

# CSF Honor Roll of Donors

July 1, 2011 – June 30, 2012

Cotter Schools  
Bristol-Myers Squibb  
Foundation Matching  
Gift Program

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Warren Wunderlich  
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Dennis & Ellen Zempel  
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Zimmerman  
James & Mary Ann  
Zimmerman



*The Father Paul Nelson Legacy Society gratefully recognizes anyone who has notified CSF that they have made provisions for the Catholic Schools Foundation of Winona through a variety of estate planning tools.*

*\*Denotes Charter Members, "Ad Infinitum" denotes realized gifts*

Dave & Muriel Arnold\*  
Mike Arnold\*  
Ted & Patti Biesanz\*  
Jeff & Sara Brandon\*  
Jeff & Barb Breza\*  
Charles Degnan Ad Infinitum \*  
Phil Feiten\*  
Therese Feiten Ad Infinitum\*  
Fran & Shelley Filzen\*  
Fr. Lawrence Ginther Ad Infinitum  
Lucas Hansen\*  
Mike Hansen\*  
Willie Hahn  
Clark Johnson\*  
Steve & Jean Jorde\*  
Mary & John Keane  
Rev. Don Lovas  
Elaine Luksa Ad Infinitum  
Fr. Joe Keefe\* Ad Infinitum  
Mike & Jean Kertzman\*  
Fr. Paul Nelson\*  
Stephen Profilet  
Roger & Kathy Reitmaier\*  
Joan & Paul Roemer\*  
Dan & Pat Rukavina\*  
Jim & Jane Schneider\*  
Julius (D) & Marge Schneider\*  
Robert Schultz Ad Infinitum  
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Laura & Paul Schaffner  
Bernette Scherbring  
Steve & Barb Slaggie\*

Al Smith  
Charles & Marie Smith\*  
Phyllis & E. Wayne Smith  
Ad Infinitum  
Fr. James Speck Ad Infinitum  
Josephine Steinbauer  
Ad Infinitum  
Marian Thiewes\*  
Peter & Kay Walsh\*  
Jim Yenish\*

Gifts reflected in this report were received from July 1, 2011- June 30, 2012. We value the importance of the accuracy of this report and have made every effort to ensure its correctness. If there are any omissions, misplaced information, or misspellings, please accept our sincerest apologies and contact our Development Office at 507-453-5102. We will make those corrections or updates appropriately.

The Catholic Schools Foundation of Winona, MN is an annually audited 501(c)3 organization. Complete audited financial information and organization policies are available upon request from the CSF Development Office at 1115 West Broadway, Winona, MN during normal business hours.

## President's Report

Dear Friends of the Catholic Schools Foundation (CSF):

I am sure I speak for all as we extend our thanks and appreciation to our outgoing President, Ted Biesanz. Ted's efforts, insights and leadership served the foundation and ultimately our schools and kids in an exemplary fashion. Fortunately, Bishop Quinn also recognized Ted's abilities and appointed him to be his representative on the foundation board. We look forward to Ted's continuing contributions of time and talent to CSF. Ted replaces Dave Arnold who is stepping down after 20 years of faithful service. Fortunately we will be able to still call upon Dave in the future for his wisdom and counsel. Thanks Dave!

We were once again blessed by many gifts from our supporters and we are forever grateful. Of special note, CSF was remembered in the estate plans of two former diocesan priests, Fr. Lawrence Ginther and Fr. Joe Keefe who passed away this past year. It should be noted that Fr. Joe was a charter member of the Father Paul Nelson Legacy Society. Members of the Society make provisions for CSF in their estate planning. Please consider this opportunity for deferred giving to CSF as you make future financial decisions. You can contact Tim McBeth, Chairman of the Society committee, or Megan in the Cotter Development Office for more information.

A change was made to our funding formula with two goals in mind: Increase annual contributions to our schools while maintaining the corpus of the fund so it will remain strong for generations of Catholic school students. As a result we were able to increase annual funding retroactive to the 2011 fiscal year as well as 2012.

While CSF is a legal entity with a mission to financially assist our Catholic schools and students, it really consists of all of you who make this possible through your gifts and contributions. We value your partnership with us and promise to be good stewards as we support our schools and kids far into the future. We appreciate your consideration of a gift to our annual Thanksgiving Appeal.

Sincerely,



Tim Dalton



Your investment and commitment to our Catholic schools in Winona has been admirable and we would like to take this time to thank you. Your support is part of the future of Catholic Education.

We would also like to extend an invitation to join the CSF Father Paul Nelson Legacy Society. This society is CSF's deferred giving program, and will invest in the future of our Catholic schools while memorializing your support of our schools through a legacy gift. Making a deferred gift through your estate planning most significantly demonstrates your commitment to the Catholic Schools in Winona and will set an example and encourage others to follow your lead.

For more information on the Father Paul Nelson Legacy Society and deferred giving to our Catholic schools in Winona please contact:

**Tim McBeth -Fr. Paul Nelson Legacy Society Chair**  
at 507- 453- 6335, [tmcbeth@winonaagency.com](mailto:tmcbeth@winonaagency.com)

or

**Megan Strange '94 - CSF Development**  
at 507-453-5102, [mstrange@cotterschools.org](mailto:mstrange@cotterschools.org)

## Foundation Development

CSF has enjoyed generous contributions from the Winona community for over 20 years to benefit students. If you would like to learn more about how you can further your support of Foundation efforts, please contact any of the members of the Board of Trustees or Executive Committee or:

Megan Strange '94, Development Director  
Catholic Schools Foundation of Winona  
1115 W. Broadway  
Winona, MN 55987  
(507) 453-5102  
[mstrange@cotterschools.org](mailto:mstrange@cotterschools.org)

## Board of Trustees

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<b>St. Casimir's</b>	Msgr. Rick Colletti Carol Ehlinger
<b>St. John's</b>	Msgr. Tom Hargesheimer Amanda Weifenbach
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## Executive Committee

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## Investment Committee

Sue Savat- Chair Dave Arnold Sara Brandon John Broadwater  
Don Evanson Mike Hansen Tim McBeth Sam Shea

## CSF Financial Summary

	For the Year Ended 06/30/11	For the 24 Yrs Ended 06/30/11
<b>Beginning Balance</b>	\$5,280,285	\$0
<b>Revenue</b>		
Gifts Received	\$168,535	\$4,529,320
Gifts Special Event	\$5,856	\$24,965
Investment Income	\$95,382	\$4,221,144
<b>Expenses</b>		
Operating	\$(63,375)	\$(475,572)
<u>Distribution to Schools</u>	<u>\$(215,110)</u>	<u>\$(3,029,284)</u>
<b>Ending Asset Balance</b>	<b>\$5,271,573</b>	<b>\$5,271,573</b>

A complete audit report is available upon request.

# Thoughtful Investing

Annual Report for the Year  
Ending June 30, 2012

## The Education



## The Foundation



## The Future



**Catholic Schools  
Foundation** of Winona,  
Minnesota, Inc.  
Supporting Cotter Schools &  
Winona Area Catholic Schools