



The Catholic Foundation of Southwest Iowa

Promoting a legacy of giving and support within the Diocese of Des Moines

Have you considered an agency fund?

An agency fund held at the Catholic Foundation of Southwest Iowa enables Catholic parishes, schools, and organizations to capitalize on long-term investment strategies in a diversified portfolio managed by professionals.

If you have an agency fund, did you know?

Our website holds the capability for viewers to donate to your agency fund(s) online by following these steps:

- 1 | go to www.catholicfoundationiowa.org
- 2 | select your agency fund(s)
- 3 | make a one-time donation or select reoccurring monthly distribution

The “Catholic Values Investing” Difference

The United States Conference of Catholic Bishops (USCCB) has declared “Socially Responsible Investment Guidelines” for Catholic institutions and individuals. These investment guidelines were formed in compliance with the 1986 pastoral letter, titled Economic Justice for All, in which the Bishops address corporate and economic responsibility. The USCCB investment principles focus on the following areas: protecting human life, promoting human dignity, reducing arms production, pursuing economic justice, protecting the environment, and encouraging corporate responsibility.

Consistent with the Gospel, universal church teaching, the USCCB, and guidance from our local bishop, the CFSWIA offers a variety of moral and socially responsible investment options designed to meet a variety of goals and needs, while adhering to Catholic values. The CFSWIA performs quarterly screening of funds to ensure we are meeting our investment criteria.

The “Leaving a Legacy” Plan Menu of Services



The “Leaving a Legacy” Plan begins with you! A personalized approach is the key to your ongoing success. We will customize a plan with you.

Pulpit announcements

We will visit the requested parish to share the planned giving message and to offer services to parishioners.

Parish bulletin graphics

The CFSWIA can provide graphics for your parish to use in bulletins, newsletters, or on your website in order to promote planned giving within your parish.

Donor consultation appointments

At the CFSWIA, we strive to be of service to all and an extension of your staff. We are available to meet with individuals or families, or to join you and your staff when meeting with individuals or families about gift planning.

Seminars

The CFSWIA provides three seminars to any entity upon request. A marketing kit is provided for all seminars, all seminars are co-presented with an attorney or financial planner, and attendance of 20+ is requested. A Q&A session personalizes each experience. These seminars can be presented for any parish, school, organization, or Board of Directors on the following topics:

- **Wills and Estate Planning** *target audience: everyone*
 - Will & beneficiary designation
 - Will & trust overview
 - Donor Advised Funds
- **Planning Today for Their Tomorrow** *target audience: young families*
 - Donor Advised Funds
 - 529 Educational Savings Accounts
- **Ways to Give** *target audience: ages 50+*
 - Will & beneficiary designation
 - Charitable gift annuities
 - Donor Advised Funds

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