

FALL 2024

# Generous Hearts

**Love &  
Charity**

*In this issue:*

LIFELONG FRIENDS LEAVE A  
QUIET YET POWERFUL LEGACY

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DONOR ADVISED FUND PUTS  
YOU IN THE DRIVER'S SEAT

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UPCOMING CATHOLIC  
BUSINESS LEADERS SERIES

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LIGHT OF CHRIST SOCIETY  
CELEBRATES YOUR LEGACY

*A publication brought to you by*



**CATHOLIC  
FOUNDATION**  
of West Michigan



# Give Now, Save More

## Plan Your QCDs Before Year-End

Don't wait until the holidays! Consider the benefits of making a Qualified Charitable Distribution (QCD) to and through the Catholic Foundation before the end of the year. If you are 70½ or older, you can make a tax-free donation directly from your IRA and potentially reduce your taxable income.

By planning your QCD now, you ensure your generous gift will make a meaningful and lasting impact in our communities and in the lives of others. Consult your financial advisor or IRA custodian to arrange your QCD and take advantage of this beneficial giving option.



**"Behold, I make all things new."**  
**Revelation 21:5**

Dear Friends,

As we prepare for an extraordinary Jubilee Year in 2025, the theme "Pilgrims of Hope" beautifully encapsulates the Catholic Foundation's purpose and passion.

In announcing the upcoming holy year, Pope Francis stated we must, "Gain new strength and certainty by looking to the future with an open spirit, a trusting heart, and far-sighted vision ... Christian hope is grounded in the certainty that nothing and no one may ever separate us from God's love."

References to hope, love, and long-term perspective are at the heart of the Foundation's mission. In the Book of Revelation, we find God's promise, "Behold, I make all things new." Here, we are reminded that hope is not merely a passive state but an intentional, transformative force. It calls us to engage in the work of renewal, to bring fresh perspectives, energy, and zeal to the opportunities in front of us.

The Foundation invites you to consider yourself a pilgrim of hope and participate in God's promise. For, as the Holy Father reminds us, "The Lord loves to involve us in his work of salvation."

May God bless you and guide us all in making all things new.

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

### Tax Information

EIN: 38-3298981

### Contact

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



# Small Acts, Big Impact

## Lifelong Friends Leave a Quiet yet Powerful Legacy

**Y**ou may have seen Jean Margaret Johnson and Nanette Marie Goupil enjoying the annual Danish Festival or at the local garden center, loading bags of soil and supplies into their pickup truck. The two women visited the theater from time to time, while Sundays would see the devout Catholics attending Mass at St. Charles Borromeo Parish. In many ways, Jean and Nanette were like anyone else in Greenville, Michigan, the small city to which they'd retired. But if their lives were relatively modest, the women's impact was — and continues to be — anything but.

Former military officers, nurses, and educators, the best friends spent their lives in service to their country and to others, touching the lives of countless service members, patients, and students. They transformed selfless lives into a selfless legacy when they left the entirety of their combined estate to the St. Charles Educational Fund, a permanent endowment with the Catholic Foundation of West Michigan for the St. Charles Borromeo School.

"Their shared goal was helping others," said Mike Lennon, a longtime friend to both women and executor of Jean's estate. "They sought to teach and support the community, and their final gift was giving their resources to someone else who needs it."

### Furthering Catholic Education

Specifically, their house, property, and cash assets were left to the school's endowment, providing tuition assistance to families in need and supporting the general operation of the school. This fund not only provides a Catholic education to children but will also ensure that Catholic education itself can continue in the area — a big deal for a Catholic school in a mostly rural setting.

"Our school community will be forever grateful for Jean and Nanette's deep affection for Catholic school education," said Tonya Saladin, principal of St. Charles. "Their bequest leaves a legacy that will support our families and sustain our work into the future."

Forming relationships in the community was important to both of them. "They hired one young man to work in their garden with them when they needed support as they got older," Mike remembered. Also, "One of the bequests in the will had all of their music collection and stereo system sent to an old friend."

Gardening and music were important to both women, who'd originally met while they were in the military. Both attained the rank of lieutenant colonel — Jean in the Army and Nanette in the Air Force. Both were nurses, working and teaching at a range of military and other hospitals and medical centers. Both also earned PhDs,

*"Their lives reflected the Catholic tradition of faith, academics, and service, which, coincidentally and beautifully, is the fundamental mission of St. Charles School."*

TONYA SALADIN, PRINCIPAL  
ST. CHARLES BORROMEO SCHOOL

perhaps incredibly given the challenges of their military schedules and the decades in which they lived (Jean was born in 1935, Nanette in 1941). Jean earned a doctorate in educational psychology from the University of Washington and Nanette earned a doctorate in educational administration from the University of Wisconsin. There's no question they were driven, focused individuals.

### A History of Service

Jean, a Chicago native, attended Catholic grade and high schools. After attending St. Elizabeth School of Nursing, she joined the Army Nurse Corps in 1959 as a first lieutenant pediatric nurse. From there, she worked as a nurse, recruiter, professor, and author, earning awards and commendations and rising through the Army ranks along the way.

Similarly, Nanette ascended the ranks as an acute care nurse, research designer and analyst, writer, trainer, and manager for the Air Force, in addition to working for several universities and top corporations.

Each lived life focused on her job, and so when their careers were over, both women found themselves relatively alone.

**"Neither married. No kids," Mike explained. "They were both getting ready to retire and thought, 'What are we going to do?'"**

Rather than grow old alone, they decided to move to Greenville together. This was a logical choice because Nanette was born and raised in nearby Grand Rapids, they liked the weather, and they found a strong Catholic community that fit their commitment to faith. After a lifetime focused on service, they found a place where they could relax — even if they didn't exactly.

Mike said both women maintained offices and did their best to keep up in their professional fields. They were also

active in the Greenville community, volunteering at museums and health clinics and participating in community events.

### Quiet Generosity

"They were very busy people," Mike said. "I think part of that was the military. You don't get to be a lieutenant colonel by sitting on your hands. Also, being educators, you get into that 'publish or perish' mentality that college instructors have." They did have fun, of course. Nanette played saxophone in a local band with Mike's wife; it's how he met Nanette. And they enjoyed gardening, both earning certifications as Master Gardeners. They adopted several rescue dogs, took meticulous care of their home and property, and were beloved faces in their community.

Above it all, Mike said, they were strong in their faith. In addition to being regulars at the parish, "I never went into their house and EWTN wasn't on," Mike said, referring to the round-the-clock Eternal Word Television Network. "The daily Mass on EWTN, you could be visiting but Jean would pay attention to Mass. 'Mass is starting; be quiet!' she'd say. It was always that way."

For all of the friends and neighbors who knew them, and for all of the lives they touched, their greatest impact might be yet to come via the students and community that will benefit from their final gift.

As Mike said, "They both felt that their work and their merits stood on what you observed. They both wanted minimal funerals, no headstones, and private burials. At Jean's funeral, there were 25 people — probably 24 more than she wanted. They'd done their thing, and that was it. They weren't about being ostentatious or putting up a monument. In that regard, they were simple people; they didn't expect notoriety, and they didn't want it."

"What they did, they did privately, quietly. They were kind, gentle people who cared about their friends and companions. Their final legacy is that their last dime is going to help others."

**The Catholic Foundation is honored to recognize Jean and Nanette's impact through the Light of Christ Legacy Society. If you are interested in following their path of generosity, learn more about the Legacy Society on pg. 9.**



Jean Margaret Johnson



Nanette Marie Goupil



# Donor Advised Fund Puts You in the Driver's Seat

## Giving Aligned With Your Values

A donor advised fund (DAF) gives you the freedom to decide where and how often you want to give. After opening your DAF, you can recommend grants from your fund to the ministries you wish to support, with the Catholic Foundation managing all the investment, administrative, audit, and distribution work of the account. DAFs are a great option for those who want the flexibility to give to various causes on their timeline.

### HOW DOES IT WORK?



#### 1. Give

You set up a donor advised fund through the Catholic Foundation, which creates an immediate tax benefit for you.



#### 2. Grow

Your money in the fund grows tax-free through socially responsible investments.



#### 3. Grant

From this DAF, you can still give your monthly, quarterly, and annual gifts. Through a simple process, you direct your giving from your fund to the Catholic charity of your choice, and the Foundation manages the paperwork for you.



#### 4. Transform

We will work with you to consolidate your giving so it has a bigger impact.

# INSPIRED BY FAITH

*"I opened my DAF at the Catholic Foundation when I had a taxable event from the sale of my condo in Ohio. Not only was this a tax-efficient decision, it also better organized my charitable giving through one account. I have enjoyed the ease and transparency of the fund, as well as the support and guidance provided by the Foundation."*

– Most Rev. David J. Walkowiak

*"In our best moments, we feel the Spirit moving us to ask, 'How can we help?' We pray for God's guidance on how we can do our part, grab other people by the hand (or, more often, let them grab ours), and work toward making an impact. Our faith inspires us, and our donor advised fund makes our giving simple and convenient."*

– Tim and Bridgett Frost



## Benefits of a Donor Advised Fund

**What makes DAFs the fastest-growing charitable giving vehicle in the United States?**

#### Easy-to-Use

Manage your giving through one convenient account and we'll handle the paperwork. Fundholders have online access where you can see the fund balance, contribution history, investment performance, and recommend grants at your convenience.

#### Simplified

Receive a charitable tax deduction when you make a contribution to a DAF. The Catholic Foundation will provide you with a tax receipt for your contribution, so you no longer need to keep track of receipts from multiple charities.

#### Private and Confidential

A DAF is not required to publicly disclose the grant making activities of individual fundholders. Also, grants may be made anonymously.

#### Multifaceted

You can contribute cash, securities, mutual funds, real estate, and business interests. This tax-savvy vehicle is ideal for those using a "bundling" strategy and/or selling appreciated assets.

#### Comprehensive

Down the road, choose successor advisors, make one-time legacy grants to charities of your choice, create an endowment, or leave the residuary to the Catholic Foundation upon your passing.

#### Growth-Minded

Assets in your fund can grow tax-free. Your gift is invested in a socially responsible portfolio aligned with our Catholic faith, generating more charitable dollars for greater impact.

#### Flexible

Give when you can. Grant when you want. Make your own decisions about which charities to support.

## Gather With Fellow Catholic Business Leaders

Photos from the 2023/2024 series



# FRESH PERSPECTIVES FROM TRUSTED CATHOLIC VOICES

Register now for the 2024/2025 Catholic Business Leaders Series

Each year, the Catholic Foundation of West Michigan invites Catholic professionals to exchange ideas and foster connections in a series of forums. Attendees gain business insights and participate in thoughtful conversations with fellow Catholic business professionals.

A portion of each ticket sale and sponsorship also supports the Love & Charity grants. These are awarded to nonprofits in West Michigan whose missions align with the Catholic Foundation's funding priorities.



Scan QR code to learn more and register.

THANK YOU TO OUR TITLE SPONSORS!



**Jim Hackett**

Former President & CEO  
Steelcase & Ford Motor Company

Wednesday, September 18, 2024



**Marcie Hillary**

Executive Vice President,  
Chief Experience Officer  
Hospice of Michigan

Wednesday, November 13, 2024



**Brad Mathis**

Senior Vice President  
Rockford Construction

Wednesday, February 5, 2025

**Time and location for all events:**

Cathedral Square Center

7:30 - 9:00 a.m. | Doors open at 7:00 a.m.

360 Division Ave. S., Grand Rapids, MI 49503

Tickets are \$40 per event and include breakfast.



# How Will You Leave a Legacy?

As we journey later into life, we begin to reflect on the lasting impact of our actions, beliefs, and contributions — on our loved ones, our community, and the causes that resonate deeply with our values.

This lasting impact is your legacy, what you leave behind for future generations. It's a connection with those who preceded you and those who will follow you. We encourage you to prayerfully reflect on the legacy you are creating, your aspirations for what you wish to leave behind, and the message you hope to share with your loved ones, your community, and your church.

While doing so, we invite you to consider an enduring presence in our faith community by joining the Light of Christ Legacy Society. This society honors those who

have made a planned gift — a gift deferred until the Lord calls them home — in their will or estate plan to any Catholic ministry in the diocese. This can include a parish, a Catholic school, a Catholic organization, the Catholic Foundation or any of its funds, or the Diocese of Grand Rapids.

The Light of Christ Legacy Society provides a platform to pray and celebrate together, honor those who came before us, acknowledge these special benefactors before they enter God's eternal Kingdom, and encourage others to join. Legacy gifts of all sizes combine to help strengthen a thriving faith community for the next generation.

Whether through a bequest in your will, a beneficiary designation in your retirement

plan, or another giving option, your support ensures that future generations will continue to benefit from a vibrant faith community. These gifts enable you to secure the financial needs of your loved ones, provide you with tax benefits, and support the Catholic Church.

As your philanthropic partners, the Catholic Foundation is here to support your charitable giving and create your greatest desired impact. We encourage you to prayerfully consider this opportunity and discuss it with your family and financial advisors.

Together, we can build a future where the light of Christ's love shines brightly for generations to come.

To learn more about establishing a legacy through a planned gift, please contact Teresa Reid, Gift Planning Officer, at [treid@cfwmi.org](mailto:treid@cfwmi.org) or (616) 295-4351.

## WHAT IS PLANNED GIVING?

Planned giving, sometimes called gift planning or legacy giving, is a donor's intention to contribute a gift to an organization upon their passing. Essentially, donors make arrangements for planned gifts in the present, but charitable organizations receive those gifts at a later time.

There are many ways you can leave a charitable legacy, including bequests in your will/trust, donor advised funds, life insurance policies, retirement accounts, real estate, securities, cash, and more.

*Please let us know if you've made a gift to the Catholic Church in your will or other estate plan, so that we can thank you during your lifetime.*

The Catholic Foundation is welcoming founding members to the **Light of Christ Legacy Society**.  
Learn more: [cfwmlegacy.org](http://cfwmlegacy.org)



## WHERE ARE YOU IN YOUR PLANNED GIVING JOURNEY?

- I would like to learn more about supporting a Catholic parish, school, or ministry with a planned gift.
- I have already arranged a planned gift to a Catholic parish, school, or ministry and wish to be included (publicly or anonymously) in the Light of Christ Legacy Society.
- I haven't made plans for a planned gift to a Catholic parish, school, or ministry, but it's on my to-do list.

*Let us help you make the gift that's right for you.*

Full name: \_\_\_\_\_

Email: \_\_\_\_\_

Phone: \_\_\_\_\_

Mail your completed form to 360 Division Ave. S., Grand Rapids, MI 49503 or complete it online at [CFWMlegacy.org/give](http://CFWMlegacy.org/give).



## Are you giving with purpose and intention?

This exercise guides you through a prayerful process to help identify your values, recognize issues that are meaningful to you, and create focus statements that are uniquely yours.

Get started by scanning the QR code for this 30-minute exercise to create your greatest desired impact.



**Allow us to support your intent and impact.**

### CONTACT

(616) 333-1640 | [info@cfwmi.org](mailto:info@cfwmi.org) | [catholicfoundationwmi.org](http://catholicfoundationwmi.org)  
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