



**CATHOLIC FOUNDATION**  
of West Michigan

### Endowed Fund Report

At the Catholic Foundation, we want to help promote the good you are doing through your endowment by sharing your stories. Quite possibly the most powerful tool we have to build connections and affect hearts is through storytelling. They give us the power to connect emotionally on our shared values and to see God's hand at work in our lives. All organizations who take a distribution from their endowment are encouraged to report – both to the Foundation and to your parishioners – how the funds were used to impact your mission. We should share these stories because:

- They are a celebration of your mission and ministry
- They provide evidence of your vitality and impact
- They provide transparency that the funds are being used for their intended purpose
- They inspire donors to (continue to) financially support your ministry
- They are crucial for effective donor stewardship

Your stories may be featured in the Foundation's annual report, print or e-newsletters, and/or on social media. Please complete this form for each endowed fund that took a distribution.

**Parish/School Name:** \_\_\_\_\_ **City:** \_\_\_\_\_

**Fund Name:** \_\_\_\_\_ **Account #:** \_\_\_\_\_

**Distribution Amount Taken:** \$ \_\_\_\_\_

#### Sharing the Impact:

Attach a brief summary of how the funds were used in accordance with the fund's purpose. A fully developed story is not necessary. This information will be used by Foundation – and hopefully parish staff – for further development. Considering the following questions may help your response:

- How were the funds used?
- Who benefitted from the distribution?
- Did the distribution sponsor or underwrite a particular event, program, or ministry?
- If the funds went toward tuition assistance, can you highlight a particular student/family? Names may be altered if the student/family would like to remain anonymous.
- How was the endowment a blessing that served a particular need or improved/expanded a service?
- If your endowment's purpose is as broad as "supporting the general operation of the parish" and the distribution simply goes "toward the bottom line," identify a story within the past year that best reflects your parish's vitality? What is "brag-able" that you want others to be proud of?

Photos are encouraged. If you have photos to go along with your summary, please attach them.

## ENDOWED FUND REPORT

Quote from the pastor, a staff member, or parishioner on how the distribution made an impact.

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We strongly encourage you to share your endowment's impact with your parish and/or school community. If you have shared or plan to share this information, please let us know.

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### Contact information:

Contact Name: \_\_\_\_\_ Title: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Email: \_\_\_\_\_

Thank you for completing this report. By sharing these stories, we are acting as good stewards of our resources, which can inspire greater generosity in others to advance your mission.

### For Internal Use Only:

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

Used: \_\_\_\_\_