

# CATHOLIC FOUNDATION DIOCESE OF TOLEDO AUGUST NEWSLETTER

## FUN FACTS

Approximately 80% of elevator "close door" buttons aren't connected to anything

We forget the majority of our dreams so we do not confuse them for real memories

Harry Potter author J.K. Rowling is the first billionaire to fall off the Forbes billionaire list because of charitable giving. "You have a moral responsibility when you've been given far more than you need, to do wise things with it and give intelligently"



Catholic Foundation  
Diocese of Toledo  
August 2016

## REGIONAL MEETING SUMMARY

Thank you to all who have attended one of the three regional meetings sponsored by the Catholic Foundation. The final meeting will be hosted at St. John's in Delphos on November 9th at 5:30 PM.

The meetings have opened with Jeff Weisker from Fund Evaluation Group reviewing quarterly results and answering questions related to investments and the market in general. We welcome all parishes and schools, their staff and committee members to attend the meeting regardless of whether or not they are currently invested with the Catholic Foundation.

Please continue reading the summary of the [Regional Meetings...](#)

## ANNUITIES WRONG FOR SO MANY REASONS...

June 16, 2016

By [Marc Lichtenfeld, Wealthy Retirement](#)

Last week, Steve McDonald wrote about a *good* problem to have: We're living longer. The problem is that we have to pay for our extra years. Or, as Steve said, we have to "hedge against our own longevity."

One solution he suggested is to buy an annuity.

Steve is my go-to guy when it comes to bonds. There's no one better.

But on the issue of annuities, I couldn't disagree more. [Read more.](#)

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## 6 REASONS TO REVIEW YOUR RETIREMENT SAVINGS PLAN

If you're saving each month for retirement, that's great! You're working toward building a secure financial future for yourself and your loved ones. But you can't just sock away money for the future and forget about it. You need to revisit your financial plan regularly.

Why? [Continue reading...](#)

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## DON'T MAKE THESE MISTAKES AT YOUR NEXT FUNDRAISING EVENT

It's fundraising event season! And everybody is hard at work with caterers, venues, auctions and you name it.

But what about your guests? Sometimes in all the hubbub – we forget to worry about our lovely guests who are nice enough to attend!

Read the [full article](#).

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## TOLEDO AREA PARTNERSHIP FOR PHILANTHROPIC PLANNING TO HOST ESTATE PLANNING AND CHARITABLE GIVING EVENT

CE Day Presented by TAPPP, Lourdes University, and MassMutual Ohio Brokerage

Tuesday, September 13, 2016

Franciscan Center at Lourdes University

5.5 Hours of Continuing Education Credit, Continental Breakfast and Lunch - \$20.00

The Toledo Area Partnership for Philanthropic Planning (TAPPP) is a great source for education, advocacy and networking in Northwest Ohio and Southeast Michigan.

For detailed information on the day check out this [flyer](#).

[Register here](#)

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## STUDENT LOAN DEBT: WHAT EVERY BORROWER SHOULD KNOW

[Brian Schiess, CFP®](#) July 19, 2016

...you will find that many graduates are in distress about one thing that could get in the way of all that: student loan debt. Here are some points you can share with graduates to help put them at ease.

It is important for graduates to know and understand the types of student loans they have. [Continue reading...](#)

Please consult your tax or investment advisor before implementing any tax advice.

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