

*Faith In Our Future Trust*

Dear Friends,

By now you know of the *Faith In Our Future* Capital Campaign and the important contributions it will make to Catholic education and faith formation in southeastern Wisconsin. What you may not know about is the structure that has been put in place to safeguard donations to the campaign so that they will be used solely for the purposes intended by donors.

The undersigned are the volunteer Trustees of the *Faith In Our Future Trust*, a trust created separately from the Archdiocese of Milwaukee for the sole purpose of receiving and administering campaign contributions. Pursuant to the terms of the governing trust agreement, funds donated to the *Faith In Our Future* Capital Campaign will be used solely for the items outlined in the campaign brochure, the respective parish case statements, and the administration of the trust. The terms of the trust prohibit the use of trust assets for purposes not authorized in the governing trust agreement – that is, the trust is designed to receive only restricted gifts. The Trustees are not permitted to use donations to discharge general obligations of the archdiocese or any parish.

More information on the *Faith In Our Future Trust* is contained in the enclosed information piece. It is our hope that this letter and the accompanying information piece will allay any concerns you may have about how your donation to the *Faith In Our Future* Capital Campaign will be used.

Yours in Christ,

  
Archbishop Timothy M. Dolan

  
Bishop Richard J. Sklba

  
Bishop William P. Callahan

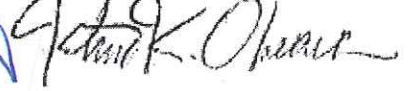
Bruce G. Arnold



Joseph D. Kearney



Kristine K. O'Meara



Mary Ellen Stanek



**Board of Trustees:**

Archbishop Timothy M. Dolan  
Bishop Richard J. Sklba  
Bishop William O. Callahan  
Mr. Bruce G. Arnold  
Mr. Joseph D. Kearney  
Ms. Kristine K. O'Meara  
Ms. Mary Ellen Stanek

P.O. Box 070504  
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# FAITH

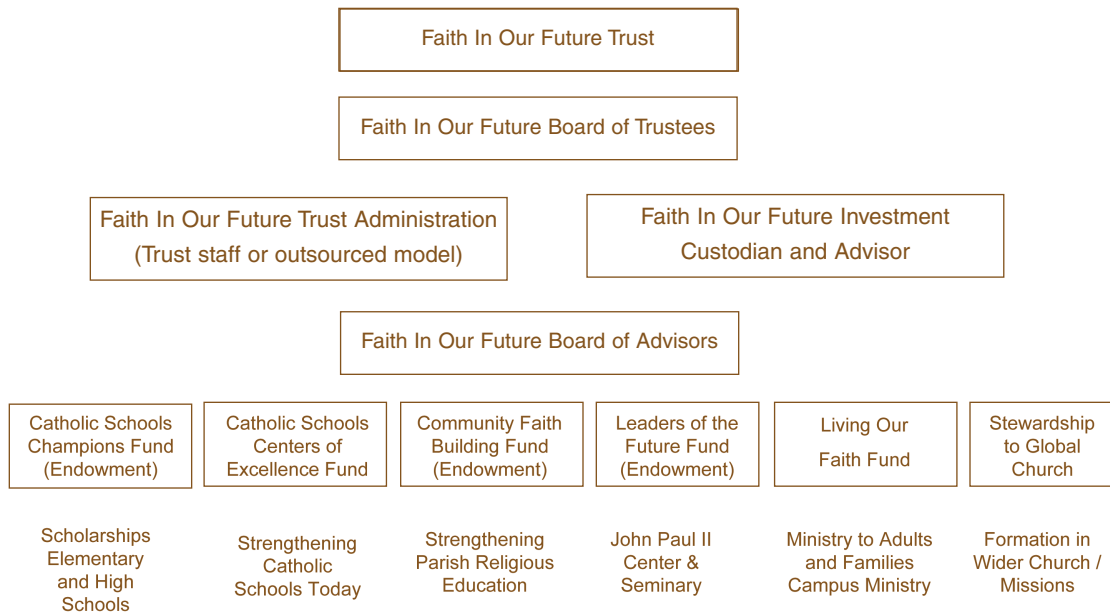
IN OUR FUTURE

## FAITH IN OUR FUTURE TRUST

- Monies donated to the *Faith In Our Future* Campaign will be used solely for the items outlined in the campaign brochure and for the administration of the trust that receives donations.
- A *Faith In Our Future* Trust has been established to hold the campaign proceeds. This trust is a separate legal entity and is not part of the Archdiocese of Milwaukee. The terms of the trust restrict the Trustees from using trust assets for purposes not authorized in the governing trust agreement. This trust agreement is specific to the Catholic education and faith formation initiatives outlined in the *Faith In Our Future* Campaign and funds can be used for no other purposes.
- The Trust will make disbursements to parishes on a monthly basis, as appropriate to each parish campaign. Disbursements for other campaign initiatives will be made in accordance with individual fund criteria and established application and granting guidelines.
- A Board of Trustees, consisting of Archbishop Timothy Dolan, Bishop Richard Sklba, Bishop William Callahan, Bruce Arnold, Joseph Kearney, Kristine O'Meara and Mary Ellen Stanek, will have fiduciary responsibility for the administration of the Trust.
- The Board of Trustees will be responsible for establishing investment policies and for employing and monitoring the performance of investment managers and trust administrators.
- A Board of Advisors, appointed by the Board of Trustees, will have oversight responsibility for making recommendations on fund disbursements. Only the Board of Trustees can approve fund disbursements.
  - † The Board of Advisors will be comprised of active, respected Catholics living and working in the Archdiocese of Milwaukee who, as a group, possess the leadership experience and subject-matter expertise to help ensure the Trust is a model of sound stewardship.
  - † The Board of Advisors will recommend disbursements to the Board of Trustees; recommend standards of accountability for recipients; and promote additional fund development so the trust funds grow.
- The present intent is that the assets of the *Faith In Our Future* Trust will be managed via a contract with the Catholic Community Foundation.

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*More on reverse side.*

*Jesus Christ: the same yesterday, today, and tomorrow.*



**THERE WILL BE SIX FUNDS, INITIALLY, IN THE FAITH IN OUR FUTURE TRUST:**

- + ***Catholic School Champions Endowment Fund***, an endowed fund with an initial goal of \$11 million, established for providing tuition assistance for elementary and high school students. Fund disbursements would begin when the fund reaches \$5 million.
- + ***Community Faith Building Endowment Fund***, an endowed fund with an initial goal of \$5 million, established for the support of parish programs and training initiatives. Fund disbursements would begin when the fund reaches \$3 million.
- + ***Leaders of the Future Endowment Fund***, an endowed fund with an initial goal of \$5 million, established for the formation of seminarians and permanent deacons and for training lay ministers. Fund disbursements would begin when the fund reaches \$3 million.
- + ***Catholic Schools Centers of Excellence Fund***, a non-endowed fund with a goal of \$6.85 million, held in trust for initiatives to strengthen schools, increase academic performance and provide

upgrades to facilities, infrastructure and technology. Funds would be distributed over a three to five-year period.

- + ***Living Our Faith Fund***, a non-endowed fund with a goal of \$3.5 million, held in trust for initiatives to enhance adult formation programs, expand Catholic Campus Ministry, and bolster the program offerings of the Nazareth Project, including Respect Life programming. Funds would be distributed over a three to five-year period.
- + ***The Global Faith and Education Fund***, a non-endowed fund with a goal of \$1.65 million, held in trust for sharing gifts to address formation and education needs within the wider Church outside the geographic boundaries of the Archdiocese of Milwaukee. Funds would be distributed over the five years of the campaign.
- The Board of Trustees will utilize subject-matter experts and members of the Board of Advisors to establish criteria and processes for fund disbursement.

For more information contact Debra Lethlean, 414-769-3322.