

SPRING 2022

# Generous Hearts

*In this issue:*

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HONORING  
OUR FOUNDER

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SERVICE ON SUNDAY  
AFTERNOONS

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FOR THE CHILDREN

A publication brought to you by



**CATHOLIC  
FOUNDATION**  
of West Michigan



### From the Executive Director

Dear Friends,

When I first learned the Lord called Bishop Emeritus Robert Rose home on Ash Wednesday, I was struck by a combination of reverence, appreciation, great respect, and a keen sense of loss. I never had the pleasure of meeting the man, though his reputation as a kind and warm soul has been consistently celebrated through countless stories.

Like so often after loss, Bishop Rose's passing invited me out of the rhythms of my busyness to reflect on and appreciate what's important, what matters, and what endures. While doing so, I recalled an old proverb that suggests the best time to plant a tree was 20 years ago. And thanks to Bishop Rose, the roots of the Catholic Foundation of West Michigan are firmly established today. I am so grateful for this legacy, which will continue to grow, compound, and deepen its impact because of his vision, your support, and the work of the Holy Spirit.

His vision to prioritize a long-term foundation reflected not only his love of the Church, but also his deep sense of stewardship – a conviction that everything we have and everything we are is a gift from God. As a good steward, Bishop Rose was grateful for and generous with his many gifts. This conviction helped him to accomplish many great endeavors as expressions of his faith, which you can read about in this issue of *Generous Hearts*.

The Trustees, council members, staff, and I are honored to advance Bishop Rose's vision and steward his legacy with and through the Catholic Foundation of West Michigan. Inspired by our founder's example, we invite you to join us in reflecting on your gifts and how you are asked to use them to further God's kingdom. May the Lord who began this good work in each of us see it through to completion.

Yours in Christ,

**Greg Deja**  
Executive Director

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### Mission

We inspire and enable generous support for parishes and ministries rooted in the teachings of the Catholic Church to make a lasting impact in our communities and the lives of others.

### Funding Priorities

- Sharing Our Catholic Faith
- Educating Children & Young Adults
- Supporting Religious Vocations
- Helping the Poor & Vulnerable
- Caring for Creation

### Contact

- (616) 333-1640
- info@cfwmi.org
- catholicfoundationwmi.org
- 360 Division Ave. S.
- Grand Rapids, MI 49503

**"I invite you to share in our vision of a diocese in which our works of evangelization and service to the needy are not hampered or compromised by a lack of resources."**

***Most Reverend Robert J. Rose***



Watch our award-winning video which offers a two-minute explanation of the Catholic Foundation, its history, and impact in our community.

Scan the image using your phone's camera to access the video.





# In Loving Memory of our Founder

The Catholic Foundation of West Michigan celebrates the life and mourns the death of its founding bishop, Most Reverend Robert J. Rose.

Bishop Rose's legacy is significant and multi-faceted. Of his many accomplishments, one that will surely endure is his leadership in establishing the Catholic Foundation of West Michigan. We look back on his life and the legacy he leaves through the Foundation.

Bishop Rose's vision of joyful stewardship has inspired many to share their blessings in gratitude and with clear purpose to build God's kingdom. His legacy lives on in the students who are able to attend Catholic schools thanks to tuition support, parishes who can rely on their endowment funds, and donors who have shared in the mission of the Lord.

**August 30, 1989**

**Installed as the ninth bishop of the Diocese of Grand Rapids.**

**1995**

**Established the Catholic Foundation of West Michigan** to provide an opportunity for the faithful to share a portion of their blessings for the betterment of the Church and its many ministries.

*"Bishop Rose's vision to focus on a foundation for the long-term support of parishes and schools from the diocesan office was ahead of its time. With his soft-spoken and gentle approach, he made this a priority and took the lead."*  
– Mike Jandernoa, founding board chair

**1998**

**Launched "In the Name of the Lord" capital campaign**, which raised more than \$24 million to establish the Bishop's Fund for Catholic Education, the restoration of the Cathedral of Saint Andrew, and the remodeling of Saint Henry Spirituality and Ministry Center.

**1999**

**Established the Bishop's Fund for Catholic Education** with the ultimate goal of reaching a point where there was enough support for scholarships for every Catholic student and family who needed them.



**1999**

**Began the Bishop's Angels Annual Giving Program**, bringing together generous hearts across the diocese.

*"It was always such a wonderful experience talking with him and listening to his insights. He was just an incredible human being."*  
– Russ and Chris Visner, Charter Bishop's Angels

**Parishes and schools began establishing endowment funds, transferring their independent endowments and foundations to the Catholic Foundation of West Michigan.**

By pooling assets, the Foundation gained access to top managers and exclusive asset classes while driving down costs for fund beneficiaries.

*"While the establishment of the Foundation was initially focused upon making Catholic school education affordable well into the future, Bishop Rose was amazed and pleased in the years that followed as the Foundation diversified to include parish and diocesan ministry funds."*  
– Mark Morrow, former executive director

**2001**

**Established the Jubilee Justice Fund** to strengthen programs and initiatives that provide care and create hope for all our brothers and sisters.

**2003**

**Retired after twenty-two years of episcopal ministry.**

Bishop Rose's episcopal legacy lives on through the Catholic Foundation. Under the leadership of Bishop Kevin M. Britt (deceased), Bishop Walter A. Hurley, and Bishop David J. Walkowiak, the Catholic Foundation continues to grow.

*"It was a joy to serve the Foundation for 19 years because I enjoyed the people so much and because Bishop Rose did such a great job of getting everyone's buy-in."*  
– Roy Lorenz, former board chair

**November 4, 2015**

**Awarded Visionary Honoree** at the Catholic Foundation of West Michigan's 20th anniversary celebration event.

**2020**

**Catholic Foundation expands products and services** with a new brand and strategic plan.

**2021**

**Catholic Foundation surpasses \$100M in assets.**

**March 2, 2022**

**Born into eternal life.** His legacy lives on with and through the Catholic Foundation.





# Service on Sunday Afternoons

## A grandson honors his grandfather's legacy with a new endowment fund

As a young boy, Thomas Gole noticed his grandfather, Frank J. Markel, always seemed to disappear on Sunday afternoons. Eventually, his mother let him in on a little "secret": Grandpa was part of the St. Vincent de Paul Society. Sunday afternoons were set aside for serving others. Grandpa and other members of the Society, known as Vincentians, went on home visits, offering person-to-person service to neighbors in need.

Inspired by his grandfather's faith and commitment to charitable work, Thomas became involved in the Saint Anthony Conference (the Society's term for a local parish chapter).

"Our Conference meets twice a month," Thomas shares. **"We pray together and like the disciples, we go two-by-two, to visit and**

**help vulnerable members of our community.** For example, we recently helped move a single mother and her toddler into an apartment. They had been homeless, but with the help of our Conference and items purchased from the St. Vincent de Paul thrift store, we were able to provide beds, bedding, and housewares to get them back on their feet."

The Conference at Saint Anthony of Padua is the oldest in the Diocese of Grand Rapids. "We were founded in 1919," Thomas says. "My grandpa served as the treasurer for many years. Being an active part of this lay ministry has been a wonderful way to grow in holiness, stay connected to his memory, and keep St. Vincent de Paul going."

To further honor his grandfather and support the work of the St. Vincent de Paul Society, Thomas and his wife Laurie approached the Catholic Foundation of West Michigan. Their goal? Create an endowment fund that would provide seed money to start new conferences throughout the Diocese and help existing Conferences, if needed.

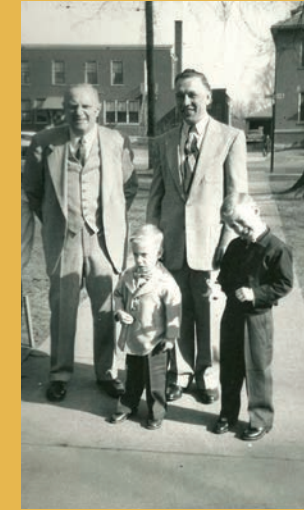
"There are 80 parishes in the Diocese of Grand Rapids, but only three St. Vincent de Paul Conferences at the parish level. We once had 38," Thomas says. **"We pray that the St. Vincent de Paul Endowment Fund, in memory of Frank J. Markel, will help create and support conferences throughout West Michigan."**



Frank and his wife Clara on their wedding day.



Frank leaving for a Sunday afternoon home visit.



Frank with his son and grandsons in front of the original St. Anthony rectory and school.



This wooden crucifix survived a house fire that burned down the Markel's home when Frank was a boy. It is spiritually inspirational to the family to this day.



Interested in starting a conference at your parish? Contact Jim White, president of the Grand Rapids Council, at [j.white@svdpmideastregion.org](mailto:j.white@svdpmideastregion.org).



# FOR *the* CHILDREN

*Through charitable bequests, Paul and Helen Walsh's generosity continues to live on*

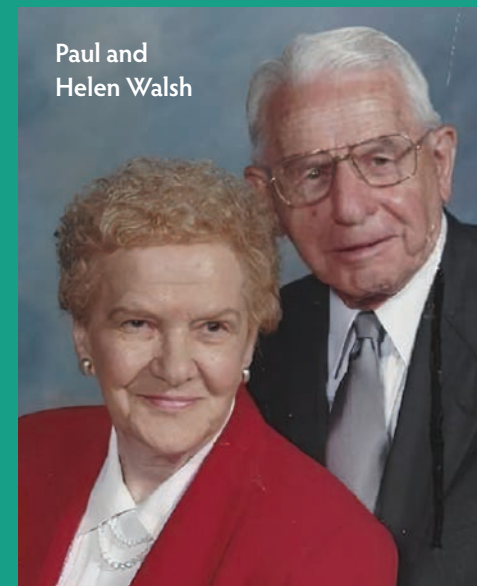


Students at All Saints Academy

When attorney Patricia (Pat) Esch first met Helen Walsh, she was impressed by Helen's bravery.

"She was 90 years old when she first called me to talk about estate planning," Pat remembers. "Her husband Paul, whom she had been married to for 63 years, had recently died. I learned that Paul had always advised Helen to do two things if he passed before her. First—move to St. Ann's Home when caring for the house gets too hard. Second—leave a donation to ensure children can attend Catholic school."

Though the couple had no children, they both felt strongly about supporting education. Paul, a military veteran of World War II, was a proud graduate of Grand Rapids Catholic Central High School and spent his career with the United States Postal Service. Helen came from a large family and worked for more than 30 years at G.M. Diesel Equipment. In her 60s, she achieved her dream of returning to school; she earned a GED from Rockford High School and an associates degree from Grand Rapids Community College.



Paul and Helen Walsh



Students at Catholic Central High School

"I could hear it in her voice," Pat shares. "Education mattered to her and she wanted to ensure every child could attend school, regardless of the cost."

Pat recalls Helen had boundless energy in spite of her age. "Maybe it's because Helen only had 25 birthdays," she jokes, referring to Helen's birthday on February 29th, a leap year. A long time parishioner of St. Jude, Helen served in a variety of ways, including her role as a sacristan and eucharistic minister. She was active with the Northview Senior Center and enjoyed line dancing. After moving out of her home and into St. Ann's, she remained active by tending to her little garden plot, leading the rosary, and attending daily Mass.

Helen worked with Pat to ensure that she and Paul could leave legacy gifts to support students from elementary school through high school. Over time, she and Pat determined the right vehicles that would help Helen reach her philanthropic goals.

"We established two endowed funds with the help of the Catholic Foundation of West Michigan," Pat says. "The Paul and Helen Walsh Scholarship will benefit Catholic Central students. The All Saints Academy fund will provide tuition assistance to students accepted to All Saints Academy." Additionally, Pat is working with the Foundation to establish a third fund in support of All Saints Academy. Designed as a restricted fund, it will pay for the school's STEM-related expenses over the next ten years.

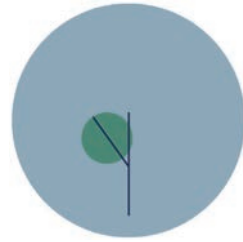
Helen passed away in December of 2020, but she and Paul have left a legacy for years to come. "It was important to me to ensure that Helen and Paul's wishes would be honored in perpetuity," Pat says. "The Foundation was easy to work with and most importantly, ensures the Walsh's faith will continue to make a meaningful and lasting impact in our Catholic community."



# 5 Reasons to Open an Endowed Fund

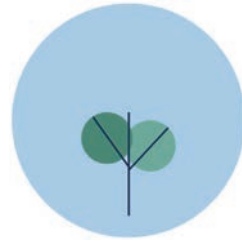
An endowment fund is a permanent legacy of faith, as seen through the examples of Bishop Rose, Frank Markel, and Paul and Helen Walsh. An endowment is the best way to provide a perpetual source of revenue for the parish, school, ministry, or organization important to you.

Contact us to learn about the pathways to open an endowment, helping more Catholic causes say with confidence that their mission is here for good.



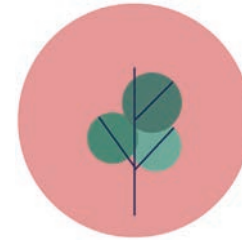
## 1 Leaves a lasting legacy that reflects your faith and values

Leave a permanent legacy of faith to the ministries most important to you. We work closely with you to understand your wishes and clearly state your intentions. We then steward your endowment by honoring your intentions and investing the fund in a socially-responsible manner that aligns with Catholic values.



## 2 Ensures stable and ongoing financial support – forever

Many savvy donors want to help build long-term strength, not just meet today's immediate needs. The beneficiary can rely on – and plan for – the grants the endowment provides. An endowment positions the charity to weather economic downturns, shifting demographics, and changes in funding sources over time, sustaining the mission long into the future.



## 3 Pays tribute to a special person in your life

Is there someone who has made a significant impact on you? Consider honoring their legacy with an endowment which bears fruit forever. Often endowments are named for the family, or in honor or memory of someone special to you.



## 4 Reflects your Catholic faith in your will

Your commitment to the Catholic causes you care about can continue beyond your lifetime. Endowments may be seeded with a gift of cash or appreciated securities now and then mature with a legacy gift as part of your estate. Include a gift in your will or trust, or through a beneficiary designation in a retirement savings account or life insurance policy.



## 5 Inspires others to join in generosity

Match your passions with friends or family to open an endowment together for a common mission. Or lead your family into generosity by opening the endowment and encouraging them to contribute as well. Once an endowment is open, gifts of any size are accepted.

**By opening an endowment or supporting an existing endowment, you are sending a message that you are intentionally supporting the long-term stability, fiscal responsibility, and financial viability of a Catholic ministry.**



**CATHOLIC  
FOUNDATION**  
of West Michigan

**"Your confidence  
in the Foundation  
and its mission  
will continue to  
result in many  
good works long  
after we have gone  
home to God."**

**Most Reverend Robert J. Rose  
1930 – 2022**



Most Rev. David J. Walkowiak presents Bishop Emeritus Robert J. Rose with the Visionary Honoree Award in 2015.

**What will your legacy be?  
Let's start a conversation.**

**CONTACT**

(616) 333-1640 | [info@cfwmi.org](mailto:info@cfwmi.org) | [catholicfoundationwmi.org](http://catholicfoundationwmi.org)  
360 Division Ave. S. Grand Rapids, MI 49503

