



The Roman Catholic Diocese of
BATON ROUGE
FINANCIAL AFFAIRS

DIOCESAN FINANCE COUNCIL AGENDA
MEETING OF September 5, 2024
CATHOLIC LIFE CENTER, 2:00 P.M.

- 1) Approval of June 6, 2024 minutes
- 2) Review of financial information
 - a. Financial statements for the year ended June 30, 2024
 - b. Income and expense detail for the year ended June 30, 2024
 - c. Deposit & Loan investment performance
 - d. Priest Retirement activity and investment performance
- 3) Child Nutrition Program budget for the year ended June 30, 2025
- 4) Catholic Charities DBR budget for the year ended June 30, 2025
- 5) CAP Trust – market update, portfolio review
- 6) Other Business

Future Meeting Dates (tentative agenda items):

- **December 5, 2024, 2pm** (09/30/24 internal financial statements)
- **March 6, 2025, 2pm** (12/31/24 internal financial statements)
- **June 12, 2025, 2pm** (03/31/25 internal financial statements, presentation of 2025-26 annual budget)
- **September 11, 2025, 2pm** (06/30/25 internal financial statements, pension plan valuations)
- **December 11, 2025, 2pm** (09/30/25 internal financial statements)