



legacy *conference*

Bringing generations together in meaningful conversations about the Catholic faith, family, and the future.



**THE CATHOLIC
FOUNDATION**

Malvern
Retreat House



MAY
21 2026

**MALVERN
RETREAT
HOUSE**



Welcome!

Thank you for joining us for the inaugural Legacy Conference. This event was created to educate and inspire the faithful of Greater Philadelphia on the importance of prayerful estate planning and planned giving through the lens of Catholic values. Whether you are just beginning to reflect on your legacy or already have plans in place, we hope today offers both inspiration and practical guidance rooted in faith.

Our hope is that you leave today better prepared to engage in meaningful conversations with your loved ones about the legacy you wish to leave behind. Through the wisdom and expertise of our presenters, we aim to help you make thoughtful, values-driven decisions that reflect your Catholic faith while preparing future generations to carry that legacy forward.

We extend our sincere gratitude to the sponsors whose generosity made this event possible and allowed us to offer it free of charge. On behalf of the teams at The Catholic Foundation and Malvern Retreat House, thank you for being with us today. We commend you for taking part in conversations that are not always easy to begin, but are profoundly meaningful for your family, your faith, and the generations to come.

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CONFERENCE SCHEDULE

8:00 AM	Mass
8:45 AM	Breakfast and Fellowship
9:30 AM	Created for Stewardship: Biblical Reflections on Estate Planning
10:00 AM	Where Faith Meets the Future: Family Conversations in Legacy Planning
10:40 AM	Break
10:50 AM	Passing on the Gift: Philanthropy from a Catholic Perspective
11:30 AM	Lunch
12:30 PM	Answering the Call: Putting Your Catholic Legacy Into Place
1:00 PM	Church Teaching at the End of Life: The Meaning of Your Final Chapter as a Catholic OR Stations of the Cross

ABOUT THE CATHOLIC FOUNDATION



The Catholic Foundation is an independent community foundation founded in 2013 by a group of dedicated Catholics committed to transparency, impact, and the future of our Church.

The Foundation's team is comprised of philanthropic experts grounded in the principles of faith and service to serve the diverse needs of Catholic donors and institutions through fund

management and planned giving. Like those we serve, we are invested in the future of our faith.

You decide where to give. We help make it go further.

You care deeply about your faith and the future of the Church — and you believe your giving should reflect that. When you support the organization, parish or ministry close to your heart, you want to be sure your gift will be used exactly as you intended. We make that a reality.

At The Catholic Foundation, your giving is our mission.

Your Gift. Your Intent. Our Promise.

As the region's only independent community foundation, we are your trusted source for all Catholic charitable and philanthropic resources — offering the tools, guidance, and transparency you need to be certain your generosity supports the causes that matter most to you. Our first priority is, and always has been, honoring our donor's intent so your giving can create the lasting impact you envision: for your faith, your community, and your legacy.

What We Do

- Manage and grow charitable assets with integrity and Catholic values through donor-advised funds, endowments, and planned gifts.
- Grant and support Catholic parishes, schools, and ministries making a difference across our region.
- Convene and connect Catholic leaders, funders, and advisors to tackle big challenges and amplify collective impact.

(215) 587-5650

thecfgp.org

contactus@thecfgp.org



ABOUT MALVERN RETREAT HOUSE



At Malvern Retreat House, we meet each of our visitors where they are, offering them a quiet and healing respite from the demands and distractions of everyday life. All who set foot on our grounds are immediately touched by the peace and beauty they find.

As the United States' oldest and largest Catholic retreat site, Malvern Retreat House is rooted in a rich

tradition of Marian and Eucharistic prayer. For more than a century, our 250 annual events have provided powerful opportunities for formation, renewal, and healing to:

- Youth
- Married Couples
- People in Recovery
- Families
- Single Men & Women
- Men & Women of Malvern
- Thematic Retreats for Men & Women

Participate in a Legacy of Formation, Healing & Renewal

Throughout our rich 109-year history, Malvern Retreat House has hosted thousands of retreat experiences for more than one million retreatants. Founded in 1912 to serve laymen in the Philadelphia area, Malvern Retreat House continues to build upon its legacy of healing today by serving men and women of all ages and walks of life.

Reflect on the Beauty of His Creation

Located in the quiet countryside of Chester County, Pennsylvania, Malvern Retreat House occupies a 125-acre expanse of land that retreatants are free to explore. In the rolling hills of our woodland escape, visitors will find countless sacred spaces, private chapels, shrines, grottos, and places for reflection.

Discover What Malvern Means to You

While retreats and reflections are at the heart of what we do, Malvern Retreat House has much more to offer. From holding meetings in our conference centers to planning your organization's own weekend at our facilities, guests can make their experience exactly what they need it to be.

(610) 644-0400

malvernretreat.com

Malvern
Retreat House



MEET THE SPEAKERS

CREATED FOR STEWARDSHIP: BIBLICAL REFLECTIONS ON ESTATE PLANNING

Presented by: Fr. Thomas Dailey, O.S.F.S.

Reflect on the stories of Creation and the Annunciation and explore what Christian stewardship means in practice and how thoughtful estate planning can play a meaningful role.



Fr. Thomas Dailey, O.S.F.S. currently holds the John Cardinal Foley Chair of Homiletics and Social Communications at Saint Charles Borromeo Seminary in the Archdiocese of Philadelphia, where he also directs the Catholic Preaching Institute.

He entered the religious congregation of the Oblates of St. Francis de Sales (O.S.F.S.) in 1980, was ordained to the diaconate in St. Peter's Basilica (Rome) in 1986, and was ordained to the priesthood in St. Anthony of Padua Church (Wilmington, DE) in 1987.

He earned his doctoral degree in Biblical Theology at the Pontifical Gregorian University (Rome) and is a member of the Academy of Catholic Theology and the Catholic

Association of Teachers of Homiletics.

He has written, edited, or translated ten books and authored more than eighty contributions in a variety of scholarly and pastoral publications. His commentaries have appeared in news outlets and on digital media nationwide. He has given academic lectures, pastoral presentations, or spiritual conferences in dioceses throughout the USA and abroad.

He is featured among the members at CatholicSpeakers.com and has appeared on television, radio, and podcast programs in both regional and national markets.

Among other awards, he has been selected four times for inclusion in Who's Who Among America's Teachers.

MEET THE SPEAKERS

WHERE FAITH MEETS THE FUTURE: FAMILY CONVERSATIONS IN LEGACY PLANNING

Presented by: Louis N. Teti, Esq.

As you begin your financial and estate planning, learn how starting with meaningful, faith-centered conversations with your family can ensure your that values are passed on alongside your assets.



Louis (Lou) N. Teti, Esquire is a past President of the Pennsylvania Bar Association, the Chester County Bar Association, and a past Chair of the Disciplinary Board of the Supreme Court of Pennsylvania.

Lou has been practicing law for fifty years and is a Fellow of the American College of Trust and Estate Counsel. He has an LLM in Taxation and has also earned his Chartered Adviser in Philanthropy (CAP) designation.

His consulting practice is now focused in the areas of legacy and philanthropic planning and the importance of conducting intergenerational family meetings to understand and sustain the family's legacy plan. He also consults with and assists non-profit organizations in developing and strengthening their planned giving programs.

Lou serves on the board of trustees of Bishop Shanahan High School and previously served on the board of trustees of Malvern Preparatory School, where he chaired the Academic Mission Committee, the Bylaws Committee, and the Development and Planned Giving Committee. He is the past Chair of the Boards of the Paoli Hospital Foundation and the Chester County Community Foundation, has served on Paoli Hospital's Board since 1997, and currently serves as Chair of the Paoli Hospital Planned Giving Committee, and the Main Line Health Planned Giving Committee. Lou is also a member of The Catholic Foundation's Professional Advisors Alliance.

Lou and his wife, Joann, reside in Downingtown, PA and are parishioners at Sts. Philip and James Parish in Exton, PA.

MEET THE PANELISTS

PASSING ON THE GIFT: PHILANTHROPY FROM A CATHOLIC PERSPECTIVE

Panelists:

Scott and Susan Cryder | Ken and Lisa Ewell | Howard Stoeckel

Through personal stories and practical insights, panelists will highlight how intentional giving strengthens families, deepens discipleship, and helps families live out their call to love God and serve others.



Scott and Susan Cryder have been married for 53 years settling in Chalfont, PA where they raised their three sons. Both Scott and Susan are 25+ year retreatants at the Malvern Retreat House where they still experience ‘Gods Peace’ every time they enter the grounds for their annual retreats.

While living in Chalfont, they spent 45 years as active members of St Jude Parish, supporting numerous ministries. Susan served as Lector and PREP teacher and as a member of the St. Vincent de Paul Society, Our Lady’s Prayer Chain and Adoration Ministry. Scott held positions as Treasurer and President of the St. Jude Home and School, Chairman of the Capital Campaign for the Renovation of the Church and member of the Finance Committee and parish choir

(serving as principal Cantor for nearly 25 years). Both Scott and Susan served as Extraordinary Ministers of Holy Communion for many years.

Within the past two years, Scott and Susan have moved into Christ’s Home Continuing Care Senior Community in Warminster, PA. They are currently parishioners at Nativity of Our Lord and were recently invited to serve as Extraordinary Ministers at that parish.

It was during this time that they established and funded a donor-advised fund that is used to make major grants available to charities and institutions, like Malvern, that they have supported for many years.

The chief beneficiary of Scott and Susan’s annual giving has been the Archdiocese of Philadelphia. Along with contributions to their local parish collections, Scott and Susan have provided long time financial assistance to the Annual Seminary Appeal and Catholic Charities. Outside of the Archdiocesan collections, they favor organizations such as Christ’s Home Children’s Services, North Care Women’s Clinic of Lansdale, and Guiding Star Ministries (part of the Pro-Life Union of Greater Philadelphia) all of which protect and promote life. They also support organizations that respond to human crisis that affect the supply of food, shelter, and clothing in areas incurring disaster and war around the globe irrespective of culture or religion through The World Central Kitchen Program.



Ken and Lisa Ewell have been married for 40 years and have four children and eight grandchildren. They are members of St. Joan of Arc Parish in Marlton, NJ.

Ken is the former President & COO of Graham Company, a division of Marsh McLennan, where he currently serves as Vice Chairman. Ken is highly active within the insurance and business community. He serves on multiple insurance company advisory boards and is a board member of The Council of Insurance Agents & Brokers (CIAB). In addition, Ken lends his experience and guidance as a board member of The Catholic Foundation of Greater Philadelphia. Ken and Lisa both volunteer their time for Grace Place for Children as board and committee members, and lend their time to a number of other charitable organizations that reflect their

shared values.

Deeply committed to the mission of the Church, they are major supporters of several Catholic organizations, including St. Joseph's Preparatory School, Saint Charles Borromeo Seminary, the Catholic Land Movement and The Catholic Foundation of Greater Philadelphia. Their philanthropy reflects a thoughtful and faith-filled approach to stewardship, centered on strengthening the Church and serving those in need.

At The Catholic Foundation, Ken and Lisa established a donor-advised fund to support Catholic organizations closest to their hearts. They believe the Foundation provides a meaningful and effective way to make a lasting difference, both by caring for those who are less fortunate and by helping to ensure a vibrant future for the Catholic Church for generations to come.



Howard Stoeckel is the former CEO and Vice Chair for Wawa. In semi-retirement he has authored two books on the Wawa culture. He has served Wawa for four decades.

Howard and his wife Marietta are members of St. Robert Bellarmine Parish in Warrington, PA. They have three children, seven grandchildren and two great grandchildren.

Howard and Marietta have always been impressed with the young priests coming out of Saint Charles Borromeo Seminary and concerned about the shortage of priests. Following several meetings with former Rector, Bishop Timothy Senior, and emeritus board member of The Catholic Foundation, Msgr. Francis Beach, Howard and Marietta learned more about the needs of the seminary and established an endowment fund for priestly formation. This

relationship grew deeper when the new seminary was built and Howard and Marietta provided the gift to build the Immaculate Conception Chapel. In addition, they are major supporters of Catholic Charities and have a donor-advised fund to support Catholic charities organizations.

Howard and Marietta feel supporting The Catholic Foundation is a wonderful way of supporting the future of the church and helping those less fortunate. This investment shapes our charitable legacy for future family generations and will survive the test of time. The Catholic Foundation gives them "peace of mind" that their charitable dollars are being safeguarded and well spent.

MEET THE SPEAKERS

ANSWERING THE CALL: PUTTING YOUR CATHOLIC LEGACY INTO PLACE

Presented by: Denis Gray, Esq.

Discover how simple charitable planning techniques and approaches can express your values, benefit your family, and further the work of the Church and our faith community.



Denis Aloysius Gray, Esquire is a partner at Palmer & Gray LLP located in Wayne and Great Valley, Pennsylvania. He has been admitted to practice in Pennsylvania for thirty-five years concentrating in estate planning, corporate law as well as business and real estate transactions. Denis also advises non-profits, local churches, and religious orders on various legal issues.

Prior to entering law school, he was a Certified Public Accountant and worked for a national insurance company.

Denis served twenty-two years as a School Board Director for Haverford Township School District and was President of the Board for eighteen years. He also served as a board member of the PIAA District One Committee, The Timothy School, Dunwoody Village, and a local music school. He was appointed as Discipline Hearing Committee Member by the Pennsylvania Supreme Court and served for eighteen years. Denis is currently a member of The Catholic Foundation's Professional Advisors Alliance.

He obtained a BS in Accounting from St. Joseph University, and a JD from the Widener University School of Law.

Denis and his wife, Dawn are the proud parents of four children and two grandchildren. They are members of St. John Neumann Parish in Bryn Mawr, Pennsylvania.

MEET THE SPEAKERS

CHURCH TEACHING AT THE END OF LIFE: THE MEANING OF YOUR FINAL CHAPTER AS A CATHOLIC

Presented by: Dr. Daniel A. Drain

Examine Catholic teaching on death and dying, offering a faithful perspective on the dignity of life at its natural end, and consider the spiritual meaning of death and how Church guidance can inform compassionate end-of-life decisions.



Dr. Daniel A. Drain grew up in Toledo, OH and converted to Catholicism at age 17. After initial studies in Philosophy and Theology at DeSales University, he attended the Pontifical John Paul II Institute for Studies on Marriage and Family, earning both an MTS and PhD (Theology, with specialization in Person, Marriage, and Family).

A scholar of Hans Urs von Balthasar's theology, the themes of his research and publication also include eschatology, the nature of Catholic education, sex and gender issues, and fundamental theology. His first book, *Saving Finite Freedom: Hope, Freedom, and Salvation in Hans Urs von Balthasar's Theology of Redemption* is forthcoming from Wipf & Stock in 2026.

Locally, he has taught at DeSales University, Immaculata University, and was a full-time faculty member at St. Bernard's School of Theology and Ministry in Rochester, NY.

He lives in Bucks County, PA, with his wife and daughter, and is honored to serve now as the Director of the Office for Life and Family for the Archdiocese of Philadelphia and as a professor of systematic theology at St. Charles Borromeo Seminary. He is an Ordinary Member of the Sacra Doctrina Project, a peer reviewer for *Word on Fire Academic* and *The Linacre Quarterly*, serves on the editorial board of *Lux Veritatis: A Journal of Speculative Theology*, and is an appointed member of the Advisory Council of the Administrative Committee of the United States Conference of Catholic Bishops.



You decide
where to
give.
We help
make it go
further.

thecfcp.org

As an independent community foundation, we are your trusted source for all Catholic charitable and philanthropic resources — offering the tools, guidance, and transparency you need to be certain your generosity supports the causes that matter most to you.

At The Catholic Foundation, your giving is our mission.



Your Gift. Your Intent. Our Promise.

Our philanthropic experts can help you establish a charitable fund, screened for Catholic values, through a tax-advantaged gift today or a future planned gift:

- Donor-Advised Funds
- Endowment Funds
- Named Family Funds
- Memorial Funds
- Scholarship Funds



Start the conversation at
(215) 587-5650 or contactus@thecfcp.org.

Plan Today. Secure Tomorrow.

Become a Member of the Good Shepherd Society

The Good Shepherd Society honors individuals who have made generous commitments to Malvern Retreat House (MRH) that extend beyond a lifetime.

These philanthropic leaders have named Malvern Retreat as a beneficiary in their estate plans or by making a life-income gift. The Good Shepherd Society is our way of recognizing the profoundly personal and meaningful commitments of retreatants that will ensure the

Legacy of Faith



The Good Shepherd Society, Frequently Asked Questions

- **What are the most common ways to include Malvern Retreat House in my estate plan?**
- **Bequests:** A simple provision in a will or living trust.
 - **Beneficiary Designations:** Considered the most tax-efficient way to give. It names Malvern Retreat House as a beneficiary of a retirement account (like an IRA, 401(k), or 403(b)) or a life insurance policy.
 - **Charitable Gift Annuities (CGAs):** For donors looking for fixed income, a CGA allows you to make a gift and receive fixed payments for life.
- **Is there a way to be recognized for my future gift during my lifetime?**
- **Membership in the Good Shepherd Society.**
 - **Symbol of Membership:** Members receive a special Good Shepherd membership pin.
 - **Recognition:** Members have their names engraved on a plaque.
 - **Purpose:** To memorialize those who have chosen to say "Thank you" for a lifetime of spiritual gifts received on the retreat grounds.
- **How will my legacy gift be used to support the retreat house?**
- Legacy gifts typically fall into three categories:
- **General Mission Support:** Supporting the daily operations and programs that serve near 20,000 retreatants annually.
 - **Capital & Sacred Space Improvements:** Past major gifts have funded specific projects like the expansion of the Blessed Carlo Acutis Shrine, the installation of the St. John Paul II Cross, and renovations to the Greco Family Memorial Hall.
 - **Endowment:** Ensuring that Malvern remains a "Legacy of Faith, Healing, and Peace" for future generations.

Interested in becoming a member of the Good Shepherd Society?

Contact Jim Catrambone,
Director of Development
jcatrambone@malvernretreat.com
(484) 321-2531

malvernretreat.com



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2025-2026 Breakdown

- Q1 - Q2 - Q3 Results (Jul - Mar)
- Q4 Potential Impact (Apr - Jun)

Encounters

- 100,000+ (Primarily Schools)
- 200,000+ (Schools & Diocesan)

To learn more:

Contact Rob Longo
Rob@LiveVertical.org
717-269-5341
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Let's renew the Church.

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Learn more online at whymsc.org or email our president, Deacon Chris Roberts, at croberts@martinsaintsclassical.org.



“We really do have a duty to the future generations.”

Gilbert Keith Chesterton



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Charles J. Bramley, CPA
cbramley@withum.com



The Rohr Group
Peter A. Rohr, CFP,[®] CIMA,[®] CPWA,[®] CRPC,[®] CSRIC[®]

1650 Market Street Floor 29
Philadelphia, PA 19103

(610) 971.6608



Alvin Clay Financial Advisors LLC
309 York Rd Suite 215, Jenkintown, PA 19046
267-626-2382 / info@alvinclay.com /
www.alvinclay.com



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Your Legacy Is More Than Assets

It is what your family carries forward
It is the faith you practice
It is the impact you choose to make

We advise families on aligning wealth with purpose
through disciplined planning, thoughtful investing,
and intentional legacy design.

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