



Deacon Wayne and Lisa Rich have created the opportunity for their children to experience the joy of giving. From left: Wayne, Maxwell, Katherine, Marissa, Matthew, and Lisa.

## GIVING BECOMES A FAMILY AFFAIR

For Deacon Wayne Rich and his wife, Lisa, giving back has always been second nature.

As a deacon at the All Saints Catholic Newman Center at Arizona State University and a donor-advised fund holder since 2021, he and Lisa have long supported a wide range of Catholic ministries and local causes.

But one day, Deacon Wayne picked up the phone with a different kind of giving in mind. Continued on page 2

## FRERES TO BE CROZIER GALA CHAIRCUPLE

The Catholic Community Foundation is proud to announce JB and Debbie Frere as Chaircouple of the 35th Annual Crozier Gala, to be held on Friday, May 1, 2026, at the Sheraton Phoenix Downtown.

Debbie, a member of the Foundation's Board of Directors, and fund holder, brings a deep personal connection and professional expertise to this beloved event.

*If you are interested in being part of the planning committee, reach out! 480-651-8810.*

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From left: JB and Debbie Frere, Catholic Community Foundation board member, at last year's Gala.

## \$20K GRANT IMPACTS WOMEN'S DECISIONS

The Sisters of Life vow to protect and enhance the sacredness of every human life, and to continue this calling, they applied for and won a \$20,000 grant from the Catholic Community Foundation's Giving Circle in 2024 in the Life category.

Each year, members of the Foundation's Giving Circle listen to presentations from nonprofit organizations applying for support.

These parishes, Catholic schools, and other qualifying nonprofit organizations share their missions, goals, and plans for using the funds to directly serve our community.

After reflecting on what they hear, the Giving Circle members vote to decide which of the organizations will receive

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## CEO'S MESSAGE

My family in Christ, there are many ways we can show our love for God and neighbor. One of the best, is to establish an estate plan that not only shares the valuables that God has entrusted to us but also expresses our Catholic Christian moral values.

Our legacy on earth is built upon the things we receive from God and those things we do to advance His Kingdom.


In Matthew 6:19-21, Jesus tells his disciples "Do not store up for yourselves treasures on earth, where moth and decay destroy, and thieves break in and steal. For where your treasure is, there also will your heart be."

This reading emphasizes the spirituality of giving that is Christ centered. How do we store our

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*National*  
**MAKE-A-WILL  
MONTH**

**SEE PAGE 5**

 Catholic  
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## DONOR PROFILE

### GIVING BECOMES A FAMILY AFFAIR - CONTINUED

They called Kyle Felix, Chief Financial Officer at the Catholic Community Foundation, and shared something close to their heart: “We want our kids to experience the joy of giving—but we also understand the pressures they’re under. Rent, living expenses, careers just getting started. It’s hard for young adults to be generous when every dollar counts.”

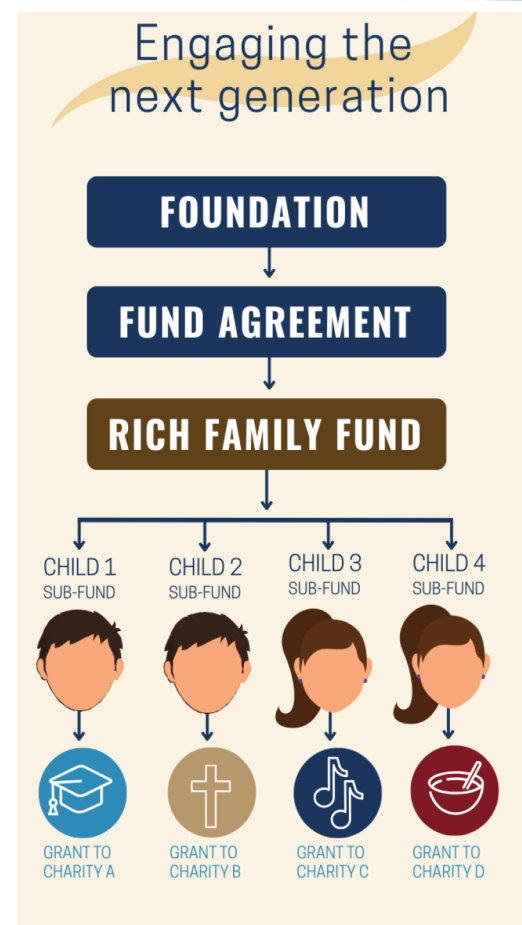
Together, they came up with a unique solution.

The Foundation created sub-funds under Deacon Wayne and Lisa’s primary donor-advised fund—one for each of their four children. To make it easy, each child received their own login and portal access, giving them full visibility and control over their giving.

Deacon Wayne and Lisa fund the account annually, empowering the kids to make their own grant recommendations to the charities they care about. No restrictions. No separate fund agreements. Just an easy, meaningful way to pass on the gift of generosity.

*“The Foundation made it easy,” Deacon Wayne shared. “They gave us the flexibility we needed and helped my kids start their own journey in faith-filled giving.”*

Do you want to bring your family into your giving story? The Catholic Community Foundation can help make it happen. Contact an advisor today, 480-651-8803.



## DONOR IMPACT

### WOMEN’S DECISIONS - CONTINUED



The Sisters of Life gratefully accepting a donated van from the Catholic Community Foundation. The van is used to enable their mission of service.

grants, ensuring that those with the most compelling and immediate needs are supported.

The grant to the Sisters of Life assisted nine pregnant women who were extremely vulnerable to abortion. Because of the intentional

support, these women chose life for themselves and their babies.

Thanks to the grant, Sisters of Life covered the costs of apartment rent, car repairs for transportation, and laptops for school and work.

One of the women impacted by the grant’s assistance, shared how this opportunity helped her achieve her hopes and dreams for herself and her child.

“This grant has helped me in so many ways. It allowed me a fresh start with my bills and brought me closer to God. It was around the time I found out I was unexpectedly pregnant with my fifth child, and I was going through a very dark time in life. It felt like my world was crashing down on me, and I didn’t want to be here anymore.”

“Since then, I have truly sought the Lord and been able to rediscover myself, finding purpose in my existence. This support allowed me time to spend with my kids and give them love and guidance. I was also able to plan for college so that I can get my degree. Although I haven’t started yet, I know I can do it without any major burdens.”

If your parish, Catholic school, or non-profit organization needs support with its most immediate needs, download the Giving Circle Toolkit for qualification information. Deadline to apply is November 30.

Learn more about the Sisters of Life and their programs by visiting their website.

[sistersoflife.org](https://sistersoflife.org)



## MESSAGE - CONTINUED

treasures in Heaven and in what ways can we ensure our legacy demonstrates our love for God and others?

### **Answer: Through an Estate Plan.**

Estate planning is the perfect means we can use to transfer from one person to another those life assets and possessions to continue to further His Kingdom. Executing them carefully and properly formulating legal documents we call a “will and trust”, helps ensure our wishes are followed with a minimum of confusion and in a way that places key decisions in our hands, rather than in the hands of others.

While planning may seem overwhelming, it doesn’t have to be. The Catholic Community Foundation was formed 42 years ago to be a faith-based resource to help through the process of estate planning.

Our mission remains focused on you and God’s Kingdom.

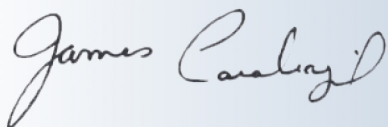
Thankfully, the month of August has been designated as “Make-a-Will-Month”. The Foundation provides a simple yet effective way to share your values as well as your valuables.

Reach out to one of our estate planning specialists to learn more about how you can establish an estate plan that includes a will and trust expressing your love for God.

I encourage you to make some time to formulate an estate plan through the Catholic Community Foundation.

Be clear to all you love where your heart is!

God bless you!



Deacon James Carabajal, CEO  
Catholic Community Foundation



## GIVING 101

# NOT ALL GIFTS ARE THE SAME

## Understanding the difference and restrictions

One of the primary reasons the Foundation was established is to help you understand your giving options. Some elements to consider are time restrictions, eligibility restrictions, and use restrictions. Learn more below, and consider contacting our team to create your personalized plan.

Have you written a check or given money to a charity spontaneously, without a second thought, because you know there is an immediate need?

### UNRESTRICTED CHARITABLE GIFT

A gift to be used for any purpose, in any way.

#### PROS:

- Flexible and quick for urgent needs
- Often in demand and easy to administer
- Requires no additional setup

#### CONS:

- No control over how the donation is used
- The use may not align with specific values or intentions



Did you know there are ways to intentionally give money to the causes closest to your heart that will allow you more control over how your gift will be used?

### RESTRICTED CHARITABLE GIFTS

A gift limited by purpose, time, or eligibility.

#### PROS:

- Aligns with personal interests and passions
- Offers greater transparency on how your donation is used
- Can honor a loved one and continue their legacy
- Can ensure wishes are honored through the Foundation

#### CONS:

- May become obsolete or overly narrow
- Limits organizational flexibility
- Less adaptable to the charity’s future needs



Did you know that you can give a gift that spans generations, has the ability to provide predictable and secure income for your favorite charities, while creating a lasting legacy for you and your family?

### PERMANENT GIFT OR ENDOWMENT

A gift that is invested and generates ongoing income to support your favorite cause(s) forever.

#### PROS:

- Creates a stable, lasting legacy for you and your loved ones
- Grows through prudent and Catholic-compliant investments
- Can be restricted or unrestricted to the charity
- Reinforces family values across generations
- Gives back multiples of the initial gift, over time

#### CONS:

- Not available for short-term needs
- Can feel less tangible at first
- If restricted, less adaptable to future needs of the charity





## LISA REILLY-PAYTON, BOARD MEMBER AND VOLUNTEER

As an attorney, Lisa Reilly Payton is passionate about helping people navigate their estate and tax planning and any legal complexities that may arise along the way. Lisa is originally from Wisconsin, but she relocated to Fountain Hills, Arizona, in 1996, with her parents, Ann and Patrick Reilly. She then attended ASU for her undergraduate studies and law school. She is married to Rod Payton, and they have a 10-year-old son, Ryan, who attends St. Theresa Catholic School.

For the past three years, Lisa has used her talents as a board member at the Catholic Community Foundation and regularly volunteers at their Diocesan - wide “Get Your Affairs In Order” workshops.

As a parishioner at St. Theresa in Phoenix, Lisa believes giving back to the community is essential. Her expertise in estate planning allows her to make meaningful volunteer contributions, such as teaching parishioners about the important process of putting their house in order, by offering valuable insights and practical steps to help ensure their plans reflect their values, reduce burdens on loved ones, and support the causes they care about.

“Sometimes these topics are difficult to talk about,” says Lisa, “But we try to make it easier to walk away with more confidence and resources.”



Lisa Reilly-Payton - Frazer, Ryan, Goldberg, & Arnold, LLP

Learn more about the Catholic Community Foundation Board of Directors by visiting our website. Use your phone to scan the code.



CCFphx.org

## FRERES CHAIR UPCOMING GALA - CONTINUED

“The Crozier Gala tradition is more than just a celebration—it's a chance to come together as a community in support of something bigger,” says Debbie.

With a rich history of generosity and joy, the Crozier Gala offers a unique opportunity to dress up, dine on exceptional cuisine, and enjoy a night of casino games, music, and dancing—all while giving back to causes that shape the future of our faith.

Debbie and her husband, JB, were first introduced to the Foundation when their children received the Christian Service Award. Inspired by the mission and impact of the Foundation, they established an endowment to fund CSA scholarships, paying forward the support their family once received.

With Debbie's extensive background in finance and operations, she says she is honored to apply her skills in support of the Foundation's mission.

“Serving on the Foundation Board allows me to grow both personally and professionally while connecting with people who share a common purpose,” Debbie shares. “It is a spiritually fulfilling way to live out our faith and use our gifts to make a meaningful impact.”



Attendees enjoying an evening out with friends at the 2024 Catholic Community Foundation's Crozier Gala.

Debbie and JB are also active members of the Giving Circle and parishioners at Blessed Sacrament in Scottsdale. As they approach retirement, they look forward to dedicating more time to service and charitable work, continuing to build a legacy rooted in education, faith, and community.

To learn more about attending, underwriting, or other general information about the event, call 480-651-8810.



## TRUST IN GOD AND CONSIDER CREATING A TRUST, TOO

In recognition of *National Make-a-Will Month*, we're unpacking the different ways to leave a lasting legacy. Whether you're beginning to think about your estate or revisiting an existing plan, this guide will help you understand when each option makes sense and how to align your charitable considerations with your values.

You want to be charitable, but what's the best way? Do you need a will? A trust? Will a simple beneficiary designation do the trick? And what if you'd want to start giving today, is there a way for a charity to hold your future gift now?

## CHARITABLE CONSIDERATIONS

### WILL

1. Optimal for estates **less than** < \$75,000
2. Can be used in addition to beneficiary designations for other assets
3. Optimal when giving outright gifts without restrictions to charity of loved ones
4. Risk of being contested by heirs or other parties with a claim
5. It can take longer to make it to the charity if contested/probated

VS.

### TRUST

1. Optimal for estates **greater than** > \$75,000
2. Can be used in addition to beneficiary designations, but generally, all beneficiary designations point to the trust
3. Optimal for when there are restrictions on the gifts/disbursements to charity or loved ones
4. Low likelihood of being contested
5. Higher cost than a will
6. Charities may get gifts quicker

### GIVING OUTSIDE A WILL OR TRUST: Beneficiary Designations

Many people don't realize that a significant portion of their estate may never go through their will or trust. Retirement accounts, life insurance policies, bank or brokerage accounts, and even your home, can be directed by beneficiary designations. These are simple to update and powerful. By naming a charity as a beneficiary, or any beneficiary for that matter, you are providing the charity with an **unrestricted gift**, unless you have previous arrangements made with the charity, or your gift is going into a fund at the Foundation with an already set **restriction**, for example, *an endowed fund*.

### GIVING THROUGH A WILL OR TRUST: Which one?

"Do I need a will or a trust?" is the most common question we are asked when it comes to forming an estate plan. However, when choosing between a will and a trust, your charitable intent is not the only consideration in determining which tool best serves your overall needs.

The types of assets you own, the nature of your beneficiaries, and the level of control you want to exert over those assets are the primary factors that determine whether a will or trust is right for you.

### BEGIN YOUR LEGACY TODAY: Charitable Gift Annuity

A charitable gift annuity provides a two-sided opportunity: receive income for life, and create a fund for a legacy and benefit your favorite charity upon your passing.

This type of vehicle is ideal for those who want to be charitable but are uncertain about the future costs associated with their own personal care. And, for those who are unwilling to make a lifetime commitment to their favorite cause due to the uncertainty of how much will be left at their passing. Charitable Gift Annuities are distinct from Charitable Lead Trusts and Charitable Remainder Trusts, and are often preferred due to their simplicity and low-cost nature.



#### CHARITABLE TIP

Beneficiary designations **supersede** language in your will or trust. Reviewing your designations annually ensures that the asset's destination continues to align with your wishes.



#### CHARITABLE TIP

When a will or trust designates a fund at the Foundation, donors can document their wishes with us to specify charities or impose restrictions. This avoids costly updates to the will/trust if plans change.



#### CHARITABLE TIP

You can make a one-time charitable gift annuity using your Required Minimum Distribution (RMD), with a limit of up to \$54,000 per individual, or \$108,000 per married couple, for calendar year 2025.





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4500 South Lakeshore Drive, Ste 650  
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## UPCOMING EVENTS



**Tell your favorite  
organization!**

### 2026 Giving Circle Grant Application Tool Kit

Toolkit Available Now!  
Application Opens - September 1  
Closing Deadline - November 30

In 2025, the Giving Circle granted \$177,197 to seven local non-profit organizations making a difference in our community.

Help spread the word about this grant opportunity! Share with organizations close to your heart. Learn more about eligibility and how to apply using this QR code.



### Donor Appreciation Mass and Brunch

Saturday, November 1  
Mt. Claret Retreat Center

- 9 a.m. - Mass
- 10:30 a.m. - Brunch
- 11 a.m. - Guest Speaker

Watch for your invitation in the mail!

Save the Date! All Catholic Community Foundation donors are invited to attend Mass and stay for a complimentary brunch.



### 2026 Catholic Scholarship Application Tool Kit

Available Now!  
Closing Deadline - January 31

In 2025, we granted 40 Catholic school scholarships totalling \$479K.

- Catholic Community Foundation Scholarship Award
- Christian Service Award Scholarship
- Angel Scholarship - Social Work
- Ralph M. Knight Scholarship - Chemistry and Engineering

Use the QR code to learn more about these need and service-based scholarship opportunities.

