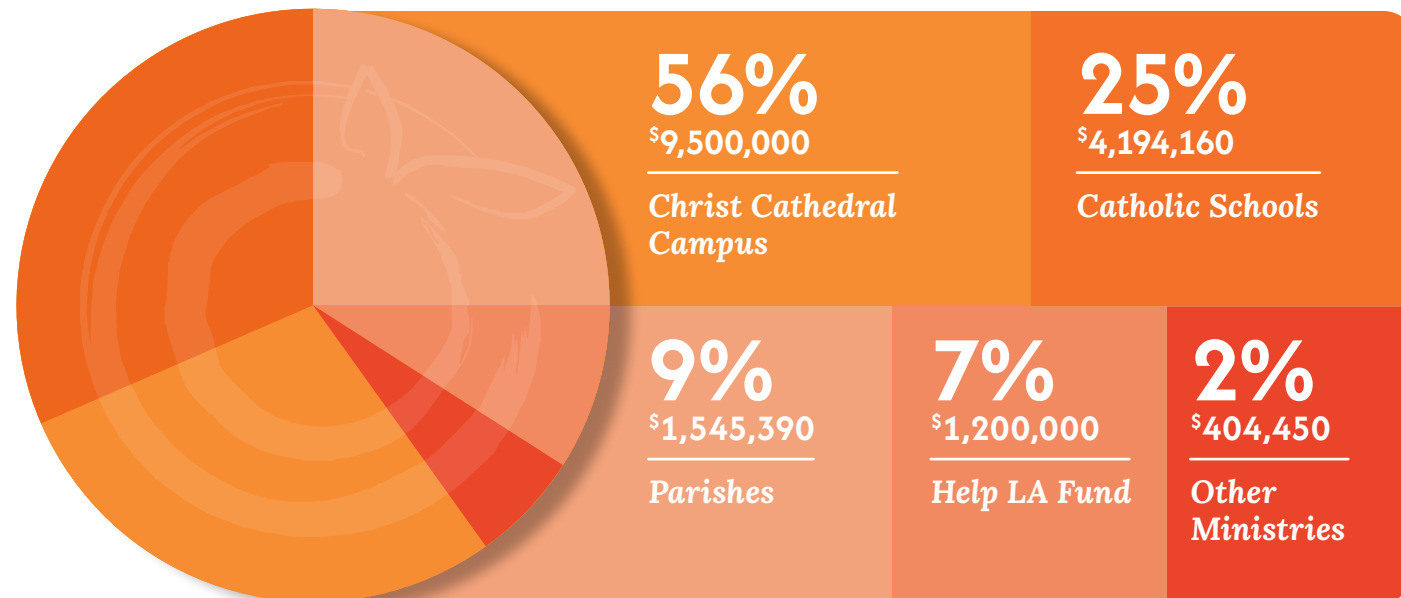


Mr. Stephen Cameron
President & CEO
Foremost Companies
Ex Officio, Executive Director
The Orange Catholic Foundation
Mission Basilica,
San Juan Capistrano

YOUR IMPACT

by the Numbers

Thanks to you, countless lives and ministries were brightened throughout our Catholic community. In the 2025 fiscal year, The Orange Catholic Foundation distributed over **\$16,844,000** in blessings.



Some of the Additional Catholic Ministries & Non-Profit Organizations Supported by Your Generosity

- Knights of Columbus
- Our Lady of Peace Korean Catholic Center
- Catholic Charities of Orange County
- Live Action
- Sisters of St. Joseph of Orange
- St. Francis Home
- St. Mother Teresa of Calcutta Center



LIGHTING THE FUTURE

Through Strategic Giving

Philanthropy can take many forms, and several options beyond cash offer meaningful tax advantages. In the 2025 fiscal year, many of you chose to give in these thoughtful ways.

\$1,228,620

Stock Gifts

\$377,600

IRA Gifts

\$220,000

Real Estate

Real Estate Myth-Busters

Real estate has long been a cornerstone of financial stability and wealth-building. For those who care about giving as much as growing, it can also be a powerful tool for philanthropy. Despite its potential, misunderstandings often keep people from exploring charitable real estate donations. Turn to **page 18** where we shed light on five myths about real estate gifts.



“All good giving and every perfect gift is from above, coming down from the Father of lights, with whom there is no alteration or shadow caused by change.”

JAMES 1:17

A PLACE OF CHRIST FOREVER

Welcoming All Who Come

Built on the foundation of donor support, the Christ Cathedral campus remains a sacred space, evolving to serve as a dynamic hub of faith for the Orange County community. This commitment shines through the recent milestones that mark our journey of growth.



OCTOBER 2024

After over 10 years of renewal, generous benefactors and committed believers celebrated the full conversion of the 34-acre Crystal Cathedral campus into Christ Cathedral, highlighted by the dedication of the St. Callistus Chapel in the undercroft.

Susan Strader, Christ Cathedral Guild Member, offered these words of gratitude to Bishop Kevin W. Vann the night of the dedication:

“Congratulations on bringing the campus to completion. It was a long road, but you were the guiding light.”



JUNE 2025

The Christ-centered interactions that unfold on the ecumenical campus day after day is a beautiful reflection of what Richard “Dick” Pickup envisioned when he supported the transformation of the Crystal Cathedral into Christ Cathedral. Some even call his generous contribution a “game-changer” because it became the largest capital gift ever received by the Diocese of Orange.

Today, every event within the newly renamed Richard H. Pickup Cultural Center, marked by its updated sign, stands as part of his enduring philanthropic legacy in Orange County and beyond.

Visitors to the 13th floor of the Tower of Hope now experience more than panoramic views. They encounter a tribute to faith and generosity. A newly installed plaque honors Kenneth and Nancy Walker, whose early support helped Dr. Robert and Arvella Schuller secure the Garden Grove campus. Their legacy lives on in the “Chapel in the Sky,” an ecumenical dwelling place, which Bishop Vann calls a “beacon of faith, hope and love.”



JANUARY 2025

The latest addition to the campus is *The Shroud of Turin: An Immersive Experience*, a world-class exhibit. Visitors to the museum can view two high-quality and highly detailed replicas of the Shroud, along with three immersive theaters and a series of exhibits detailing the life and passion of Christ. It is located on the second floor of the Richard H. Pickup Cultural Center at Christ Cathedral.



NOVEMBER 2025

Commemorative Opportunities

Donor recognition opportunities on the Christ Cathedral campus are great ways to honor loved ones and give thanks to God. To learn more, contact The Orange Catholic Foundation at info@OrangeCatholicFoundation.org or 714.282.3021.



The Twenty-Second Annual
**CONFERENCE ON
BUSINESS & ETHICS**
A FORUM FOR RESPONSIBLE LEADERS

Voted Again **#1 BREAKFAST** IN ORANGE COUNTY

Thanks to your unwavering support, the 22nd Annual Conference on Business & Ethics was once again recognized by the *Orange County Business Journal* as the region's #1 breakfast. Held on March 19, 2025, fittingly on the Feast of St. Joseph, patron saint of workers, the event brought together leaders from business, faith, education and philanthropy for a day of inspiration, networking and impact.

The guest panelists, Annette Walker, M.H.A., President of City of Hope OC, Kevin Tiber, President of Farmers & Merchants Bank and Oscar Gonzalez, Co-Chief Executive of Northgate Markets, reminded attendees that the workplace isn't separate from your calling. It can be a place of witness, where one can live with integrity and grace.

Without question, the 2025 honorees exemplified that and more. Joe Baldo, founder of Higher Ground Youth & Family Services, and Jim Snyder, Chief Executive Officer at Tidemark Real Estate Services, were recognized with the Bishop's Award for Exemplary Business Integrity. The Farmers & Merchants Bank Lifetime Achievement award was presented to Sr. Johnellen Turner for her 50 years of service to Catholic education, including St. Catherine's Academy in Anaheim.

The morning wrapped up with a keynote address by Jim Wahlberg, who shared his powerful testimony of addiction, prison, an encounter with St. Teresa of Calcutta and his conversion. In total, **nearly \$1,000,000** was raised for Catholic schools in the Diocese of Orange, School Tuition Assistance Endowment and The Orange Catholic Foundation.



“Thanks to the financial assistance I received, I have been blessed with the best Catholic education possible, preparing me for the future God has planned for me.”

– ANABEL G. | ST. BARBARA CATHOLIC SCHOOL GRADUATE



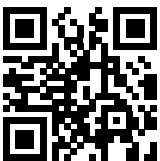
ILLUMINATING CONNECTIONS THAT MATTER

The Orange Catholic Foundation’s Catholic Professional Network has grown into a community where Catholic men and women come to pray, meet, connect and gain fresh insights on how to live out and support the work of the Church in their professional lives. We thank those who attended and supported our events, including our inspiring guest speakers.



“Let’s take care of each other because we are in this together. We are one big Catholic family.”

WING LAM
Co-founder of Wahoo’s Fish Tacos and guest speaker at the January 2025 event



Watch how Jim Wahlberg, producer of the Carlo Acutis film, became a part of an 11-year-old Holy Family Catholic School student’s story at our Catholic Professional Network event in April 2025.



“You are the light. Show the world what it’s all about.”

ROBERT BRIDENBECKER
Former executive producer and vice president of Blizzard Entertainment and guest speaker at October 2024 event



FAITH-DRIVEN • BUSINESS-MINDED • CHRIST-CENTERED

Are you looking to connect more often? The Catholic Professional Network has a new opportunity for you. Faith & Works Business Communities meet once a month to discuss the Gospel and how to apply it to your profession in a more intimate, small group setting. Email [The Orange Catholic Foundation at Info@OrangeCatholicFoundation.org](mailto:Info@OrangeCatholicFoundation.org) to learn more today.



Help LA Fund

DONORS BLESS OVER 500 FAMILIES & Individuals with a New Beginning

When the wildfires swept through Los Angeles County in January 2025, tens of thousands were left without homes or jobs. Without a clear path forward, many of them looked to the Catholic Church as a beacon of hope. With the guidance of their parish and pastor, more than 500 families and individuals received over \$1.2 million in aid from the Help LA Fund.

In partnership with the Diocese of Orange and generous benefactors, OCF established the Help LA Fund shortly after the wildfires broke out. Staying true to the principle of subsidiarity, OCF worked directly with parish staff and volunteers in Los Angeles County to distribute the support.



“Because of you, we didn’t have to start at the very bottom. We didn’t have to worry. Your help gave us a new beginning.”

EFRAIN PEREZ | Family’s Altadena apartment destroyed in the Eaton Fire



“Your generosity has made a world of difference in easing these burdens and helping us focus on Ciaran’s well-being.”

SHANNON NEIMAN | Daughter’s wheelchair and special lift ruined in Palisades Fire



“I was in tears, thanking God that He protected my family.”

LANA | St. Andrew Catholic School student received tuition assistance after the fires

Thank you to all the donors who responded to Christ’s call of compassion, living out Matthew 25:40. All funds in the Help LA Fund have been disbursed making it no longer active. If you would like to assist others affected by tragic events, gifts can be made to the OCF Emergency Relief Fund.



Faith, Family & FINANCES

Charitable giving strategies benefiting you, your family and the Church.

SHEDDING LIGHT ON FIVE MYTHS ABOUT REAL ESTATE GIFTS

Real estate has long been a cornerstone of financial stability and wealth generation. But for those who value giving as much as growing, real estate can also serve as a transformative tool for philanthropy.

Despite its many benefits, misconceptions about donating real estate often prevent people from exploring this powerful form of giving. In this article, we'll debunk common myths and reveal the truth about how faith and finance can unite through charitable real estate donations.

MYTH 01 Only the wealthy can donate real estate.

The Truth: Donating real estate is not limited to the ultra-wealthy. Properties of all types and values can make a significant impact, whether it's a modest rental property or a valuable vacation home. Even a percentage of the property can support causes like Catholic schools, parishes or mission work. In one scenario, a family donated a small piece of undeveloped land to the diocese, which when sold was used to fund a new youth ministry program.

MYTH 02 Charities don't accept real estate donations.

The Truth: Many charitable organizations, especially Catholic institutions, are well-equipped to handle real estate donations. They often have partnerships with real estate experts and financial advisors to

ensure the property is utilized effectively, whether through sale, development or direct use. Make sure to speak directly with your chosen charity to understand their process and capacity for accepting real estate donations.

MYTH 03 The donation process is too complicated.

The Truth: While donating real estate involves several steps, it is manageable with the right guidance. A professional team, including an appraiser, attorney and financial advisor, can streamline the process, from valuation to the legal transfer of the deed. Key steps include:

1. Securing an appraisal to determine market value.
2. Completing the process for a legal transfer of ownership.
3. Obtaining clear documentation for tax purposes.

MYTH 04 You lose all control once the property is donated.

The Truth: Donors often have a say in how their gift is used. For example, you can specify that proceeds from the property's sale fund a particular mission or ministry. It can also be used to establish an endowment and work with the charity to align your gift with your personal vision. In another scenario, a donor specified that their vacation home be transformed into a retreat center for Catholic educators.

MYTH 05 The financial benefits aren't worth it.

The Truth: Donating real estate offers significant financial advantages, including:

- Tax Deductions: The full market value of the property is typically tax-deductible.
- Minimizing Tax Impact: Donors may reduce the tax implications associated with the appreciated value of the property.
- Estate Tax Reduction: Lowering the taxable value of your estate benefits your heirs.

These financial benefits often make donating real estate a win-win for donors and charities alike.



Please note The Orange Catholic Foundation does not provide tax, legal or accounting advice. This material is prepared and made available for informational purposes only.

Dispelling Doubts and Building Legacies

As Pope Francis reminds us, "True power is service. The Church must serve all people, especially the poor, the weak, the vulnerable." Similarly, donating real estate is a powerful way to blend faith and finance, transforming material assets into spiritual impact.

By debunking these common myths, we hope to inspire you to explore this impactful form of giving and leave a legacy that reflects your values. Take the first step today by reaching out to The Orange Catholic Foundation to learn how your property can build a lasting legacy of generosity and faith. Schedule a time to talk with our Catholic philanthropy team at **714.282.3021** or info@OrangeCatholicFoundation.org.



NEW ENDOWMENTS

Opening Doors for Catholic School Students

“These parents are already making a lot of sacrifices to put their children in Catholic school. They just need a little help to stay, and as a priest, that’s the least I can do.”

– FR. SY NGUYEN



Fr. Sy Scholarship Endowment Fund

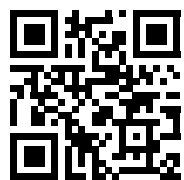
Rev. Sy Nguyen, pastor of Holy Family Catholic Church in Orange, chose to turn his 60th birthday into an opportunity to do good. Rather than receiving gifts for himself on this milestone, he asked his friends and faithful parishioners for their support. With their help, he established a birthday present that will never stop giving, the Fr. Sy Scholarship Endowment Fund.

Managed through The Orange Catholic Foundation, the Fr. Sy Scholarship Endowment Fund will provide annual Catholic school tuition support to children and their families for generations. “We are here to help each other go to heaven. I know many parents will appreciate the aid they receive. I’m a priest partly because of my upbringing through a Catholic school in Vietnam.”

Rodriguez Family Endowment

God surrounds each of us with mentors, and for Juan Rodriguez, it was his parents and one of his Catholic school teachers. Their quiet sacrifices of love, time and finances kept him and his five sisters off the troubled streets of Los Angeles. Now, as a deputy sheriff, Juan has channeled his gratitude into action.

Through the loving support of his wife, Kala, and the faithful partnership of The Orange Catholic Foundation (OCF), the Rodriguez family has established a new scholarship through an endowment fund to help children benefit from the same values-based education that helped shape Juan’s own journey.



With his teary-eyed parents and three of his five children watching from the pews, Juan and Kala, awarded nine students from St. Anne School, in Santa Ana, one of the schools in the Pax Christi Academies network, with the newly established Rodriguez Student Merit Scholarship on May 23, 2025. **Scan to meet the very families whose lives have changed.**



JESUS LOVES YOU BEARS

Brighten the Room

Just before school let out for the summer in 2025, about 75 children from St. Anne, St. Joseph, St. Justin Martyr and La Purisima Catholic Schools, which are all a part of the Pax Christi Academies network, were surprised with a Jesus Loves You Bear.

Thanks to the generosity of donors from the Conference on Business & Ethics and OCF's Catholic Schools Sister Parish Initiative, students received these comforting reminders of Jesus' constant presence, inviting them into His love and inspiring them to shine His light in their communities.





High School Sweethearts Use IRA to Fulfill New Year's Resolution

For Gene and Judy, a blind date at a drive-in theater more than 65 years ago led to marriage and family. It was a second “blind date”—or rather an unexpected visit from a priest and The Orange Catholic Foundation (OCF) that reinforced their New Year’s resolution to “get serious” about philanthropy.

Motivated by the decline in faith in society and the desire to bring others to Christ, the couple, who attends Our Lady of Fatima Catholic Church in San Clemente, recently

named their parish and OCF as beneficiaries on their Individual Retirement Account (IRA). Gene said it just made sense: *“If the 10% tithing guideline is good enough while you’re alive, then why not use it as a guideline when you die?”* (Leviticus 27:30, Genesis 28:20–22)

Gene, confirmed Catholic in 2021, and Judy, a Mater Dei High School alumna, also chose this charitable path to avoid income tax consequences for their loved ones. He stated, *“If you are in an estate tax situation*

when you leave your IRAs to your family, they are double taxed basically. Where the church gets it at 100% value.”

Gene and Judy hadn’t considered the IRA beneficiary giving strategy until the doorbell rang in December 2023. The holiday visit with Rev. Scott Borgman, former Our Lady of Fatima Catholic Church Parochial Vicar, and OCF’s Charitable Strategy Officer, Anthony Vultaggio, sparked a series of philanthropic conversations, renewing Gene and Judy’s love for their Catholic faith and inspiring them to get more involved in parish life.

Fr. Scott shared, *“Everything God gives us is meant to be shared. Part of that is making an investment with what God has given you through what you have now and even what you may have at the end of your life.”*

Did you know your IRA could also make a transformational impact today?

Qualified Charitable Distributions (QCDs) are another powerful way for IRA owners aged 70½ and older to make tax-free gifts directly from their retirement accounts. Unlike traditional IRA withdrawals, which are taxed as income, QCDs bypass the donor’s taxable income entirely. For those aged 73 and older, QCDs also count toward Required Minimum Distributions (RMDs).

The benefits of giving through OCF go far beyond tax advantages and charitable impact. Donors can streamline their giving by using a QCD to support multiple organizations. This approach not only simplifies the process, but also significantly reduces the volume of mail and solicitations donors typically receive.

Gene and Judy quickly realized the importance of having a philanthropy officer as part of their advisory network. With the help of Vultaggio, they explored several non-cash giving options and decided that updating their IRA beneficiary listings would be best.

“My dad instilled in me: save, save, save. So, I always had the maximum amount put into my retirement plan,” said Gene, a retired engineer and real estate investor. The couple humbly joked that their IRA beneficiary designation gifts “are not a Bill Gates number but it is enough to pay the light bill” and will support those who are “doing a lot of good work” for the Catholic Church, healthcare and the homeless.



Scan the QR code to download our QCD donation form today.

LIGHTING THE LEGACY PATH

Have you considered the countless ways your parish has blessed you? One late parishioner of St. Anthony Claret Church in Anaheim reflected deeply and responded by leaving more than \$240,000 to the Church in his trust. Thanks to Bruce Beuhner's remarkable contribution, new stained-glass windows and doors will grace the parish, welcoming thousands who will pass through and pause in prayer for years to come.



Rev. Bill Cao, pastor, (pictured in center) is grateful for Beuhner for remembering St. Anthony Claret Catholic Church in such a special way.



Guided by Grace Workshops

To help people recognize God's plan for their life, family and God-given blessings, The Orange Catholic Foundation hosted a series of *Guided by Grace* Estate Planning Workshops in collaboration with Laura Meier, Esq. The Catholic mother, attorney and nationally recognized author shared with parishioners, including those at St. Kilian Catholic Church in Mission Viejo, practical ways to:

- protect loved ones from lengthy and costly court proceedings
- safeguard the resources God has entrusted to them
- live generously
- ensure they receive the medical and spiritual care they deserve
- create a meaningful legacy that reflects the values they uphold today

Light of Christ Legacy Society



The Orange Catholic Foundation's Light of Christ Legacy Society brings together an exclusive group of men and women who have chosen to let their Catholic faith and values illuminate the future. By choosing to include their parish, Catholic school or favorite ministry in their estate plans, members enjoy:

- an exclusive gathering with the Bishop of Orange.
- helpful updates on planning strategies for their families.
- invitation to meet others who are committed to living out their Catholic values for generations to come.

Are you eligible for membership? Would you like to learn more about this distinguished group? We'd love to hear from you and warmly welcome you into the Light of Christ Legacy Society.



In April 2025, we welcomed three new individuals into the Light of Christ Legacy Society during a special Mass in the St. Callistus Chapel and luncheon with Bishop Kevin Vann.

MOMENTS THAT LIT THE WAY

FEBRUARY 2025

Leaders from parishes and schools across the Diocese convened on the Christ Cathedral campus for OCF's Annual Investment Meeting. Together, they explored innovative ways to strengthen ministries, support their communities and collaborate with OCF to help the light of our Catholic faith shine even brighter.



APRIL 2025

Made possible by a generous donor, a private screening of *Carlo Acutis: Roadmap to Reality* brought guests together for an unforgettable evening. Producer Jim Wahlberg joined the group for a post-film discussion, and attendees were offered the opportunity to venerate a relic of St. Carlo Acutis, the first millennial to be canonized.



APRIL 2025

From *Women & Wealth* to the *Wisdom of the Proverbs 31 Woman*, The Orange Catholic Foundation welcomed women of all generations and backgrounds for a series of inspiring talks. The events hosted at Solano, St. Thomas More and St. Martin de Porres Catholic Churches were designed to cultivate financial confidence and spiritual strength.



MAY 2025

A heartfelt thank-you to everyone who joined us for our Gathering in Gratitude events at Our Lady of Guadalupe, Solano and St. Nicholas Catholic Churches. Parishioners came together to share time with their pastor, deepen community bonds and learn how partnering with The Orange Catholic Foundation can help their parish mission come to life.

Four Reasons PARENTS GIFT STOCK to St. Joachim Parish

As many families know, sticking to a monthly budget is essential—not just for putting food on the table, but also for covering education costs, extracurricular activities for the kids and anything else that may come up. For one St. Joachim Catholic Church and School family, the story is no different, which is why they started evaluating creative ways to support their parish in Costa Mesa.

01 Moved by gratitude, the anonymous donors generously contributed stock as a year-end gift to St. Joachim Catholic Church saying, “We’ve really come to appreciate the faith-filled component we’ve received from attending Mass and what our children get in their daily education. We’ve seen these teachings come to fruition in our kids.”

02 The parents have imparted another valuable lesson to their children: use your gifts to glorify God. Following an unexpected financial gain, the couple chose to give from their appreciated assets, providing meaningful support to their parish, inspiring generosity in their children and maximizing their tax benefits. “Jesus looked for ways to serve others. If you leverage your talent, financial support or time, it is the purest way to thank God for what He has done and follow Jesus’ example as closely as we can,” the mother shared.

03 By donating stock before selling it, donors can bypass federal and California capital gains taxes. This means the stock’s value goes directly to the parish instead of being lost to taxes. Additionally, donors can qualify for a charitable deduction based on the full market value, potentially lowering their taxable income.

The anonymous parishioner empathized, “For people who have never done it before, it sounds complex, but it’s not. Once I was directed to The Orange Catholic Foundation (OCF) and got the stock donation form to my stockbroker, they processed the transaction.”

04 For Rev. Robert Capone, pastor, this stock gift was a great surprise and the first one he received since being appointed to St. Joachim. “I am quite grateful. They understand the importance of community in raising a child and are investing in one of the greatest gifts for their children—their faith.”

The \$40,000 donation was allocated to the general fund to sustain the parish’s daily liturgies and ministries, reflecting the family’s desire to help the parish grow, strengthen its financial stability and invest in its parishioners. Fr. Robert explained, “Without these unrestricted gifts, the collection itself probably wouldn’t be enough. We rely on special gifts to fund our mission.”



Rev. Robert Capone is grateful for a stock donation made by one of his generous parishioners. Kathleen Hurtt, OCF’s executive vice president, had the honor of delivering the contribution on behalf of the donor.



Interested in donating stock through The Orange Catholic Foundation to benefit your parish, a Catholic school or other Catholic ministry? You can start by downloading our donation form today!



Faith, Family & FINANCES

Charitable giving strategies benefiting you, your family and the Church.

INCOME FOR LIFE, LEGACY FOR GENERATIONS: BENEFITS OF CHARITABLE GIFT ANNUITIES

What if you could secure income for your lifetime while simultaneously creating a legacy for the causes you care about most? Charitable gift annuities (CGAs) provide a unique opportunity to do just that. By blending financial security with philanthropy, CGAs allow individuals to support their faith-based values and the mission of charitable organizations.

How Charitable Gift Annuities Work

A charitable gift annuity is a contract between you and a charitable organization. You make a one-time donation of cash, securities or other assets, and in return, the charity provides you with fixed payments for the rest of your life. After your lifetime, the remaining funds are used to support the charity's mission.

Key features include:

- **Fixed Lifetime Income:** Payments are predetermined and guaranteed for life, providing financial stability.
- **Flexibility Funding Options:** CGAs can be funded through various assets, such as cash, stocks or even real estate.
- **Charitable Impact:** Upon your passing, the remainder of the gift benefits the chosen charity, leaving a legacy.

The Dual Impact: Income for You, Legacy for Others

Charitable gift annuities have gained popularity in part because of the dual benefits they provide.

Donor Benefits:

1. **Financial Stability:** Receive predictable income during retirement years.
2. **Tax Advantages:** Enjoy immediate income tax deductions and favorable tax treatment on annuity payments.
3. **Peace of Mind:** Secure lifetime payments while aligning your assets with your values.

Charity Benefits:

1. **Support for Mission-Driven Work:** Your gift directly supports the initiatives of a Catholic parish, school or mission of another Catholic charitable organization.
2. **Long-Term Sustainability:** CGAs often provide predictable financial support to charities, helping them plan for growth.
3. **Spiritual Legacy:** Your contribution reflects your faith and commitment to stewardship for years to come.



Practical Considerations

1. **Eligibility:** Typically, CGAs are available to donors aged 60 and above, but that is dependent on the charitable organization.
2. **Payout Rates:** Payments are based on your age and the size of the gift, with older donors receiving higher payout rates.
3. **Reputable Charities:** Work with established charities that align with your values and have experience managing CGAs.
4. **Tax Planning:** Consult a tax advisor to maximize the financial benefits and ensure compliance with IRS regulations.

Real-World Example

Consider Mary, a retired teacher with a passion for Catholic education. She donated \$100,000 to fund a charitable gift annuity through her local diocese. In return, she receives annual payments that supplement her retirement income. After her lifetime, the remainder of her gift will provide scholarships for underprivileged students at Catholic schools.

A Faith-Based Perspective

Charitable gift annuities embody the Catholic principles of stewardship, generosity and care for others. By design, these vehicles provide a unique opportunity to combine financial security with impactful giving. By securing income for life and supporting charitable organizations, you create a dual legacy that benefits both you and the causes you hold dear.

As Pope Benedict XVI once said, “The world needs to rediscover that all human activity is moral in nature and must be measured against the ultimate good.” CGAs allow you to steward your resources for the ultimate good, providing for yourself and advancing the mission of Christ. Take the first step toward building your legacy by scheduling a time to talk with a member of The Orange Catholic Foundation’s philanthropy team. Reach out to us at 714.282.3021 or info@OrangeCatholicFoundation.org.

Please note The Orange Catholic Foundation does not provide tax, legal or accounting advice. This material is prepared and made available for informational purposes only.

MEET THE OCF STAFF

Eager to serve you and share their expertise for the benefit of you, your family and the Church.



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Executive Director
Mission Basilica,
San Juan Capistrano



Kathleen Hurtt

Executive Vice President
St. Joseph Catholic Church,
Placentia



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Philanthropy
Administrative Assistant
Our Lady Queen of Angels
Catholic Church, Newport Beach



Karen Nguyen

Data/Office Clerk
Our Lady of La Vang Catholic
Church, Santa Ana



Clark Tesoro

Data/Office Clerk
Christ Cathedral,
Garden Grove

July 1, 2024 – June 30, 2025

STATEMENT OF FINANCIAL POSITION

ASSETS	6/30/2025
Cash and Cash Equivalents	\$3,697,500
Prepaid Expenses and Other Assets	\$210,916
Investments	\$73,420,431
Pledge Receivable, net	\$274,885
Property and Equipment	\$7,279
Right-of-Use Assets	\$229,584
TOTAL ASSETS	\$77,840,595
LIABILITIES AND NET ASSETS	
LIABILITIES	
Accounts and Grants Payable and Accrued Liabilities	\$1,576,185
Lease Liabilities	\$230,091
Deferred Contributions	\$82,333
Total Liabilities	\$1,888,609
NET ASSETS	
Without Donor Restrictions	\$5,021,607
With Donor Restrictions	\$70,930,379
TOTAL NET ASSETS	\$75,951,986
TOTAL LIABILITIES AND NET ASSETS	\$77,840,595

July 1, 2024 – June 30, 2025

CONDENSED STATEMENT OF ACTIVITIES AND CHANGE IN NET ASSETS

REVENUE AND SUPPORT	6/30/25
Campaign Contributions	\$2,987,702
Event Revenue	\$605,452
Service Revenue from Related Party	\$1,090,253
Transmission Capacity Lease Income	\$597,822
Investment Income	\$2,321,529
Realized and Unrealized Gain (Loss) on Investments	\$5,598,532
TOTAL REVENUE AND SUPPORT	\$13,201,290
EXPENSES	
Grant and Other Program Services	\$15,054,709
Supporting Services	
General and Administrative	\$944,618
Fundraising	\$747,016
Total Supporting Services Expenses	\$1,691,634
TOTAL EXPENSES	\$16,746,343
CHANGE IN NET ASSETS	(\$3,545,053)
NET ASSETS, BEGINNING OF YEAR	\$79,497,039
NET ASSETS, END OF YEAR	\$75,951,986

Donor Recognition

The donors recognized here gave through The Orange Catholic Foundation from July 1, 2024 to June 30, 2025, to strengthen their parish, Catholic education, local ministries or the Diocese of Orange. Thank you for your generosity and for living out your faith through charitable giving.

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“No one who lights a lamp conceals it with a vessel or sets it under a bed; rather, he places it on a lampstand so that those who enter may see the light.” — LUKE 8:16

† In Loving Memory. May they rest in eternal peace and may perpetual light shine upon them.

“The Lord is my light and my salvation; whom should I fear? The Lord is my life’s refuge; of whom should I be afraid?” – PSALM 27:1



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† In Loving Memory. May they rest in eternal peace and may perpetual light shine upon them.

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† In Loving Memory. May they rest in eternal peace and may perpetual light shine upon them.

“The lamp of the body is your eye. When your eye is sound, then your whole body is filled with light, but when it is bad, then your body is in darkness.” – LUKE 11:34



The Orange Catholic Foundation, joined by the Sister Parish Initiative's generous supporters, delivered a \$394,000 check to the Pax Christi Academies in August 2024 to help kick off the program's second year.



Both current and former OCF board members were given a private tour of the St. Callistus Chapel, in the undercroft of Christ Cathedral, before it was dedicated in October 2024. Pictured from left to right: John Heffernan, Lucy Dunn, Fr. Christopher Smith, Michael Murphy, Richard Crawford, Mark Doyle, Fr. Bao Thai and Jim Normandin.



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Mr. and Mrs. Al Villanueva



“No longer will your sun
set, or your moon wane;
For the Lord will be your
light forever.”
— ISAIAH 60:20

† In Loving Memory. May they rest in eternal peace and may perpetual light shine upon them.

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Santiago Retreat Center
Servite High School
Sisters of St. Joseph of Orange

St. Cecilia Catholic School
St. Edward the Confessor
Catholic Church
St. John Neumann Catholic Church
St. John the Baptist Catholic Church
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- South Dakota
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Withum

“For so the Lord has
commanded us, ‘I have
made you a light to the
Gentiles, that you may
be an instrument of
salvation to the ends of
the earth.’ – ACTS 13:47



Servite High School alum Brandon Bass received the 2025 Zug Cup Award, with OCF proudly supporting and presenting his college scholarship. Also pictured: MLB legend Mike Scioscia.



Congressman Lou Correa and Steve Pellegrini, Chief Financial & Administrative Officer for the Diocese of Orange, attend the 22nd Annual Conference on Business & Ethics.

† In Loving Memory. May they rest in eternal peace and may perpetual light shine upon them.

Let Your Light Shine Before Others

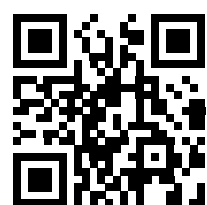
Just as the light near the tabernacle never fades, we are called to keep our own light bright, reflecting God's love to those around us. Whether it be through your time, talent or treasure, The Orange Catholic Foundation is here to help you fulfill that call. Here are a few ways you can shine.

“Nor do they light a lamp and then put it under a bushel basket; it is set on a lampstand, where it gives light to all in the house.” — MATTHEW 5:15



Let's Talk!

Would you like us to collaborate with your trusted CPA, financial advisor or attorney to align your faith with your finances? We'd be honored to support you. *Think it would be nice to have a charitable giving workshop or an estate planning seminar at your parish?* The Orange Catholic Foundation would be delighted to make that possible.



Scan the QR code to set up a time to connect.



Join Our Catholic Professional Network

Work is more than just a job, it's a vocation. Whether it is a warm smile at a co-worker or a conversation with a client, your profession presents an opportunity every day to show others the light of Christ. Our Catholic Professional Network opens up a pace for you to intermingle with others and exchange fresh ideas.

We hope you will join us at our next event. Details are available on [OrangeCatholicFoundation.org](https://www.OrangeCatholicFoundation.org).



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Looking for inspiration from fellow believers and staying connected to your Catholic community? Subscribe to OCF's monthly eNewsletter or follow us on your favorite social media platform for real-time, motivational Catholic content.

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The Orange Catholic Foundation (OCF) works with donors and their trusted advisors to evaluate giving strategies that align with their goals, maximizing tax benefits, creating tax-advantaged passive income, advancing the mission of the Church and fostering meaningful conversations with their loved ones. Additionally, our services allow the clergy, staff and volunteers of their parish or favorite ministries to dedicate more time to their mission and work.

As a 501(c)(3) charitable corporation, OCF serves as an all-in-one resource for donors to support their parish, Catholic education, priest retirement and other Catholic ministries close to their heart. As Catholic philanthropic partners, we are committed to making charitable giving easy!

Exploring the Benefits of STRATEGIC GIVING

Understanding charitable giving strategies can help donors choose the most tax-efficient way to support Catholic causes and provide for their family.



Stocks and Securities:

Donors can avoid paying capital gains tax on the appreciation and receive a charitable deduction for the full fair market value of the asset.



Real Estate: Donating all or part of appreciated real estate can offer a dual tax benefit: it helps avoid capital gains tax and lets donors claim a deduction based on the property's current market value.



Home: With a life estate gift, donors can enjoy the benefits of giving their home to charity while still living in it. Not only can it potentially provide donors with income tax deductions, but it can also help reduce the taxable value of their estate.



Business: Donating all or part of a business before the sale can support a Catholic cause, eliminate capital gains tax and gives donors a fair market value deduction, benefits they would miss by selling first and donating later.



Retirement Assets: If donors are 70½ or older, they can make a Qualified Charitable Distribution (QCD) from their IRA directly to a charity, avoiding taxes. At age 73, they can fulfill all or part of their Required Minimum Distribution (RMD) without paying income taxes.



Bequests: Including a gift to a Catholic charity in a will and trust can provide an estate tax deduction and ensure that donors create a legacy that supports their faith.



Charitable Gift Annuities (CGA): Donors and a qualified charity create a contract that provides the donors with a fixed income for life in exchange for a donation.



Endowments: A permanent fund where the principal is invested and a portion of the funds are spent or reinvested.



Donor-Advised Funds (DAF): By funding a DAF, donors can take advantage of income tax deductions now, while having the flexibility to decide later when, how and who to support. Plus, the money in a DAF is invested, so it has the potential to grow over time.



Life Insurance: Donors can simply name the charity as a beneficiary on an existing policy or take out a new policy with the Church as the owner and beneficiary. By paying the premiums to the Church, donors can receive a yearly deduction.

Other Ways to GET INVOLVED



Catholic Professional Network

The Orange Catholic Foundation's Catholic Professional Network provides a space for finance professionals, attorneys, CPAs, real estate brokers and many others to intermingle with value-driven men and women who are looking to advance the work of the Church. Members get the opportunity to attend Mass, network and discover new ways to live out their faith both personally and professionally.



Light of Christ Legacy Society

The Orange Catholic Foundation's Light of Christ Legacy Society recognizes those who are leaving a legacy in their estate plans with OCF benefiting a parish, Catholic school, ministry or the Diocese of Orange. Members receive invitations to annual gatherings with the Bishop of Orange, updated information on tax planning and the joy of having their Catholic values live on for generations.

If you have any questions or would like more information, contact The OCF philanthropy team at 714.282.3021 or info@OrangeCatholicFoundation.org.

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