



**The Catholic Foundation
of Central Florida**
Inspire Giving. Fund God's Work.



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Newsletter



**AUGUST
2026**

Planning with Purpose: A Guide For National Make-A-Will Month

National Make-A-Will Month reminds us that estate planning is more than preparing legal documents, it's an act of stewardship. Taking the time to create a plan today can provide peace of mind for your loved ones, protect what matters most, and ensure your wishes reflect your faith and values.

In honor of National Make-A-Will Month, we've dedicated this special edition of our newsletter to guiding you through the estate planning journey. Inside, you'll learn why having a valid will matters, explore planned giving through bequests, hear stories of faithful stewardship from fellow Catholics, and find practical tools like our complimentary [Estate Planning Checklist](#) and [FreeWill](#) resources to help you get started.

Whether you're taking the first step or updating an existing plan, we hope these resources provide the knowledge and confidence to help you plan for the future with faith and peace of mind. As always, The Catholic Foundation is here to help. In partnership with members of our [Planned Giving Advisory Council](#), we're

committed to providing trusted guidance every step of the way, and we invite you to join us on August 25th at Bishop Moore Catholic High School for our [complimentary Wine & Wills event](#) to take that next step on your estate planning journey.



Madelyn T. Weed, CFRE, CAP®

President & CEO

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[**Join us for Our Complimentary Wine & Wills Event on August 25th**](#)



Join us for a complimentary evening of wine and practical estate planning guidance rooted in your Catholic values. Learn from Catholic estate planning professionals and receive valuable resources to help create a lasting legacy. [**RSVP here!**](#)

[**Learn More About Wine & Wills from Past Participants**](#)



Hear from a past attendee and one of our Catholic estate planning attorneys as they share how Wine & Wills provides valuable guidance, answers important questions, and helps families begin planning with confidence. [**Click here**](#) to watch.

[**How to Get the Most Out of Wine & Wills**](#)



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How to Get the Most Out of

Wine & Wills

Tuesday, August 25th

5pm - 7pm

*Bishop Moore Catholic High School
3901 Edgewater Dr, Orlando*



We look forward in welcoming you to the Wine and Wills event on Tuesday, August 25th at Bishop Moore High School. [Click here](#) for helpful tips on how to make the most out of this complimentary event.

[Do You Have a Valid Will?](#)



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You may already have a will, BUT do you have a valid will?

To be valid, your will must:



Be in writing



Be signed and dated by YOU



Be signed by two adult witnesses



Witnesses should not be beneficiaries

For educational purposes only; not legal advice. Please consult your attorney regarding your individual estate planning needs.

Having a will is important, but making sure it's legally valid is just as essential. Join us at Wine & Wills **have your documents witnessed and notarized at no cost**. If you need to stat planning, you can create your complimentary will documents in about 20 minutes with our trusted partner, [FreeWill](#).



Did You Know?

Everyone has an estate plan: it's either your plan or the government's plan. Taking time to create your own plan helps ensure your wishes are honored and your loved ones are cared for according to your values.

The Catholic Foundation offers complimentary estate planning resources, including our FreeWill tool and Wine & Wills educational events, to help you get started.

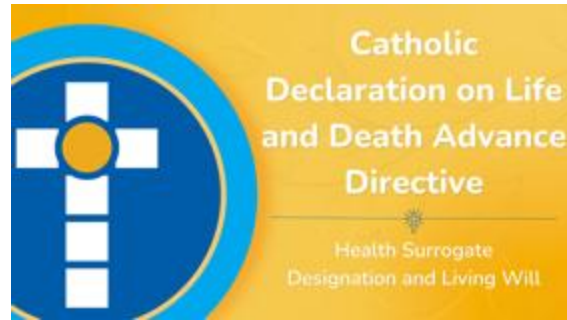


[FreeWill's Estate Planning Checklist](#)

[Catholic Declaration of Life and Death
Advance Directive](#)



Getting started with estate planning doesn't have to be overwhelming. Our partner, FreeWill, created a complimentary Estate Planning Checklist to help you get organized. [View the checklist here.](#)



While creating or updating a will is an essential part of estate planning, it's only one piece of a comprehensive plan. One often-overlooked document is [the Catholic Declaration on Life and Death](#) [Read more...](#)



[***Faces of Philanthropy: Meet Paul and Gaetana Bosley***](#)

[***Philanthropy Moment: What is The Vivos Christi Society?***](#)



For Paul and Gaetana Bosley, planned giving is an extension of a lifetime of faithful stewardship. Through their commitment to tithing, service, and including their parish in their estate plan, they are helping ensure the Church continues to flourish for generations to come. [Click here](#) to read their full Faces of Philanthropy Q&A.



If you have included a Diocese of Orlando parish, school, or ministry in your estate plans, you qualify for membership in the Vivos Christi Society! Learn how notifying The Catholic Foundation allows us to recognize your generosity and help ensure your future gift fulfills your charitable intentions. [Click here](#) to watch.



CFOCF Trivia:

Which of the following resources does The Catholic Foundation offer to help you begin your estate planning journey?

- A)** FreeWill
- B)** Wine & Wills
- C)** Planned Giving Advisory Council
- D)** Legacy Planning Seminars
- E)** All of the above



E) All of the above

**Now Accepting Applications for
Fall/Winter Event Sponsorship**



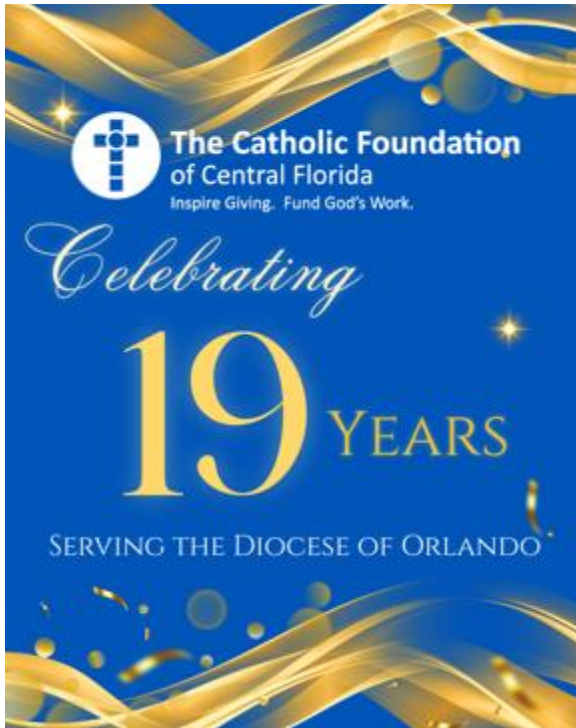
We invite all diocesan parish, schools, and ministries hosting events in the Fall/Winter season to apply for our Event Sponsorship Grant. This grant supports diocesan organizations as they spread the good news of their ministry, strengthen donor relationships and raise funds to continue their impactful work. [Click here](#) to apply!

**Put Faith into Action - Apply to Work at
The Catholic Foundation**



At The Catholic Foundation, our work is rooted in faith and stewardship. We're looking for talented individuals who are passionate about making a meaningful difference. You'll be joining a collaborative team dedicated to helping others create lasting impact. [Click here](#) to learn more about our job opportunities.

Celebrating 19 Years of Serving the Diocese of Orlando



On August 31, The Catholic Foundation of Central Florida celebrates 19 years of serving the Diocese of Orlando community. Over the past year, we've established 20 new charitable funds totaling \$13.3 million, distributed more than \$5.5 million to parishes, schools, and ministries, and assisted with the fulfillment of 59 legacy gifts.

We are deeply grateful to the donors, clergy, parishioners, and ministry partners whose generosity helps strengthen our Church and advance its mission. As we celebrate another year of service to the church, we invite you to explore our [Impact Reports](#) and reflect

on how The Catholic Foundations has grown over the past 19 years. We look forward to another year of partnership with you and continuing the faithful stewardship of the gifts entrusted to our care.

Market Highlights from Our Trusted Partner The Concord Advisory Group, Ltd.

"Stock Investing: Lots of Losers with Big Winners"

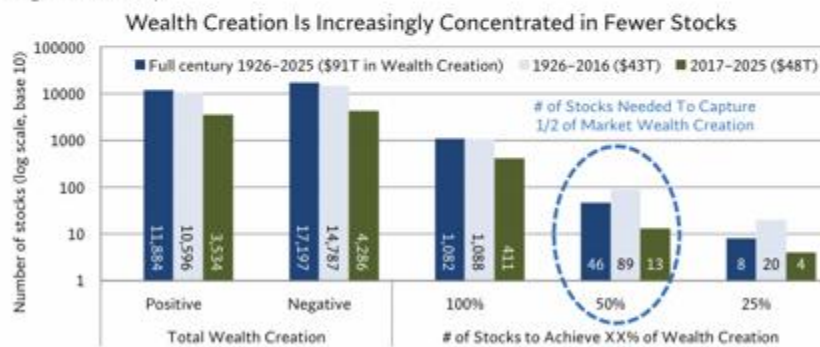
Stock Investing: Lots of Losers with Big Winners

Many market commentaries have covered the concentration of equity market returns in a very small number of stocks. A recent paper by Arizona State University Professor Hendrik Bessembinder looks at 100 years of U.S. stock returns and his data shows that the narrowness of equity market wealth creation may be even more concentrated than is widely realized and the concentration of returns has meaningfully increased in recent years.

Notable observations from Bessembinder's analysis:

- U.S. Equity investing has been very lucrative, generating \$91 trillion in wealth over the last 100 years.
- However, more stocks have negative total returns than positive returns and only 41 percent of stocks have outperformed T-Bills.
- Gains have become more concentrated. It only took 13 stocks to generate half of the \$48 trillion in market gains over the last 9 years, compared to 89 stocks over the prior 91 years (1926–2016)

The implication for investors is a reminder to cast a wide, diversified net across the equity market. The paper also underscores that return compounding has been the key to equity wealth generation. Broad index exposure is one way to capture market breadth and compounding simultaneously.



Bessembinder, Hendrik, "One Hundred Years in the U.S. Stock Markets," W.P. Carey School of Business, Arizona State University, March 21, 2026. Available at SSRN

CONCORD ADVISORY GROUP, LTD.

Many market commentaries have covered the concentration of equity market returns in a very small number of stocks. A recent paper in Arizona [Read more...](#)

Share Your Thoughts On This Month's Newsletter



[Learn more about
joining the St.
Katharine Drexel
Society](#)



St. Katharine Drexel is the patron Saint of Philanthropy. The Catholic Foundation of Central Florida strives to emulate her work by enhancing philanthropic impact which serves those who are most in need in nine counties of Central Florida. [here](#).

Our Mission:

To inspire and increase giving, to prudently invest the resources entrusted to us, and to capably steward those charitable gifts to support the spiritual and corporal needs of the community of the Diocese of Orlando.

Returning God's Gifts



**The Catholic Foundation
of Central Florida**

Inspire Giving. Fund God's Work.

Stay Connected With Us Everyday!



The Catholic Foundation is an independent 501(c)(3) nonprofit foundation committed to fostering and stewarding philanthropy to address community issues and meet the spiritual and corporal needs of our community year-round. As a proven trustworthy philanthropic organization to give to and give through, we have received the Guidestar Platinum Seal of Transparency. Fully endorsed by the Diocese of Orlando and its Bishop, we work extensively with Catholic parishes, schools and nonprofit organizations aligned with Catholic social values to help inspire giving and secure resources needed to further their long-term goals.



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