Building a strong foundation for the future of the Catholic Church in Vermont.
The Vermont Catholic Community Foundation (VCCF) is enjoying a period of robust growth, strong momentum, and positive results. Based on Bishop Coyne’s experience with a similar foundation in Indiana, the VCCF was created to provide a central, efficient vehicle for the management of the many disparate endowments and funds supporting missions across the Vermont Diocese. It also is intended to encourage the creation of new funds to further Catholic initiatives. Since its inception less than four years ago, the foundation has grown to over $17 million with nearly 70 different funds. The board has been carefully grown to include representation from across the state. The outside professionals managing the funds have consistently delivered above their benchmarks. The foundation has consistently met its budget projections and has become self-supporting, requiring no financial support from the Diocese.

Jon Pizzagalli
VCCF Board Chair

“The Vermont Catholic Community Foundation (VCCF) is enjoying a period of robust growth, strong momentum, and positive results. Based on Bishop Coyne’s experience with a similar foundation in Indiana, the VCCF was created to provide a central, efficient vehicle for the management of the many disparate endowments and funds supporting missions across the Vermont Diocese. It also is intended to encourage the creation of new funds to further Catholic initiatives. Since its inception less than four years ago, the foundation has grown to over $17 million with nearly 70 different funds. The board has been carefully grown to include representation from across the state. The outside professionals managing the funds have consistently delivered above their benchmarks. The foundation has consistently met its budget projections and has become self-supporting, requiring no financial support from the Diocese.”

Jon Pizzagalli, Chair
Rev. Msgr. John McDermott, Treasurer
Ellen Kane, Secretary/Executive Director

John Conlon
Richard Cote
Bethany Dubuque

Elizabeth Fitzgerald
Anita Gervais
Rev. William Giroux
Cynthia Gubb
David Mount
Brigette White

Fund Overview and Distribution

<table>
<thead>
<tr>
<th>INVESTMENTS</th>
<th>$17,689,801</th>
</tr>
</thead>
<tbody>
<tr>
<td>FUNDS</td>
<td>62</td>
</tr>
<tr>
<td>DISTRIBUTIONS</td>
<td>$737,418</td>
</tr>
</tbody>
</table>

The Vermont Catholic Community Foundation is a registered 501(c)3 non-profit organization, and all donations received are fully deductible for tax purposes: #81-0999457.
Dear Friends,

The growth of the Vermont Catholic Community Foundation has been nothing short of miraculous as we have more than tripled the number of funds in the last three years to support our schools, parishes, ministries and charity for the most vulnerable. Our motto is “With God all things are possible,” and it is that faith and the generosity of the Catholic community that form the foundation for this growth.

The generosity of people in our community is inspiring: People have established funds to support new mothers and their babies, scholarships to ensure access to Catholic education for those in financial need, dentures and other gaps in healthcare, emergency aid, parish operations, vocation expenses and more.

At the end of our fiscal year, we had 62 funds supporting cemeteries, ministries, parishes, schools and charitable causes in almost every region of the state. Today, we are close to 70 funds with more room to grow. Each fund can be used only for its intended purpose; that’s why it is important for every school, parish and ministry to have its own fund that can support its mission in perpetuity. We also have been blessed with several legacy gifts that are an amazing way to have an enormous impact on the viability of a ministry in the future.

The future of the Catholic Church in Vermont is in the hands of the people in the community. Based on the strong foundation we are building together; the future is looking bright.

With gratitude,

Ellen Kane

Bishop Christopher J. Coyne,
President

Dear Brothers and Sisters in Christ,

One of my first priorities when I was installed as 10th Bishop of Burlington was to create a Catholic foundation, separate from the Diocese, to support the apostolic ministries of the Church in Vermont now and in the future. In doing so, I hoped to engage the community and provide them with another means to support the ministries that matter most to them and leave a legacy of faith for the next generation. Additionally, this foundation reflects the core values of our faith not only in mission, but also in our investment strategies, by adhering to the ethical investment guidelines of the United States Conference of Catholic Bishops.

The recent synod document, “Christ Our Hope,” was written based upon input of thousands of Catholics from every parish in our state. This input overwhelmingly called for the continuing support of vibrant parishes, a significant focus on evangelization, and a prioritizing of faith formation in Catholic education and youth and adult formation. The foundation will be one way we can support these initiatives now and in the future, as we work as a Diocese to implement these priorities.

I am grateful for the positive response by the community, schools, parishes and the board of directors who have embraced this new initiative and grown the foundation so quickly over the last three years.

May we continue to be blessed by the generosity of the Catholic community.

Yours in Christ,

Most Reverend Christopher J. Coyne,
Bishop of Burlington
Purpose

To provide pathways for Catholics to leave a legacy that will shape the future of the Catholic Church in Vermont.

About

Incorporated in December 2015, Vermont Catholic Community Foundation is a non-profit 501(c)3 separate from the Roman Catholic Diocese of Burlington, and all funds are separate. The foundation supports Catholic and other social service programs across the state that align with the mission and social teachings of the Church at the direction of donors. The foundation responds to the needs of Catholic donors by offering more choice about what they want to fund and investments that reflect the faith. In addition, the foundation offers a menu of giving options such as bequests, endowments, trusts, charitable gift annuities, insurance and specialty assets.

Benefits

• Investments meet the Catholic ethical standards required by United States Conference of Catholic Bishops’ Guidelines;
• Competitive-fee structure;
• Potential for greater rate of return with pooling of funds;
• Ensures donor’s intent is preserved and funds support the specific parish, school or ministry in perpetuity;
• Removes administrative burden and costs to manage and report on investments;
• Provides a planned giving and major donor stewardship program to support growth of restricted and unrestricted gifts.

Types of Funds

Most funds can be established for a minimum of $10,000. Once a fund is established, gifts of any size can be added.

Endowment Fund

A fund that helps protect and grow medium- to long-term assets while receiving relatively even annual distributions. Endowments are designed to serve the beneficiaries in perpetuity and are often established with a charitable gift or from an estate designated to support a specific parish, school, ministry or charitable purpose.

Reserve Fund

Similar to an endowment fund, a reserve fund is established with the intent to protect and grow the assets while maintaining even annual distributions, but it allows the beneficiary to access the principal in emergency situations.

Perpetual Care Fund

Funds held, managed and invested for a designated cemetery in accordance with state and federal law, including, but not limited to, the restrictions imposed on the use of the income and principal of perpetual care funds under 18 V.S.A. Chapter 121: §5306.

Donor Advised Fund

For a minimum of $25,000, a donor can make a charitable contribution, receive an immediate tax benefit and then be involved in recommending grants from the fund over time.

Scholarship Fund

For a minimum of $25,000, a donor or organization can create a scholarship fund based on financial need or academic achievement for students attending Catholic schools.

Legacy Gift

Parishioners can make a bequest in their will to a specific fund or establish a fund and leave a legacy of faith for generations to come.
Catholic Schools

**Catholic Schools Fund**
To provide tuition assistance and other financial support for Catholic Schools in the Roman Catholic Diocese of Burlington as determined by the Superintendent of Catholic Schools.

$53,407

**Christ the King Bishop Kenneth Angell Student Assistance Fund**
To provide financial assistance to eligible students at Christ the King School, Burlington.

$267,666

**Christ the King School Fund**
To provide funding for operations of Christ the King School, Burlington.

$659,542

**St. Francis Xavier School Fund**
To provide funding for school operations, education and activities as directed by the school administrator.

$10,565

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**St. Michael Catholic Grammar School of Brattleboro Fund**
To provide funding for operations.

$51,437

**St. Michael School Fund**
To provide funding for financial aid scholarships at St. Michael School, Brattleboro.

$61,988

**Rice Memorial High School Funds**

**Cathedral High School Class of 1957 Fund**
A scholarship fund that would help students afford Rice Memorial High School.

$60,429

**Constance McGowan Fund**
To provide financial aid scholarships to students attending Rice Memorial High School.

$51,182

**Dr. Robert J. Ferro RMHS Science and Mathematics Endowment Fund**
To provide funding to support the Rice Memorial High School Science and Mathematics Department.

$38,283

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“Unwaveringly, Rice supported us in part for each child’s education and we are grateful for the chance to enter its doors year after year, knowing our children are in the hands of God.”
— Rice Memorial HS parent

“The mission of Saint Francis Xavier School is to provide children with an excellent education in a faith-filled and encouraging environment. Our mission is incomplete, however, if this opportunity is available only to a select few. The support of VCCF makes it possible for us to offer financial assistance to more families and welcome more children into our school. The generous donors who provide these funds are lighting the way to faith and learning for future generations.”
— Robin McCormick, Advancement, St. Francis Xavier School
Fitzgerald Fuller Scholarship Fund
To provide financial aid scholarships to students attending Rice Memorial High School.

$55,400

Gregory R. Couture Memorial Scholarship Fund
To provide financial aid scholarships to students attending Rice Memorial High School.

$28,045

Jack and Judy Mable Tuition Assistance Fund
This Fund will provide tuition assistance to eligible students attending Rice Memorial High School who are parishioners of St. Mark Parish in Burlington at the recommendation of the pastor.

$24,927

Lawrence Scholarship Fund
To provide financial aid for students from families who are unable to afford the full cost of tuition at Rice Memorial High School.

$228,071

Lloyd Hulburd Scholarship Fund
To provide funding for financial aid scholarships.

$26,446

Manfred K. Hummel Award
To award a cash price given in Manfred K. Hummel's name to a current junior at Rice Memorial High School who demonstrates excellence in writing.

$26,004

Margo Norman Fund
To provide financial aid for eligible students to Rice Memorial High School.

$41,338

Matthew William Geiger '91 Faith in Action Fund
To be used at the discretion of the Campus Ministry Director and the Principal to help fulfill one of the central tenets of the Rice mission, serving others. The goal is to provide students with as many meaningful outreach opportunities as fiscally possible both locally and outside of Vermont.

$28,257

Michael Quinn '70 Memorial Scholarship Fund
To provide financial aid scholarships to students attending Rice Memorial High School.

$25,177

Msgr. Wendell Searles Scholarship Fund
To grant financial aid scholarships to students attending Rice Memorial High School.

$23,644

Patricia Ready Scholarship Fund
To provide financial aid scholarships to families with an established financial need.

$89,818

Pomerleau Scholarship Fund
Created to memorialize Anne Marie and Ellen, it will provide financial assistance to deserving students entering Rice Memorial High School.

$59,183

“Aid goes to people you know and don’t know — in small and large amounts and is carefully managed to meet the needs of the families who believe in Rice’s faith-based education,”
— Christy Bahrenburg, Director of Advancement and Communications

“My mom is a single parent with four kids. She has sacrificed so much even with her health issues to try to send us to Catholic schools. She prays every day for the help with tuition. She is truly thankful for the help she receives. For me it is the only thing I want. I want to be at Rice. Thank you from the bottom of my heart.”
— Rice Memorial HS student
### Rice Memorial High School Angell Tuition Assistance Fund
To provide funding for financial assistance to eligible Rice Memorial High School students.

$104,515

### Rice Memorial High School in Honor of the Sisters of Mercy Fund
To provide funding for operations of Rice Memorial High School.

$69,959

### Rice-Cathedral Alumni Association Fund
To provide funding for the Rice-Cathedral Alumni Association’s mission to support the interests and general welfare of Rice Memorial High School and its students, faculty, administration, and alumni.

$65,724

### Cemeteries

#### Assumption of the Blessed Virgin Mary Cemeteries Fund
To provide income for the charitable activities of the Catholic cemeteries in Bloomfield and Canaan (Wallace Pond) associated with maintenance, beautification and any restoration of monuments, headstones and grave markers of historical or architectural significance to the community.

$66,547

#### Holy Cross Perpetual Care Fund
To provide for the perpetual care and maintenance of the Holy Cross Cemetery, Colchester.

$30,563

#### Most Holy Trinity Cemetery Reserve Fund
To provide income for the charitable activities of the Most Holy Trinity Parish Cemetery associated with maintenance, beautification and any restoration of monuments, headstones and grave markers of historical or architectural significance to the community.

$12,736

#### Mount Calvary Cemetery Perpetual Care Fund
To provide perpetual care and maintenance of Mount Calvary Cemetery.

$415,291

#### Resurrection Park Cemetery Perpetual Care Fund
To provide perpetual care and maintenance of Resurrection Park Cemetery.

$1,032,312

#### St. George Cemetery Perpetual Care Fund
To provide perpetual care and maintenance of the St. George Cemetery by the St. George Cemetery Association of St. Anthony- St. George Parish.

$88,447

#### St. Isidore Cemetery Perpetual Care Fund
To provide funding for perpetual care and maintenance of the St. Isidore Cemetery.

$13,151

#### St. Peter Cemetery Fund
To provide income for the charitable activities of the St. Peter Cemetery associated with maintenance, beautification and any restoration of monuments, headstones and grave markers of historical or architectural significance to the community.

$10,005
Diocese

Diocese of Burlington Reserve Fund
To provide funding for operations of Roman Catholic Diocese of Burlington.
$500,776

Diocese of Burlington Self-Insurance Fund
To provide funding for operations of Roman Catholic Diocese of Burlington.
$2,346,684

Edwin T. & Helen Buckley Fund for the Roman Catholic Diocese of Burlington
To support works of charity, the care of the poor and vocations.
$816,364

Edwin T. & Helen Buckley Priest Benefit Fund
To support the Priest’s Benefit Fund.
$816,925

Joseph C. and Marie L. Turk Fund
Papal See support and Roman Catholic schools and charities of the City of Burlington.
$707,989

Peter A. Nolin and Bertha A. Mooney Fund
To support the education of young men to the Catholic priesthood from the Roman Catholic Diocese of Burlington.
$1,519,442

Roman Catholic Diocese of Burlington
An endowment fund to provide funds for operations of the Roman Catholic Diocese of Burlington.
$2,060,838

Ministries

Knights of Columbus Endowment Fund
To provide funding for pastoral works of the Roman Catholic Diocese of Burlington as designated by the Bishop.
$9,874

Pizzagalli Fund
To be used for such religious and charitable purposes within the State of Vermont as shall be determined by the Foundation from time to time.
$228,584

St. Anthony for Life Fund
To provide funding for the education, counsel and financial assistance for women in Vermont in order to protect the unborn and support and celebrate the gift of new life.
$63,164

“I established the St. Anthony for Life Fund to provide financial assistance to pregnant women and new mothers not just prior to birth, but also after, because if we are pro-life we need to support families in need after they have their babies.”
—Anthony DiBlasi
Parishes

Christ the King-St. Anthony Parish Fund
To provide funding for operations of Christ the King and St. Anthony parishes.

$539,525

David and Frances Mount Fund
Fifty percent of the annual distribution will support the Cathedral Parish of the Diocese of Burlington at the discretion of the rector and the other 50 percent will support scholarships at Bishop Loughlin Memorial High School, 357 Claremont Avenue, Brooklyn, New York, at the discretion of the Bishop Loughlin Memorial High School administration.

$51,485

Dr. Thomas G. Howrigan Fund (St. Patrick’s)
To support operations of St. Patrick Church.

$105,939

Our Lady of the Mountains Mission Fund
To provide funding for operations of Our Lady of the Mountains Mission.

$152,844

Sacred Heart — St. Francis de Sales Reserve Fund
A reserve fund to provide funding for operations of Sacred Heart – St. Francis de Sales Parish.

$51,178

St Anthony Parish — Sheldon Reserve Fund
A reserve fund to provide funds for operations.

$104,085

St. Anthony-St. George Fund
A reserve fund to provide funds for parish operations.

$107,845

St. Augustine Reserve Parish Fund
A reserve fund to provide funding for operations of St. Augustine Parish.

$409,492

St. Bridget Parish Fund
A reserve fund to provide funds for parish operations.

$356,332

St. John the Baptist Parish, Enosburg Falls, Reserve Fund
A reserve fund to provide funds for operations.

$178,666

St. John Vianney Amy M. Atkins Fund
Masses will be said for the Atkins Family and the poor.

$31,583

St. Joseph Cathedral
A reserve fund to provide funds for parish operations.

$1,018,259

St. Joseph Cathedral Parish Fund for the Poor
To carry on the mission of the Saint Vincent DePaul Society by providing relief to the poor of the parish through the existing Outreach Center known as Joseph House.

$108,036

“Fran and I decided to give something back to the faith that we have practiced all of our lives. We decided to endow our parish of 40 years and also the high school I attended VCCF made giving this gift so easy for us and we are confident that our wishes will be fulfilled for years to come.”

— David Mount, parishioner at St. Joseph Cathedral

— David Mount, parishioner at St. Joseph Cathedral
St. Monica Parish Fund
To provide funding for St. Monica Parish operations.
$41,133

St. Peter Parish Fund
To provide funding for youth ministry, evangelization and other types of Catholic education and outreach.
$10,791

St. Stanislaus Kostka Parish Fund
A reserve fund to provide funds for parish operations.
$203,618

Vermont Catholic Charities

Antonio Pomerleau Emergency Aid Fund
To provide emergency aid to Vermonters in financial crisis through Vermont Catholic Charities.
$10,398

Gokey Fund for Catholic Healthcare
Catholic healthcare to persons in need of such assistance within the Diocese of Burlington.
$1,076,650

Michaud Memorial Manor Fund
To provide funding for operations and other needs of Michaud Memorial Manor.
$53,141

Vermont Catholic Charities Fund
A reserve fund to provide support for operations.
$188,101

“In January, Grace called us with an emergency aid request. She was running out of propane and was afraid that she and her two daughters could not stay in their apartment without heat due to the severity of the weather. We contacted the propane company and paid for a delivery of propane. Grace was relieved and grateful to have heat and be able to remain in their home.”
— Mary Beth Pinard, Executive Director, Vermont Catholic Charities

“Eric came to us for help with a utility bill to avoid a disconnect. While meeting with the emergency aid coordinator, Eric was battling cancer and, because of the cancer treatments, he had to have all his teeth removed. Not only were we able to provide Eric with financial aid, but the Gokey Fund enabled us to help Eric get dentures.”
— Mary Beth Pinard, Executive Director, Vermont Catholic Charities

“Even though I do not live in Vermont anymore and haven’t for many years, I opened the St. Monica Fund to support the operations of my home parish where I grew up and have fond memories and also to challenge others to contribute.”
— Donald Provati

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— Donald Provati
## Statements of Activities

For Years Ended June 30, 2019 and 2018

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td><strong>Revenues</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contributions</td>
<td>$2,740,840</td>
<td>$–</td>
<td>$2,740,840</td>
<td>$6,833,482</td>
<td>$–</td>
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<tr>
<td>Net contributions</td>
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<td>–</td>
<td>18,469</td>
<td>5,250</td>
<td>–</td>
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<tr>
<td>Net realized and unrealized gains on investments</td>
<td>19,009</td>
<td>–</td>
<td>19,009</td>
<td>11,861</td>
<td>–</td>
</tr>
<tr>
<td>In-kind services</td>
<td>–</td>
<td>–</td>
<td>–</td>
<td>96,710</td>
<td>–</td>
</tr>
<tr>
<td>Other income</td>
<td>89,208</td>
<td>–</td>
<td>89,208</td>
<td>69,886</td>
<td>–</td>
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<tr>
<td>Net assets released from restrictions</td>
<td>50,000</td>
<td>(50,000)</td>
<td>–</td>
<td>50,000</td>
<td>(50,00)</td>
</tr>
<tr>
<td><strong>Total revenue</strong></td>
<td>176,686</td>
<td>(50,000)</td>
<td>126,686</td>
<td>233,707</td>
<td>(50,000)</td>
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<table>
<thead>
<tr>
<th><strong>Expenses</strong></th>
<th></th>
<th></th>
<th></th>
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</thead>
<tbody>
<tr>
<td><strong>Program expenses:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grants approved, net</td>
<td>737,418</td>
<td>–</td>
<td>737,418</td>
<td>642,239</td>
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<tr>
<td>Less grants from non-profit organization funds</td>
<td>(733,585)</td>
<td>–</td>
<td>(733,585)</td>
<td>(639,550)</td>
<td>–</td>
</tr>
<tr>
<td>Net grants</td>
<td>3,833</td>
<td>–</td>
<td>3,833</td>
<td>2,689</td>
<td>–</td>
</tr>
<tr>
<td>Grant administration and related program activities</td>
<td>16,529</td>
<td>–</td>
<td>16,529</td>
<td>–</td>
<td>–</td>
</tr>
<tr>
<td><strong>Total program expenses</strong></td>
<td>20,362</td>
<td>–</td>
<td>20,362</td>
<td>2,689</td>
<td>–</td>
</tr>
</tbody>
</table>

| Supporting services:            |                               |            |                                 |                              |            |
| Management and general          | 34,981                        | –          | 34,981                          | 85,314                       | –          | 85,314     |
| Development                     | 42,960                        | –          | 42,960                          | 8,395                        | –          | 8,395      |
| Total supporting services       | 77,941                        | –          | 77,941                          | 93,709                       | –          | 93,709     |
| **Total expenses**              | 98,303                        | –          | 98,303                          | 96,398                       | –          | 96,398     |
| Change in net assets            | 78,383 (50,000)               | 28,383     | 137,309 (50,000)               | 87,309                       |            |            |
| Net assets — beginning of year  | 281,126 (100,000)             | 381,126    | 143,817 (150,000)              | 293,817                      |            |            |
| Net assets — end of year        | $359,509 (50,000)             | $409,509   | $359,509 (50,000)             | $281,126 (100,000)           | $381,126   |            |

Financial Statements
# Financial Statements

## Statements of Financial Position

*For Years Ended June 30, 2019 and 2018*

<table>
<thead>
<tr>
<th></th>
<th>2019</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Assets</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cash and cash equivalents</td>
<td>$126,899</td>
<td>$73,089</td>
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<tr>
<td>Investments</td>
<td>17,689,801</td>
<td>14,567,521</td>
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<tr>
<td>Contributions receivable</td>
<td>50,000</td>
<td>100,000</td>
</tr>
<tr>
<td><strong>Total assets</strong></td>
<td>17,866,700</td>
<td>14,740,610</td>
</tr>
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</table>

<table>
<thead>
<tr>
<th></th>
<th>2019</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Liabilities and Net Assets</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Liabilities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Non-profit organization funds</td>
<td>17,457,191</td>
<td>14,359,484</td>
</tr>
<tr>
<td><strong>Total liabilities</strong></td>
<td>17,457,191</td>
<td>14,359,484</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>2019</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Net Assets</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Without donor restrictions</td>
<td>359,509</td>
<td>281,126</td>
</tr>
<tr>
<td>With donor restrictions</td>
<td>50,000</td>
<td>100,000</td>
</tr>
<tr>
<td><strong>Total net assets</strong></td>
<td>409,509</td>
<td>381,126</td>
</tr>
<tr>
<td><strong>Total liabilities and net assets</strong></td>
<td>$17,866,700</td>
<td>$14,740,610</td>
</tr>
</tbody>
</table>

## Ways to Give

### Assets to Donate
- Cash
- Stocks & Bonds
- Mutual Fund Shares
- Retirement Account Funds
- Retirement Accounts RMDs
- Savings Accounts
- Real Estate
- Life Insurance

### Protect Wealth
- Charitable Gift Annuity
- Charitable Remainder Trust
- Charitable Lead Trust
- Charitable Life Estate
- Investment Account Beneficiary
- Retirement Account Beneficiary

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### Mission

The Vermont Catholic Community Foundation’s mission is to support, serve and otherwise benefit apostolic activities of the Church and make grants to nonprofit organizations reflecting the compassion of Christ in service to the community in the Roman Catholic Diocese of Burlington and the State of Vermont.
With God All Things are Possible.