



Archons
OF THE Ecumenical
Patriarchate®

Protecting the Future of Faith®

The Genesis, Formation
and Development
of the



ECUMENICAL PATRIARCH
BARTHOLOMEW FOUNDATION

For the Sacred See of Saint Andrew

A Documentary History

January 17, 2026

INTRODUCTION

This paper, entitled “The Genesis, Formation, and Development of the Ecumenical Patriarch Bartholomew Foundation, A Documentary History (hereinafter referred to as the “Genesis Document”), provides a documentary history of the genesis of the Ecumenical Patriarch Bartholomew Foundation: For the Sacred See of Saint Andrew (hereinafter the “EPBF”), tracing its origins from early discussions of an Ecumenical Patriarchal endowment (2000) to structured planning and committee work (2018), legal formation (2018), legal establishment of the non-profit corporation in the State of New York (January 17, 2019) and early operational milestones (2018-2020). The documentary record reflects that the initiative was advanced through the vision and drive, and the sustained support of the Order of Saint Andrew the Apostle, the Archons of the Ecumenical Patriarchate in the United States of America (hereinafter referred to as the “AEP”) under the leadership of the AEP National Commander, Archon Grand Aktouarios, Dr. Anthony J. Limberakis, Chair of the EPBF Board of Trustees (hereinafter “Archon National Commander, Dr. Limberakis”), with the spiritual and developmental guidance throughout by the Rev. Grand Protopresbyter Fr. Alexander Karloutsos (hereinafter “Fr. Alex Karloutsos”). (Exhibit G).

Without Archon National Commander, Dr. Limberakis’ drive and vision we would not have an EPBF. As he has described in his own account, the aspiration to establish a Patriarchal endowment was his long-held dream dating to his appointment as National Commander in 1998. In earlier years, the AEP’s priority focus was necessarily directed to the existential religious freedom challenges confronting the Holy Mother Church; by 2018, the work to establish a permanent foundation to strengthen the Ecumenical Patriarchate’s financial independence was formally launched. (Exhibit G).

The EPBF is a charitable foundation established to help secure the long-term financial underpinnings of the Ecumenical Patriarchate of Constantinople and to strengthen the capacity of the Holy Mother Church to sustain her global ministries. In the Foundation’s own language, its mission is to provide enduring support so that “the Light ... continues to shine in the darkness,” and so that the apostolic witness and ministry of the Ecumenical Patriarchate may be strengthened for generations to come. The EPBF’s mission is to provide the financial independence for the Ecumenical Patriarchate *in perpetuity*. The EPBF’s establishment has also been described as a watershed event in the history of the Ecumenical Patriarchate. (Exhibits G and H).

The narrative also acknowledges the formative role of the 2018 Athenagoras Human Rights Award Banquet honoring Rev. Fr. Alex Karloutsos and Presbytera Xanthi Karloutsos—an event that raised a record \$1.4 million and provided the pivotal seed funding for what would become the EPBF. (Exhibit G).

This Genesis Document also details the EPBF’s expanded visibility and momentum during the subsequent growth phase and consolidates key dates, decisions, meetings, and legal milestones in a clear chronology, supported by primary documents and official organizational publications.

PURPOSE AND SCOPE

The Genesis Document evidences the EPBF’s institutional history for (a) internal archival purposes; (b) presentation to Church leadership as appropriate; and (c) future refinement into a publishable historical record. It emphasizes the period from the earliest identified proposal (2000) through the EPBF’s legal formation (2018) and legal establishment (January 17, 2019) and initial operational milestones (2018-2020).

The history highlights the EPBF’s development as a multi-year effort that combined the leadership of the AEP, the original key-players, prior to the existence of a formal Board of Trustees of the EPBF as well as the founding members of the Board of Trustees of the EPBF, careful governance design, donor stewardship, and, at key milestones, formal approval by His All-Holiness Ecumenical Patriarch Bartholomew and ecclesial engagement and leadership by newly enthroned Archbishop Elpidophoros of the Greek Orthodox Archdiocese of America.

The AEP and EPBF are grateful to the following Archons for their contributions to the Genesis Document including Archon National Commander, Dr. Limberakis; Archon National Vice Commander, the Honorable B. Theodore Bozonelis; Archon Legal Counselor, Peter Kakoyiannis, Esq.; Archon Legal Counselor Emeritus, Christopher Stratakis, Esq.; Archon George E. Safiol; and Archon Michael D. Camarinos, Esq.

PREAMBLE: THE ORDER OF ST. ANDREW AS INSTITUTIONAL CATALYST

The AEP is the preeminent Archon body worldwide owing to its historic leadership, substantial organizational capacity, membership exceeding 700 distinguished Archons, and exceptional contributions to global advocacy, education, and philanthropy. (Exhibit H).

Under the leadership of the Archon National Commander, Dr. Limberakis, and with the spiritual and developmental guidance of Fr. Alex Karloutsos, over a period of nearly 30 years, the AEP expanded the reach, influence, and effectiveness of its sacred mission—particularly in defense of the religious freedom, institutional vitality and economic security of the Ecumenical Patriarchate. (Exhibit H).

The AEP's capacity was essential to the creation of the EPBF. The EPBF did not emerge in isolation; it was made possible by decades of donor cultivation, program development, and successful Archon initiatives that created a philanthropic culture of giving oriented toward the needs of the Holy Mother Church. In this sense, the EPBF represents a crowning institutional achievement of the AEP because of the AEP's multi-decade development as a philanthropic and advocacy powerhouse. *Yet the AEP/Archons' work was never just about donor cultivation. Far from it.* The AEP has a strong leadership team which is truly engaged, embodying the Diakonia, freely and emphatically giving their time, talent, and treasure to support the future of faith, as well as safeguard and defend the Holy Mother Church with steadfast devotion and attentive stewardship.

The AEP's scale of support is documented in its official reporting: that from 2002 to 2024 the AEP raised \$65,678,376 in direct and indirect support of the sacred mission of the Ecumenical Patriarchate. That total includes \$24,344,085 in collective pledges and bequests (2020-2024) received by the EPBF. In more recent reporting, the EPBF has surpassed the \$30 million milestone, with total assets now exceeding \$31 million. (Exhibits H and I).

Accordingly, a key interpretive point for this history is that the philanthropic appetite and donor commitment needed to launch a major foundation for the Ecumenical Patriarchate was developed within the AEP's programs and stewardship culture over many years. The EPBF is best understood as an outgrowth of that mature donor ecosystem of the AEP; without that cultivated institutional capacity and donor base, the EPBF would not have been possible.

From the very beginning, transparency and accountability have been foundational financial principles of the EPBF, thereby giving donors confidence in the stewardship of their gifts and pledges.

Mission Snapshot (as reflected in official EPBF and Archon/AEP communications):

Provide Financial Security: Establish a reliable foundation to support the worldwide ministries of the Ecumenical Patriarchate.

Strengthen Global Orthodox Presence: Support the Ecumenical Patriarchate's capacity for pastoral leadership, religious diplomacy, and engagement on the global stage as the *primus inter pares* of Orthodoxy.

Foster Unity and Dialogue: Strengthen the Ecumenical Patriarchate's ministry of unity and dialogue within Orthodoxy and beyond.

Expand Humanitarian and Educational Outreach: Enable broader charitable, humanitarian, and educational initiatives consistent with the Ecumenical Patriarchate's global witness.

METHODOLOGY AND SOURCE BASE

This Genesis Document is based on: (a) primary documents provided for review, including meeting agendas, meeting minutes, and legal filings; (b) official organizational publications of the AEP; and (c) official EPBF publications describing its establishment.

For purposes of clarity and future compilation into an evidentiary appendix, primary documents are cited by descriptive title (e.g., “Meeting Minutes – May 11, 2018”) and treated as exhibits. Public-facing sources are cited by organizational author, title, and publication format. Public-facing web sources have been captured as PDF printouts and included as Exhibits G-I.

CHRONOLOGICAL NARRATIVE (2000-2019)

1. THE FIRST DOCUMENTED EPBF PROPOSAL: PHANAR MEETING (2000)

The first documented proposal for the EPBF appears in the agenda for Archon National Commander, Dr. Limberakis’s meeting with His All-Holiness Ecumenical Patriarch Bartholomew at the Phanar on August 31, 2000. The agenda includes a specific line item addressing the “Foundation for the Ecumenical Patriarchate,” evidencing that the concept of a dedicated foundation to support the Ecumenical Patriarchate was raised at the highest level as early as 2000. (Exhibit A) This 2000 proposal was a visionary seed: it framed the need for sustainable financial support for the Ecumenical Patriarchate and planted the long-term aspiration for a Patriarchal foundation.

The foundation concept addressed a practical and longstanding challenge: unlike many major religious institutions, the Ecumenical Patriarchate historically lacked a consistent endowment structure capable of underwriting its worldwide ministries *in perpetuity*. The long-range purpose of a Patriarchal foundation was therefore not merely to raise funds, but to strengthen the institutional stability and independence necessary for the Ecumenical Patriarchate to carry out its apostolic mission with confidence and continuity—ensuring, as the Foundation has expressed it, that “the voice of the Apostolic Throne of Andrew never goes silent.” (Exhibit G).

2. BUILDING THE CAPACITY: TWO DECADES OF AEP ADVOCACY AND PHILANTHROPY (2000-2018)

From 2000 onward, the AEP, substantially expanded its capacity as a philanthropic and advocacy powerhouse. Its religious freedom programming, educational work, and high-profile philanthropic events, cultivated an engaged donor base and built the institutional credibility required to launch a major foundation. By the time formal planning for the EPBF began, the AEP’s donor network had already been developed through sustained campaigns and stewardship culture. (Exhibit H).

3. STRUCTURED PLANNING: BYLAWS DRAFTING AND GOVERNANCE DESIGN (2018)

By 2018, the AEP’s leadership began systematic work to transform the founding vision for the EPBF into a structured institution. From the outset, the planning meetings were conducted with intentional discretion and deference, and—rather than convening at Archdiocesan headquarters—were held off-site. Archon John A. Catsimatidis generously made his company’s boardroom in New York available for this work, and the committee’s sessions became known for detailed and substantive review. The governance framework and bylaws were approached with rigor, reflecting a shared commitment to get it right and to build a durable institution worthy of its sacred purpose. In fact, the development of the bylaws took place word-by-word and line-by-line. Deliberately and with due consideration.

The effort was supported by legal and tax expertise, including renowned attorney Archon Thomas Constance and counsel at his firm with experience in trusts, estates, and nonprofit governance, and it proceeded with the ongoing spiritual and developmental guidance of Fr. Alex Karloutsos.

This planning period was instrumental to the EPBF’s founding because it demonstrates that the EPBF was conceived as a properly governed, enduring institution—not an ad hoc fundraising effort—and that its vision was being operationalized through governance design, legal preparation, and disciplined institutional planning in advance of its initial launch and early operations.

4. COMMITTEE AUTHORIZATION AND FIRST FORMAL MEETING (MAY 11, 2018)

On May 11, 2018, under the leadership of Archon National Commander, Dr. Limberakis, the National Council of the AEP established a formal committee to seek the “ways and means” to create a Patriarchal foundation dedicated to fortifying the financial underpinnings of the Ecumenical Patriarchate. On the same date, the committee convened its inaugural organizational meeting at the New York office of Archon John A. Catsimatidis. (Exhibits B and G).

The inaugural organizational meeting for what would become the EPBF was convened by Archon National Commander, Dr. Limberakis and chaired by Archon George E. Safiol, with Archons John A. Catsimatidis and Michael G. Psaros serving in vice-chair/co-chair leadership capacities. The original committee also included officers of the AEP—National Vice Commander John Halecky, Jr., National Secretary Hon. B. Theodore Bozonelis, and National Treasurer Peter J. Skeadas—as well as Archons with legal, financial, and business expertise, including Archon Peter Kakoyiannis, Esq. and Archon Christopher Stratakis, Esq. Spiritual and developmental guidance was offered by the AEP’s Spiritual Advisor, Fr. Alex Karloutsos, who actively participated in the committee’s work, including the series of monthly meetings held in Archon Catsimatidis’s boardroom. (Exhibit G).

The organizational committee’s first formal meeting occurred on May 11, 2018 at the New York office of Archon John A. Catsimatidis. The meeting minutes document committee organization, confirm leadership roles, and establish the beginning of an ongoing meeting cadence. They also reflect a disciplined focus on governance objectives, including the drafting and careful review of bylaws and related formation documents, with early engagement of professional advisors to ensure that the Foundation would be established with institutional rigor, transparency, and accountability from the outset. (Exhibit B).

Early deliberations also addressed donor stewardship and recommended giving levels for what was then referred to as the St. Andrew Endowment Fund. Archon George E. Safiol proposed the adoption of tiered giving commitments, including a FOUNDERS level set at a \$100,000 pledge, and he reinforced his recommendation by making such a commitment himself. In subsequent phases, as the EPBF’s stewardship and planned-giving model matured, additional participation categories (including “Builders”) were introduced; however, the FOUNDERS model originated in the founding leadership’s own planning and deliberation. (Exhibit B).

5. NATIONAL COUNCIL AGENDA INTEGRATION (JUNE 8, 2018)

By May 11, 2018, the patriarchal foundation initiative, which would become the EPBF, was formally integrated into the AEP’s National Council work plan. A National Council agenda dated June 8, 2018 includes a specific line item for a Foundation Committee report and identifies committee leadership roles, including Archon George E. Safiol as Chair and Archons John A. Catsimatidis and Michael G. Psaros as Vice Chairs. This agenda placement provides documentary evidence that the foundation initiative was an authorized National

Council priority—reviewed, monitored, and advanced within the AEP’s governance structures during 2018. (Exhibit C).

6. SEED FUNDING DECISION: 2018 ATHENAGORAS HUMAN RIGHTS AWARD BANQUET

The defining early step was the AEP’s decision to donate all of the proceeds of the 2018 Athenagoras Human Rights Award Banquet as the seed funding for the EPBF. When Fr. Alex Karloutsos and Presbytera Xanthi Karloutsos were selected as honorees, the National Council voted *to earmark all of the donations raised* from the event exclusively for the establishment of the EPBF to support the Ecumenical Patriarchate. The 2018 Athenagoras Human Rights Award banquet raised a record \$1.4 million and these monies constituted the EPBF’s initial funding from the AEP. (Exhibit G).

7. LEGAL FORMATION: INCORPORATION IN NEW YORK (JANUARY 17, 2019)

The EPBF was legally established on January 17, 2019, when it was incorporated by the State of New York as a charitable entity. The initial corporate name was the “St. Andrew Ecumenical Patriarchal Fund.” The Board later approved a name change to the “Ecumenical Patriarch Bartholomew Foundation” to honor His All-Holiness Ecumenical Patriarch Bartholomew, which was reflected in New York corporate filings. (Exhibits G and J). Primary documentary exhibits supplied for this history include the New York Certificate of Incorporation and related charitable entity documentation. (Exhibits D and E).

The EPBF’s evolving name also reflects its identity and purpose. While the original corporate name emphasized St. Andrew—patron Saint of the Holy Mother Church of Constantinople and the Archons’ own identity as the AEP—the later adoption of the name His All-Holiness Ecumenical Patriarch Bartholomew, the longest-serving Ecumenical Patriarch in history, made the intent of the EPBF unmistakable: a lasting institutional tribute honoring His All-Holiness Ecumenical Patriarch Bartholomew *in perpetuity*. (Exhibit G).

8. LEADERSHIP TRANSITION IN AMERICA (MAY-JUNE 2019)

In May and June 2019, the Greek Orthodox Archdiocese of America experienced a leadership transition. The election (May 11, 2019) and enthronement (June 22, 2019) of His Eminence Archbishop Elpidophoros of America were milestones that supported the EPBF's significant forward momentum and strengthened visibility. (Exhibit G).

His Eminence Archbishop Elpidophoros of America, the Exarch, on September 7, 2019, issued a formal letter from His All-Holiness Ecumenical Patriarch Bartholomew to Archon National Commander, Dr. Limberakis, expressing paternal joy for the AEP's 2018 Athenagoras Human Rights Award banquet honoring Fr. Alex and Presbytera Xanthi Karloutsos and stating His All-Holiness' desire to transfer the \$1.4 million in funds raised at that banquet—restricted for the use of the Ecumenical Patriarchate—to the St. Andrew Ecumenical Patriarchal Fund Incorporated, under the Certificate of Incorporation filed on January 17, 2019, for its direct management and supervision. (Exhibit K).

9. EPBF BOARD MEETING AND LETTER OF PATRIARCHAL APPROVAL (DECEMBER 2019)

On December 13, 2019, the meeting of the full Board of Trustees of the EPBF (then the “St. Andrew Ecumenical Patriarchal Fund”) was held at the Greek Orthodox Archdiocese of America in New York. (Exhibit I). At that meeting, His Eminence Archbishop Elpidophoros of America discussed a letter that he received from His All-Holiness Ecumenical Patriarch Bartholomew addressed to Archon National Commander, Dr. Limberakis dated November 21, 2019, in which His All-Holiness approved the proposed EPBF bylaws and indicated that His All-Holiness was “pleased that His Eminence, Archbishop Elpidophoros of America, who also serves as our Exarch in the United States, will serve as our representative on the Ecumenical Patriarchal Fund.” (Exhibit M). At this meeting, His Eminence Archbishop Elpidophoros of America praised the vision and leadership of Archon National Commander, Dr. Limberakis and the AEP in establishing and leading the EPBF. (Exhibit I).

At this meeting, the Board of Trustees elected its officers—Archon National Commander, Dr. Anthony J. Limberakis as Chair, Archon George E. Safiol as Vice Chair, Archon Peter Kakoyiannis, Esq. as Secretary, and Archon Michael G. Psaros as Treasurer—and appointed committee chairs to advance core functions of the EPBF, including Archon John A. Catsimatidis as the initial Investment Chair and Fr. Alex Karloutsos as the initial Development Chair, who later deferred to become the Spiritual Advisor. (Exhibit I).

In the early operational phase of the EPBF, formal and substantive Investment and Audit Committees were established. Archon National Commander, Dr. Limberakis, and EPBF Chair, appointed Archon John S. Koudounis—an internationally respected investment banker, financial investor, and Chief Executive Officer of Calamos Investments—to serve as Chair of the Investment Committee of the EPBF, which was composed of both seasoned professionals and emerging leaders in the field. Archon Carl R. Hollister was appointed as Chair of the Audit Committee of the EPBF. Archon Hollister is a decorated Green Beret, former Supreme President of AHEPA, and current Executive Director of the St. Photios National Shrine. With the establishment of these two substantive committees, the EPBF ensured robust financial accountability, and transparency; the paramount pillars upon which the EPBF is based.

The EPBF’s establishment narrative further notes that, during organizational deliberations, the founding leaders felt strongly that women should serve on the Board of Trustees; two outstanding women worthy of such appointment to serve as trustees are Maria Allwin and Aphrodite Skeadas. (Exhibit G).

10. INAUGURAL FOUNDERS DINNER—CULMINATION OF THE EPBF GENESIS PERIOD (OCTOBER 29, 2021)

The presence of His All-Holiness Ecumenical Patriarch Bartholomew at the Inaugural FOUNDERS Dinner on October 29, 2021 in New York, New York during Archon Weekend provided the needed impetus to encourage scores of new faithful to become FOUNDERS—*157 FOUNDERS and more than \$18 million in pledged donations were realized by the time of the Inaugural FOUNDERS Dinner*—stepping-up to secure the economic future of the EPBF.

This achievement is especially notable when viewed against the backdrop of a global pandemic. At a time marked by widespread societal retreat, donor uncertainty, economic paralysis, and the permanent closure of countless businesses, the leadership of the AEP—under the guidance of the Archon National Commander, Dr. Limberakis—and the EPBF leadership team was neither

deterred nor diminished. Despite overwhelming odds, they successfully realized this landmark AEP-EPBF milestone, affirming both the resolve of the AEP/Archons and the enduring moral authority of the Ecumenical Patriarchate.

The Inaugural FOUNDERS Dinner of the EPBF was originally planned for 2020 as the first formal gathering following incorporation, Patriarchal approval, and federal tax-exempt recognition. Owing to circumstances beyond the EPBF's control, the inaugural dinner was deferred as a result of the COVID-19 pandemic and ultimately convened on October 29, 2021, in the presence of His All-Holiness Ecumenical Patriarch Bartholomew. (Exhibit I).

Attendance was intentionally limited to FOUNDERS only, reflecting the deliberate and symbolic character of the occasion—those donors who have pledged or donated in excess of \$100,000 to the EPBF. The dinner was held against the backdrop of formal Patriarchal correspondence affirming the establishment and stewardship of the EPBF. (Exhibits I and K).

The program underscored the EPBF's growing public profile. Former United States Secretary of State Michael R. Pompeo delivered the keynote address and Archon National Commander, Dr. Limberakis presented the EPBF's vision and reported that \$18 million had been raised by 157 Founders, including a \$1 million matching grant from the Nicholas J. and Anna K. Bouras Foundation guided by AEP National Vice Commander, Judge Bozonelis, the Trustee of the Bouras Foundation. (Exhibit I).

The Inaugural FOUNDERS Dinner thus marked the culmination of the EPBF's genesis period—bringing to completion more than two decades of vision and development, from the first documented proposal of a Patriarchal endowment in 2000, through structured planning and committee work in 2018, legal formation, Patriarchal approval and federal tax-exempt recognition in 2019. The evening served as a moment of consolidation and affirmation, formally uniting the FOUNDERS around a shared commitment to provide enduring financial strength, stability, and independence for the Ecumenical Patriarchate, and signaling the EPBF's transition from formation to sustained institutional growth. (Exhibits A-F; Exhibit I).

11. EARLY OPERATIONAL MILESTONES AND GROWTH (2020-2025)

Following incorporation and the initial board meetings, the EPBF secured federal tax-exempt recognition. The EPBF's IRS 501(c)(3) application was approved with an effective date of January 17, 2019. (Exhibit F).

On October 23, 2020, the Board of Trustees met and, under the chairmanship of Archon National Commander, Dr. Limberakis, unanimously approved a proposed name change of the corporation from the St. Andrew Ecumenical Patriarchal Fund to the Ecumenical Patriarch Bartholomew Foundation (EPBF), which was subsequently formalized through New York corporate filings dated January 7, 2021. (Exhibit J). This action was taken as a lasting tribute to His All-Holiness Ecumenical Patriarch Bartholomew, the longest-serving Ecumenical Patriarch, Archbishop of Constantinople-New Rome in history. In fact, the central element of the EPBF's logo is the official ecclesiastical logo of His All-Holiness Ecumenical Patriarch Bartholomew; so in 50 or 100 years, when the EPBF has 100s of millions of dollars, the Oikoumene will always be reminded of the extraordinary and historic legacy of His All-Holiness Ecumenical Patriarch Bartholomew, *in perpetuity*.

As the EPBF moved from establishment into growth, it adopted a clear and replicable stewardship model centered on long-term commitments. A key feature of that model has been the FOUNDERS concept—leadership-level commitments of \$100,000 structured over ten years—which broadened participation across individuals, families, parishes, and allied institutions. This approach has enabled disciplined growth, strengthened donor confidence, and helped translate the AEP/Archons' decades of donor cultivation and credibility into sustainable foundation momentum.

Momentum has continued with the EPBF role in providing long-term resources for the Holy Mother Church. At the EPBF Board of Trustees breakfast meeting during Archon Weekend 2025 in New York, the Foundation officers reported that total assets had surpassed the \$30 million milestone for the first time, now exceeding \$31 million, and the Board approved the independent auditor's report on the 2024 financial statements. (Exhibit I).

Consistent with its purpose, the EPBF has been framed not as a narrow or local project, but as a global invitation to unity in stewardship founded and led by the AEP *since its genesis*. The EPBF is a “global mission and invitation” calling the faithful across the Eparchies of the Ecumenical Patriarchate “to be united as one.” This emphasis reinforces the EPBF’s long-term purpose: strengthening the Ecumenical Patriarchate to serve the entire Orthodox world through stable, sustained support *in perpetuity*. (Exhibit G).

CONCLUSION

The EPBF is best understood as a living institutional expression of faithful stewardship: carefully designed, responsibly governed with complete transparency and accountability, and energized by the love for the Holy Mother Church. In the spirit first enunciated by St. John Chrysostom, Archbishop of Constantinople, on September 14, 407, “Glory to God for all things.” (Exhibit G). The EPBF’s purpose is not simply institutional success in financial terms; it is the preservation and strengthening of the Ecumenical Patriarchate’s ability to serve—so that the Light of the Phanar may continue to shine, and the Apostolic mission of the Sacred See of Saint Andrew may be sustained for generations to come.

APPENDIX A: CONDENSED TIMELINE (KEY MILESTONES)

August 31, 2000: Agenda item presented to His All-Holiness Ecumenical Patriarch Bartholomew regarding a Patriarchal Endowment (Exhibit A).

2018: Structured planning meetings; drafting of bylaws and governance design (Exhibit G).

May 11, 2018: First formal meeting of the AEP organizational committee to form the EPBF at the private office of Archon John A. Catsimatidis (Exhibit B).

June 8, 2018: National Council agenda includes Foundation Committee report; identifies leadership roles (Exhibit C).

October 2018: 2018 Athenagoras Banquet proceeds earmarked; record fundraising provides seed funding (Exhibit G).

January 17, 2019: Incorporation in New York as a charitable entity (Exhibits D and E; Exhibit G).

May 11, 2019 and June 22, 2019: Election and Enthronement of His Eminence Archbishop Elpidophoros of America (Exhibit G).

September 7, 2019: Patriarchal letter regarding transfer of 2018 banquet funds to the St. Andrew Ecumenical Patriarchal Fund Incorporated for direct management and supervision (Exhibit K).

December 13, 2019: Inaugural meeting; His All-Holiness Ecumenical Patriarch Bartholomew approves bylaws. (Exhibits I and M).

August 26, 2020: IRS 501(c)(3) approval effective January 17, 2019 (Exhibit F).

October 23, 2020: Board of Trustees meeting includes unanimous decision to change the corporate name to the Ecumenical Patriarch Bartholomew Foundation. (Exhibit J).

January 7, 2021: New York Certificate of Amendment filed to change the corporate name to the Ecumenical Patriarch Bartholomew Foundation Inc. (Exhibit J).

June 29, 2021: His Eminence Archbishop Elpidophoros of America's letter regarding Holy Eparchial Synod unanimous decision (June 16, 2021) for every Metropolis of the GOA to become FOUNDERS of the EPBF. (Exhibit L).

October 29, 2021: Inaugural FOUNDERS Dinner held (originally planned for 2020) in the presence of His All-Holiness Ecumenical Patriarch Bartholomew. (Exhibit I).

2002-2024: Documented growth of Archon/AEP support and donor base; \$65,678,376 raised and pledged. (Exhibit H).

October 17, 2025: Board of Trustees meeting during Archon Weekend 2025 reports total EPBF assets exceeding \$31 million. (Exhibit I).

December 13, 2025: EPBF Board of Trustees re-elects officers for 2026, including Dr. Anthony J. Limberakis as Chair and Archon George E. Safiol as Vice Chair (Exhibit I).

APPENDIX B: EXHIBIT INDEX

Exhibit A: Archon National Commander, Dr. Limberakis' Agenda for Meeting with His All-Holiness Ecumenical Patriarch Bartholomew – August 31, 2000 (agenda includes line item for Patriarchal Endowment/Foundation).

Exhibit B: Meeting Minutes – May 11, 2018 (organizational committee meeting held at the New York office of Archon John A. Catsimatidis).

Exhibit C: National Council Agenda – June 8, 2018 (Foundation Committee report; Archon George E. Safiol as Chair; Archons John A. Catsimatidis and Michael G. Psaros as Vice Chairs).

Exhibit D: Certificate of Incorporation – January 17, 2019 (New York; initial corporate name: “St. Andrew Ecumenical Patriarchal Fund”).

Exhibit E: New York Charitable Entity/Registration Confirmation – January 17, 2019 (supporting charitable status documentation).

Exhibit F: IRS 501(c)(3) Determination Letter – August 26, 2020 (effective date: January 17, 2019).

Exhibit G: EPBF Website (PDF) – “The Establishment of the Foundation” (bartholomew.foundation/establishment/).

Exhibit H: Archons/AEP Publications (PDF) – Archons FAQ and EPBF mission/description materials (archons.org), including relevant Annual Report excerpt(s) documenting Archon support totals.

Exhibit I: EPBF Website (PDF) – EPBF Foundation News/Updates (bartholomew.foundation), including materials documenting the December 13, 2019 inaugural Board meeting and Patriarchal approval letter, the Inaugural FOUNDERS Dinner (Oct. 29, 2021; keynote by former U.S. Secretary of State Michael R. Pompeo; \$18M raised by 157 FOUNDERS), and the Board of Trustees Breakfast Meeting at Archon Weekend 2025 (Oct. 17, 2025; \$31M milestone).

Exhibit J: New York Department of State Filing Receipt and Certificate of Amendment (filed Jan. 7, 2021) and Board of Trustees Meeting Minutes (Oct. 23, 2020) (name change decision and governance actions).

Exhibit K: Patriarchal Letter of His All-Holiness Ecumenical Patriarch Bartholomew to Archon National Commander, Dr. Limberakis – September 7, 2019 (transfer of 2018 banquet funds to the St. Andrew Ecumenical Patriarchal Fund Incorporated).

Exhibit L: Correspondence – June 29, 2021 (Holy Eparchial Synod unanimous decision of June 16, 2021 for every Metropolis to become an individual Founding Member of the EPBF).

Exhibit M: Patriarchal Letter of His All-Holiness Ecumenical Patriarch Bartholomew to Archon National Commander, Dr. Limberakis – November 21, 2019.

Exhibit A

Archon National Commander, Dr. Limberakis' Agenda for Meeting with His All-Holiness Ecumenical Patriarch Bartholomew – August 31, 2000 (agenda includes line item for Patriarchal Endowment/Foundation).

His All Holiness BARTHOLOMEW

August 31, 2000

Agenda

- I. Archon weekend program
 - A. Thursday, August 31st
 - i. Arrival from Tel Aviv
 - ii. Visit to Balukli Hospital & Home for the Aged
 - iii. Thursday evening free
 - B. Friday, September 1st
 - i. Indiction Service
 - ii. Afternoon
Meeting with government officials
Meeting with Brian Johnson & John Freely to discuss budget and other details of book (see sample book)
 - iii. Dinner hosted by Your All Holiness
 - C. Saturday, September 2nd
 - i. Departure for Halki; will Your All Holiness join the group or travel by private boat?
 - ii. American Consulate to send representatives; other consulates invited
 - iii. Press been invited
 - iv. Halki Program
 - a. See program attached
 - b. See Time Line
 - c. Modest contribution to be presented at close of symposium for Halki (to whom should it be presented; publicly or privately); offering honoraria to Metropolitan Chrysostomos and Prof. Stavrides
 - v. Evening free
 - D. Sunday, September 3rd
 - i. Divine Liturgy at Patriarchal Cathedral of St. George
 - ii. Tour of Ecumenical Patriarchate after liturgy (who shall lead tour?)

- iii. Group private audience with Your All Holiness; what is best time?
- iv. Grand Banquet in honor of Your All Holiness
 - a. Invited guests include Their Eminences, Metropolitan Chrysostom, Metropolitan Joachim, Metropolitan Meliton, Metropolitan Demetrios of Sebasteia, Metropolitan Apostolos, Prof. & Mrs. Stavrides; American Consulate Officials; Dr. Karamuratoglu
 - b. Any other guests Your All Holiness would like included
 - c. Presentation to Your All Holiness for Ecumenical Patriarchate of \$100,000
 - d. Presentation to Your All Holiness for Balukli Hospital of \$6000; is there any special project for which you would like the contribution earmarked?

E. Monday, September 4th

- i. Departure for America for most pilgrims
- ii. Some pilgrims remaining for two more days of sight seeing

II. Activities of Order of St. Andrew

- A. Completion of \$500,000 Pledge to Ecumenical Patriarchate; additional \$100,000 to be presented on September 3, 2000; (\$600,000 transmitted to Phanar since 1998 by Order of St. Andrew)
- B. Development of Travel Book for Pilgrims and individuals visiting the Ecumenical Patriarchate and holy sights in Istanbul
- C. Religious Education initiative on Ecumenical Patriarchate (CD-ROM)
- D. Archiepiscopal Enthronement Sponsorship of \$25,000
- E. Congressional and White House lobbying for religious freedom and reopening of Halki
- F. Archbishop Desmond Tutu 2000 Athenagoras Human Rights Award recipient; His Eminence Archbishop Demetrios to as His Beatitude Archbishop Anastasios to be the recipient for 2001
- G. Sponsorship of Archbishop Iakovos Resource Center (\$150,000 transmitted during tenure of Commander Emeritus Dr. Philip in the early 1990's)
- H. Concert for Peace continues to air in USA including vignette on Patriarchate
- I. Publishing new addition of Archon Album / respectfully request letter of greetings
- J. Amb. Marc Grossman made presentation to Archon Breakfast at Clergy Laity Congress in Philadelphia

III. How can we improve our activities

- A. Anything we should not do
- B. Anything we should do more

IV. The Need for a Foundation for Ecumenical Patriarchate

- V. Archdiocese of America (faction that wants independent Metropolitanates, some want autocephaly; some want to remain under the Ecumenical Patriarchate); How would the Ecumenical Patriarchate like the Archons to proceed?
- VI. Report on Pilgrimage to Holy Land
 - A. Audience with His Beatitude Diodoros; sought aid
 - B. Audience with His Beatitude Damianos of St. Catherine; mailing list of Archons?
 - C. Audience with His Beatitude Christodoulos
 - D. Met with Christian affairs advisor to mayor of Jerusalem Samuel Avyatar; review Palestinian situation
- VII. Proposal to solicit international support to reopen Halki (see attachment)
- VIII. Miscellany

With profound respect we emphasize our complete loyalty and obedience to the Ecumenical Throne.

Exhibit B

Meeting Minutes – May 11, 2018 (organizational committee meeting held at the New York office of Archon John A. Catsimatidis).

ORDER OF SAINT ANDREW THE APOSTLE
Endowment Fund Luncheon Meeting
Office of Archon John Catsimatidis, Conference Room
New York City, New York
May 11, 2018

INVOCATION

Fr. Alexander Karloutsos, Spiritual Advisor, gave the Invocation.

CALL TO ORDER

The National Commander called the initial Endowment meeting to order at 12:30 P.M. and reported on the formulation of the committee and appointment of committee members as follows:

COMMITTEE MEMBERS

In Attendance:

Fr. Alexander Karloutsos, Spiritual Advisor
Dr. Anthony J. Limberakis, National Commander

George Safiol, Committee Chairman
John Catsimatidis, Committee Vice Chair

John Halecky, Jr., National Vice Commander
Hon. B. Theodore Bozonelis, Secretary
Peter Skeadas, Treasurer
Peter Kakoyiannis, Esq.
Andrew Veniopoulos

Excused Absences:

Michael Psaros, Committee Vice Chair
Dean Poll
Thomas Constance, Esq., Legal Consultant

INTRODUCTION

The National Commander and Chairman George Safiol discussed the background for the creation of an Order of Saint Andrew the Apostle Endowment Fund noting the recent impetus results in part from Archons and others who have offered significant donations in honour of Fr. Alex and Presbytera Xanthi Karloutsos as this year's recipients of the Athenagoras Human Rights Award.

MISSION

The Committee members proposed that the mission of the Endowment is to assist the Ecumenical Patriarchate. Vice Chair John Catsimatidis noted in this regard that this mission needs to be broad rather than narrow in its scope to recognise the worldwide spiritual leadership and ministries of His All-Holiness Ecumenical Patriarch Bartholomew. The key is to be transparent in the utilization of the Endowment funds as to how, where and when distributions are made.

ORGANIZATION

The committee members proposed that the Endowment be separately incorporated as an IRC 501c3 non-profit organization controlled by a Board of Directors/Trustees comprised not only of Archons and including both male and female members. The committee suggested developing a process to select the Board members, headed by the National Commander.

Chairman George Safiol also noted that at the appropriate time, as the Endowment is funded and develops, consideration should be given to employing an Executive Director.

Father Alex requested that Thomas Constance, Esq. assist the Order in completing the legal work and bylaws necessary to create the Endowment in compliance with the law. He will contact Thomas Constance, Esq. to discuss the same with him.

THE FUND

The Committee members considered that there should be an initial fundraising for the establishment of the Endowment by "founders" in a proposed pledged amount of a \$100,000 minimum for "founder" recognition.

Peter Skeadas and Peter Kakoyiannis, Esq., supported by the Committee members, suggested that the initial “kickoff” for the fundraising be at this year’s Athenagoras Human Rights Award Banquet honouring Fr. Alex and Presbytera Xanthi, and that in addition to “founder” giving, other categories of a fundraising amounts could be included, marking each year at the Athenagoras Banquet as a continuing fundraiser for the Endowment.

The Committee members also considered the concept of a planned giving program for the Endowment for testimonial bequests and similar giving.

ADJOURNMENT

The National Commander expressed the gratitude of the Order to all serving on the Committee and to those Archons who have already indicated their commitment to pledge funds for the Endowment.

He thanked the Committee for the initial proposals and suggestions and indicated that monthly meetings will take place to establish the Endowment with a detailed fundraising plan.

The meeting was adjourned at 2:00 PM.

Exhibit C

National Council Agenda – June 8, 2018 (Foundation Committee report; Archon George E. Safiol as Chair; Archons John A. Catsimatidis and Michael G. Psaros as Vice Chairs).



ORDER OF SAINT ANDREW
ARCHONS OF THE ECUMENICAL PATRIARCHATE

Defenders of the Faith

**National Council Meeting
Greek Orthodox Archdiocese of America Conference Room
June 8, 2018**

Agenda

1. Invocation – Fr. Alexander Karloutsos, Spiritual Advisor
 - a. Perastika to Fr. Alex!
2. Epistle and Holy Gospel Lessons
 - a. Epistle Reading: St. Paul's Letter to the Ephesians 2:4-10
 - b. Gospel Reading: The Gospel According to Matthew 10:16-22
The Lord said to his disciples, "Behold, I send you out as sheep in the midst of wolves; so be wise as serpents and innocent as doves.
3. Welcome Archon Professor Aristotle Papanikolaou as newly appointed Regional Commander of Metropolis of Boston, joining Boston Metropolis Regional Commander Drake G. Behrakis; AXIOI!
4. Roll Call & Minutes – Archon Hon. B. Theodore Bozonelis Secretary
 - a. Executive Committee Meeting Decisions requiring National Council ratification
 - b. Minutes of National Council Meeting, May 11, 2018
5. Wire Transfer Special Report – Archon Nikiforos Mathews, Esq.
 - a. Insurance claims update – Archon Peter Kakoyiannis, Esq.
 - b. Receipt of \$50,000 insurance claim
6. Treasurer's Report – Archon Peter J. Skeadas
 - a. Bills for Approval
 - b. Exarch's Appeal update
 - c. Monthly treasurer's report for month

7. Insurance Needs of Order – Archon Peter Kakoyiannis, Esq.
8. Correspondence
9. Historian Review – Archon Prof. George Demacopoulos
 - a. New National Council meeting feature
 - b. Periodic Church history presentations by Historian, Archon Prof. George Demacopoulos
10. Order of St. Andrew Endowment Committee – Archon George E. Safiol, Chair, Archon John A. Catsimatidis, Vice Chair and Michael G. Psaros, Vice Chair
11. Committee Reports
 - a. 2018 Athenagoras Human Rights Award – Archon Michael G. Psaros, Chair; Archon Dean Poll and Archon Alexander Pritsos Co-Chair
 - i. With the blessings of Archbishop Demetrios, Geron of America endorsing the unanimous decision of the National Council, Fr. Alexander Karloutsos and Presbytera Xanthi Karloutsos, jointly and individually will be the *2018 Athenagoras Human Rights Award Recipients*; AXIOI!
 - ii. When: Archon Weekend, Friday, October 26 ~ Sunday, October 28, 2018
 - iii. Where: NY Hilton Midtown
 1. N. J. Bouras Award: New York Athletic Club, Friday, October 26th
 - b. Audit Committee – Archon Peter Kakoyiannis, Esq.
 - c. Bylaws Committee – Archon Christopher Stratakis, Esq.
 - i. Current proposed amendments
 - ii. Consideration for additional amendments regarding possible term limits, emeritus status, age limits, enforcement of attendance requirements
 - d. Exarch's Appeal Committee – Archon John Zavitsanos, Esq.
 - i. Status of monthly statements
 - ii. Staffing
 - e. Clergy Laity Congress – Regional Commander Archon Drake G. Behrakis & Regional Commander Archon Aristotle Papanikolaou, PhD
 - i. Archon Family Reception scheduled for Sunday, July 1, 2018
 - f. Communications/Media Committee – Archon Rocky Sisson & Archon John C. Metaxas, Esq.
 - i. Update of Strategic Communications Initiative utilizing social media
 - ii. Results of SM regarding Religious Freedom Conference
 - g. Grants Committee – Archon Judge B. Theodore Bozonelis
 - i. Requests
 - h. Legal Committee – Archon Christopher Stratakis, Esq. & Archon Peter Kakoyiannis, Vice Chair
 - i. Committee to Recommend New Archons - Archons Constantine G. Caras
 - j. New Archon Bootcamp Committee – Archon John Zavitsanos
 - i. Archon Rocky Sisson
 - k. Regional Commanders Liaison Committee – Archon Dr. Nicholas G. Loutsion, VMD

1. Religious Freedom Committee – Archon John A. Catsimatidis
 - i. Washington, DC – Archon Andrew E. Manatos
 - ii. State Legislative Initiative Final Report – Archon Stephen Georgeson
 1. Archon Bill Spell’s activities in Minnesota...getting closer to passage of Religious Freedom Resolutions in the Gofer State!
 - iii. OSCE Human Rights Meetings
 - iv. Patriarchal Property and Minority Concerns Committee – Archon Hon. B. Theodore Bozonelis

- m. Spirituality Committee – Archon Peter J. Skeadas & Archon Michael G. Psaros

12. Nicholas J. Bouras Award for Extraordinary Archon Stewardship – Archon George E. Safiol
 - a. With the blessings of Archbishop Demetrios, Geron of America, Archon George E. Safiol is nominated to receive the 2018 Nicholas J. Bouras Award for Extraordinary Archon Stewardship – AXIOS!
 - b. Who: Archon George E. Safiol
 - c. When: Friday evening, October 25, 2018
 - d. Where: New York Athletic Club (<https://www.nyac.org/>); Archon Dean Poll sponsorship
 - i. The NYAC has become a part of the cultural fabric of New York City, hosting banquets, receptions and weddings, welcoming leaders in the world of business, politics and the arts to its magnificent dining room and 187 overnight guest rooms.

13. Old & New Business
 - a. Farewell gift for Elpida Pouprou, dedicated staff member of Order for past 12 years; we all offer heartfelt gratitude and best wishes to Elpida and her beloved family!

14. Benediction – Fr. Alexander Karloutsos

Exhibit D

Certificate of Incorporation – January 17, 2019 (New York; initial corporate name: “St. Andrew Ecumenical Patriarchal Fund”).

CT-07

678

CERTIFICATE OF INCORPORATION

OF THE

ST. ANDREW ECUMENICAL PATRIARCHAL FUND INCORPORATED

under Section 402 of the Not-For-Profit Corporation Law

2019 JAN 17 PM 3:48

ice
STATE OF NEW YORK
DEPARTMENT OF STATE

FILED JAN 17 2019

TAXS _____

BY: KVA

Filer: Poles, Tublin, Stratakis & Gonzalez, LLP
46 Trinity Place, 5th Floor
New York, NY 10006

RECEIVED
2019 JAN 17 PM 12:11

DRAWN DOWN

CST ref 11360384 SD

704

STATE OF NEW YORK
DEPARTMENT OF STATE

I hereby certify that the annexed copy has been compared with the original document in the custody of the Secretary of State and that the same is a true copy of said original.



WITNESS my hand and official seal of the Department of State, at the City of Albany, on January 18, 2019.

A handwritten signature in black ink, appearing to read "Whitney Clark".

Whitney Clark
Deputy Secretary of State

**CERTIFICATE OF INCORPORATION
OF THE
ST. ANDREW ECUMENICAL PATRIARCHAL FUND INCORPORATED**

(Under Section 402 of the Not-for-Profit Corporation Law)

The undersigned being a natural person of at least eighteen years of age and acting as the incorporator of the corporation hereby being formed under the Not-for-Profit Corporation Law, certifies that:

FIRST: The name of the corporation is the **St. Andrew Ecumenical Patriarchal Fund Incorporated** (the "Corporation").

SECOND: The Corporation is a corporation as defined in subparagraph (a)(5) of Section 102 of the Not-for-Profit Corporation Law of the State of New York.

THIRD: The purpose or purposes for which the corporation is formed is any purpose for which corporations may be organized under the Not-for-Profit Corporation Law as a charitable corporation.

FOURTH: The Corporation is not formed to engage in any activity or for any purpose requiring consent or approval of any state official, department, board, agency or other body. No consent or approval is required.

FIFTH: The Corporation is a charitable corporation under Section 201 of the Not-for-Profit Corporation Law.

SIXTH: The office of the Corporation is to be located in the City and County of New York, State of New York.

SEVENTH: The name and address of each of the initial trustees of the Corporation are as follows:

Name	Address
Anthony J. Limberakis, M.D.	636 Crosswicks Road Rydal, PA 19046
George E. Safiol	64 Juniper Road Weston, MA 02493
Christ Stratakis, Esq.	Poles, Tublin, Stratakis & Gonzalez, LLP 46 Trinity Place, 5 th Floor New York, NY 10006

EIGHTH: The Secretary of State is designated as the agent of the Corporation upon whom process against the Corporation may be served. The address within the State of New York to which the Secretary of State shall mail a copy of any process accepted on behalf of the Corporation is:

St. Andrew Ecumenical Patriarchal Fund Incorporated
c/o Order of St. Andrew the Apostle
8 East 79th Street
New York, New York 10021
Attention: Office Manager

NINTH: The following language relates to the Corporation's tax exempt status and is not a statement of purposes and powers. Consequently, this language does not expand or alter the Corporation's purposes or powers set forth in paragraph **THIRD**.

Notwithstanding any other provision of this certificate of incorporation, the Corporation is organized exclusively for one or more of the purposes specified in Section 501(c)(3) of the Internal Revenue Code of 1986, as amended, or corresponding provisions of any subsequent federal tax laws (the "Code") and shall not carry on any other activities not permitted to be carried on by (a) a corporation exempt from federal income tax under section 501(c)(3) of the Code or (b) by a corporation, contributions to which are deductible under section 170(c)(2) of the Code. The Corporation is organized to support the Ecumenical Patriarchate of Constantinople and its worldwide ministries.

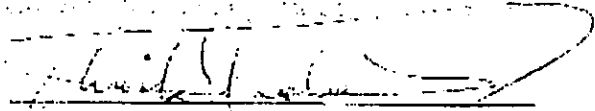
TENTH: No part of the net earnings of the Corporation shall inure to the benefit of, or be distributable to, any member, trustee, director or officer of the Corporation or any other private person or entity, except that the Corporation shall be authorized to pay reasonable compensation for services rendered and to make payments and distribution in furtherance of its purposes as set forth in this certificate of incorporation.

ELEVENTH: No substantial part of the activities of the Corporation shall be the carrying on of propaganda, or otherwise attempting to influence legislation (except as otherwise provided by Section 501(h) of the Code), and the Corporation shall not participate or intervene in (including the publication or distributions of statements) any political campaign on behalf of or in opposition to any candidate for public office.

TWELFTH: In the event of dissolution, all of the remaining assets and property of the Corporation shall, after payment of necessary expenses and satisfaction of all liabilities thereof, be distributed to the Ecumenical Patriarchate of Constantinople or any successor organization upon such approval as is required by law, including, if then required by law, upon approval of a Justice of the Supreme Court of the State of New York, or if no successor organization exists, to another organization exempt under Section 501(c)(3) of the Code to best carry forward the objects for which the Corporation was formed or to the Federal government, or state or local government for a public purpose.

THIRTEENTH: In any taxable year in which the Corporation is a private foundation as described in Section 509(a) of the Code, the Corporation shall distribute its income for said period at such time and in such manner as not to subject it to tax under Section 4942 of the Code; and the Corporation shall not (a) engage in any act of self-dealing as defined in Section 4941(d) of the Code, (b) retain any excess business holdings as defined in Section 4943(c) of the Code, (c) make any investments in such manner as to subject the Corporation to tax under Section 4944 of the Code, or (d) make any taxable expenditures as defined in Section 4945(d) of the Code.

IN WITNESS WHEREOF, this Certificate has been signed and the statements herein are affirmed as true under the penalties of perjury this 16th day of January, 2019:



Incorporator's name:
Incorporator's address:

Christ Stratakis
c/o Poles, Tublin, Stratakis & Gonzalez, LLP
46 Trinity Place, 5th Floor
New York, NY 10006

Exhibit E

New York Charitable Entity/Registration Confirmation – January 17, 2019
(supporting charitable status documentation).

Request for Registration Exemption for Charitable Organizations

New York State Department of Law (Office of the Attorney General)
Charities Bureau - Registration Section
120 Broadway
New York, NY 10271
www.charitiesnys.com

**Open to Public
Inspection**

Full Name of Organization ECUMENICAL PATRIARCH BARTHOLOMEW FOUNDATION INC.	Fed. employer ID no. (EIN) 83-3599880	NY State registration no. _____
--	---	------------------------------------

*If your organization is not claiming exemption from registration under either or both Article 7-A or the EPTL, do **not** complete Schedule E and do **not** submit a blank Schedule E. An exemption request that is not accompanied by **all** required documentation as listed below and in CHAR410, CHAR410-A or CHAR410-R Part D (Attachments) will not be considered. Do **not** request exemptions that cannot be supported by the documentation required. An exemption request has **not** been granted unless you receive a letter confirming your organization's exemption.*

Indicate whether you are claiming an exemption from the EPTL or Article 7-A or both. Complete the corresponding exemption request questions.

EPTL ⇔ Complete Part I (EPTL), skip Part II (Article 7-A).

Article 7-A ⇔ Complete Part II (Article 7-A), skip Part I (EPTL).

Both EPTL and Article 7-A ⇔ Complete Part I (EPTL) **and** Part II (Article 7-A). If you complete one but not both exemption request parts, your organization may be exempted under only one law and registered under the other law, in which case your organization would be required to file annually with the Charities Bureau.

Part I: EPTL Exemption Request

Registration exemption claim (check all that apply)	Required additional documentation (in addition to attachments listed in CHAR410, CHAR410-A or CHAR410-R Part D)
<input type="checkbox"/> 1. Organization is not charitable	None
<input type="checkbox"/> 2. Organization does not conduct activity in NY State	If your organization lists a New York address in either question 3 (Mailing address) or question 4 (Principal NYS address) of CHAR410, CHAR410-A or CHAR410-R Part A, attach a detailed explanation of why the organization has a New York address but claims not to conduct activity in NY State
<input type="checkbox"/> 3. Organization is a government agency or is controlled by a government agency	For organizations controlled by a government agency, attach a description of the relationship between your organization and the government agency and either: <ul style="list-style-type: none"> a copy of the letter from the Charities Bureau confirming the government agency exemption of that other organization, or a copy of the government agency's charter and, if applicable, IRS tax exemption determination letter
<input type="checkbox"/> 4. Organization reports annually to either the U.S. Congress or the NY State Legislature	Attach a copy of either: <ul style="list-style-type: none"> the most recent annual report filed with the U.S. Congress or the NY State Legislature, as the case may be; or a letter from such legislative body confirming that your organization reports annually to it
<input checked="" type="checkbox"/> 5. Organization is incorporated under the religious corporations law or is another type of organization with a religious purpose or is operated, supervised or controlled by or in connection with a religious organization	<ul style="list-style-type: none"> Attach a copy of listing in official denominational directory (for example, "Blue Directory"), if applicable; and For organizations operated, supervised or controlled by or in connection with another organization that is exempt from registration as religious, attach a description of the relationship between your organization and that other organization and either: <ul style="list-style-type: none"> a copy of the letter from the Charities Bureau confirming the religious exemption of that other organization, or a copy of that other organization's certificate of incorporation, by-laws, trust agreement and/or other organizational document and amendments, and, if applicable, IRS tax exemption determination letter
<input type="checkbox"/> 6. Organization is an educational institution, museum or library incorporated under the NY State Education Law or by special act	None
<input type="checkbox"/> 7. Organization is a hospital, skilled nursing facility or diagnostic/treatment center	Attach a copy of your organization's operating certificate from the NY State Department of Health
<input type="checkbox"/> 8. Organization is a membership organization (fraternal, patriotic, social, student, alumni, veterans)	None
<input type="checkbox"/> 9. Organization is a volunteer firefighters or volunteer ambulance service organization	None
<input type="checkbox"/> 10. Organization is a historical society chartered by the Board of Regents of the State University of New York	Attach a copy of the organization's charter from the Board of Regents of the State University of New York
<input type="checkbox"/> 11. Organization is a cemetery corporation subject to the provisions of Article 15 of the NY State Not-For-Profit Corporation Law	None
<input type="checkbox"/> 12. Organization is the NY State parent teachers association ("PTA") or any PTA affiliated with an educational institution subject to the jurisdiction of the NY State Education Department	Attach a copy of both: <ul style="list-style-type: none"> the educational institution's charter from the NY State Education Department; and a description of the relationship between the organization and the educational institution
<input type="checkbox"/> 13. Organization is incorporated under Article 43 of the NY State Insurance Law	None

Part II: Article 7-A Exemption Request

Registration exemption claim (check all that apply)	Required additional documentation (in addition to attachments listed in CHAR410, CHAR410-A or CHAR410-R Part D)
<input type="checkbox"/> 1. Organization does not solicit or receive any contributions from NY State (including residents, foundations, corporations, government agencies, etc.)	None
<input type="checkbox"/> 2. Organization solicits and receives gross contributions from NY State (including residents, foundations, corporations, government agencies, etc.), but organization's gross contributions are less than and will continue to be less than \$25,000 per year and organization does not and will not use the services of a professional fund raiser or fund raising counsel	None
<input type="checkbox"/> 3. Organization receives all or substantially all of its contributions from a single government agency to which it submits annual financial reports similar to those required by Article 7-A and organization's gross contributions from all other NY State sources, including other government agencies, do not and will not exceed \$25,000 per year	Attach a copy of the organization's most recent IRS Form 990, 990-EZ or 990-PF, including Schedule B, filed with the IRS
<input type="checkbox"/> 4. Organization receives an allocation from a federated fund, United Way or incorporated community appeal and organization's gross contributions from all other sources do not and will not exceed \$25,000 per year and organization does not and will not use the services of a professional fund raiser or fund raising counsel	Attach a copy of the organization's most recent IRS Form 990, 990-EZ or 990-PF, including Schedule B, filed with the IRS
<input checked="" type="checkbox"/> 5. Organization is incorporated under the religious corporations law or is another type of organization with a religious purpose or is operated, supervised or controlled by or in connection with a religious organization	<ul style="list-style-type: none"> • Attach a copy of listing in official denominational directory (for example, "Blue Directory"), if applicable; and • For organizations operated, supervised or controlled by or in connection with another organization that is exempt from registration as religious, attach a description of the relationship between your organization and that other organization and either: <ul style="list-style-type: none"> - a copy of the letter from the Charities Bureau confirming the religious exemption of that other organization, or - a copy of that other organization's certificate of incorporation, by-laws, trust agreement and/or other organizational document and amendments, and, if applicable, IRS tax exemption determination letter
<input type="checkbox"/> 6. Organization is an educational institution that confines its solicitation to its student body, alumni, faculty and trustees and their families	Attach a copy of the organization's charter from the NY State Department of Education, Board of Regents of the State University of New York or similar government agency
<input type="checkbox"/> 7. Organization is an educational institution or museum that files annual financial reports with the Board of Regents of the State University of New York as required by the NY State Education Law or with an agency having similar jurisdiction in another state	Attach a copy of either: <ul style="list-style-type: none"> • the most recent annual financial report filed with the Board of Regents of the State University of New York or other similar government agency; or • a letter from such government agency confirming that your organization reports annually to it
<input type="checkbox"/> 8. Organization is a library that files annual financial reports as required by the NY State Education Department	Attach a copy of either: <ul style="list-style-type: none"> • the most recent annual financial report filed with the NY State Education Department; or • a letter from the NY State Education Department confirming that your organization reports annually to it
<input type="checkbox"/> 9. Organization is a membership organization (fraternal, patriotic, social or alumni) that confines its solicitation of contributions to its membership	None
<input type="checkbox"/> 10. Organization is a law enforcement support organization that confines its solicitation of contributions to its membership	None
<input type="checkbox"/> 11. Organization is a historical society chartered by the Board of Regents of the State University of New York that confines its solicitation of contributions to its membership	Attach a copy of the organization's charter from the Board of Regents of the State University of New York
<input type="checkbox"/> 12. Organization is the NY State parent teachers association ("PTA") or any PTA affiliated with an educational institution subject to the jurisdiction of the NY State Education Department	Attach a copy of both: <ul style="list-style-type: none"> • the educational institution's charter from the NY State Education Department; and • a description of the relationship between the organization and the educational institution
<input type="checkbox"/> 13. Organization is a chartered local post, camp, chapter or county unit of a bona fide veterans' organization, a bona fide organization of volunteer firefighters, a volunteer ambulance service organization, or a bona fide auxiliary or affiliate of such an organization and organization's fund raising is done by its members without direct or indirect compensation	For veterans' organizations, attach a copy of the organization's charter from a bona fide veterans' organization
<input type="checkbox"/> 14. Organization is a police department, sheriff's department or other governmental law enforcement agency	None
<input type="checkbox"/> 15. Organization is a government agency or is controlled by a government agency	For organizations controlled by a government agency, attach a description of the relationship between your organization and the government agency and either: <ul style="list-style-type: none"> - a copy of the letter from the Charities Bureau confirming the government agency exemption of that other organization, or - a copy of the government agency's charter and, if applicable, IRS tax exemption determination letter

Exhibit F

IRS 501(c)(3) Determination Letter – August 26, 2020 (effective date: January 17, 2019).



Department of the Treasury
Internal Revenue Service
Tax Exempt and Government Entities
P.O. Box 2508
Cincinnati, OH 45201

ST ANDREW ECUMENICAL PATRIARCHAL FUND I
C/O OFFICE MANAGER
8 EAST 79 STREET
NEW YORK, NY 10021

Date:
08/26/2020
Employer ID number:
83-3599880
Person to contact:
Name: Paul F Cappel II
ID number: 1010762
Telephone: (877) 829-5500
Accounting period ending:
December 31
Public charity status:
170(b)(1)(A)(vi)
Form 990 / 990-EZ / 990-N required:
Yes
Effective date of exemption:
January 17, 2019
Contribution deductibility:
Yes
Addendum applies:
No
DLN:
26053563003900

Dear Applicant:

We're pleased to tell you we determined you're exempt from federal income tax under Internal Revenue Code (IRC) Section 501(c)(3). Donors can deduct contributions they make to you under IRC Section 170. You're also qualified to receive tax deductible bequests, devises, transfers or gifts under Section 2055, 2106, or 2522. This letter could help resolve questions on your exempt status. Please keep it for your records.

Organizations exempt under IRC Section 501(c)(3) are further classified as either public charities or private foundations. We determined you're a public charity under the IRC Section listed at the top of this letter.

If we indicated at the top of this letter that you're required to file Form 990/990-EZ/990-N, our records show you're required to file an annual information return (Form 990 or Form 990-EZ) or electronic notice (Form 990-N, the e-Postcard). If you don't file a required return or notice for three consecutive years, your exempt status will be automatically revoked.

If we indicated at the top of this letter that an addendum applies, the enclosed addendum is an integral part of this letter.

For important information about your responsibilities as a tax-exempt organization, go to www.irs.gov/charities. Enter "4221-PC" in the search bar to view Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, which describes your recordkeeping, reporting, and disclosure requirements.

Sincerely,

Stephen A. Martin
Director, Exempt Organizations
Rulings and Agreements

Exhibit G

EPBF Website (PDF) – “The Establishment of the Foundation”
(bartholomew.foundation/establishment/).



DONATE TO THE FOUNDATION

ABOUT

The Establishment of the Foundation

A Watershed Event in the History of the Ecumenical Patriarchate

Established by the Order of St. Andrew
Archons of the Ecumenical Patriarchate in America
on January 17, 2019

when it was incorporated by the State of New York as a charitable entity

Anthony J. Limberakis, MD
National Commander, Order of St. Andrew and
Chair, Ecumenical Patriarch Bartholomew Foundation

A Patriarchal Foundation exclusively dedicated to fortify the financial underpinnings of the Ecumenical Patriarchate, the Spiritual Center of World Orthodoxy has been the desire of many individuals for decades: Ecumenical Patriarch Bartholomew himself, Archbishop Elpidophoros even as a deacon, Fr. Alex Karlioutsos and many Archons. In fact, it has been my dream to launch this initiative ever since my appointment as National Commander in 1998 because unlike every other major faith, the Ecumenical Patriarchate has never had a reliable and consistent charitable foundation or endowment to fund its worldwide ministries. However, over the years the Order of St. Andrew prioritized addressing the existential threat of the egregious Religious Freedom deficit in Turkey asphyxiating the Mother Church and our efforts were concentrated in that threatening realm. Nevertheless, in May 2018 I established a formal committee of the National Council of the Order of St. Andrew chaired by Archon George E. Saffor and co-chaired by Archon John A. Catsimatidis and Michael G. Psaros to seek the ways and means to establish a formal Patriarchal Foundation. The original committee was comprised of the Officers of the Order (National Vice Commander John Hakecky, Jr., National Secretary Hon. B. Theodore Bozonelis and National Treasurer Peter J. Skeadas) and Archons Tom Constance, Esq, Peter Kakoyiannis, Esq, and Chris Stratakis, Esq, who all had expertise in various fields: legal, financial and business. Our spiritual guidance was offered by Fr. Alex, the Order's Spiritual Advisor who actively participated in all the committee meetings, many of which were held in the Board Room of Archon John A. Catsimatidis, the Order's Chair of the Religious Freedom Committee. These monthly committee meetings were detailed, substantive and comprehensive.

When Fr. Alex and Presbytera Xanthi were selected to receive the 2018 Athenagoras Human Rights Award, the National Council of the Order voted to earmark all donations that would be raised from that event, for the exclusive use of the Ecumenical Patriarchate. This event which raised a record \$1.4 million and it was these monies which in essence established the initial funding of the Foundation. This milestone *Athenagoras Human Rights Award Banquet* was attended by individuals from around the world, including His Eminence Metropolitan Emmanuel of France and now Geron of Chalcedon and former Vice President and now President Joe Biden. By January 28, 2019 the Foundation was formally incorporated as a charitable entity in the State of New York with our subsequent application to the IRS as a 501c3 application approved on August 26, 2020.

The subsequent election of His Eminence Elpidophoros of America on May 11, 2019 and his enthronement in New York City on June 22, 2019 assured the success of the Foundation. His Eminence Archbishop Elpidophoros is the official representative of the Ecumenical Patriarch and as such is a full voting member of the Board of Trustees.

The initial name of the Foundation was originally the *St. Andrew Ecumenical Patriarchal Fund* but was later changed by the Board of Trustees to the *Ecumenical Patriarch Bartholomew Foundation, For the Sacred See of St. Andrew*, as a lasting tribute to His All-Holiness BARTHOLOMEW, the longest serving Ecumenical Patriarch, Archbishop of Constantinople-New Rome in history. In fact, the central element of the Foundation's logo is the official ecclesiastical logo of His All-Holiness Ecumenical Patriarch Bartholomew; so in 50 or 100 years, when the Foundation has 100s of millions of dollars, the oikoumene will always be reminded of the extraordinary and historic legacy of BARTHOLOMEW, in **perpetuity**.

When the organizing committee was deliberating on the various details of the Foundation, the members all felt strongly that the Foundation's Board of Trustees must include women and two outstanding Orthodox women now serve in that capacity: Maria Alwin and Aphrodite Skeadas.

The establishment of the Ecumenical Patriarch Bartholomew Foundation by the Order of St. Andrew truly is a watershed response to a deep and longstanding need to establish a solid financial foundation for the Ecumenical Patriarchate. Indeed, the time has finally come for Orthodox Christians around the world to join together and ensure that the voice of the Apostolic Throne of Andrew never goes silent and the Spiritual Center of our Faith is able to lead Christ's Holy Church for generations to come. The Bartholomew Foundation has a global initiative to:

- Establish a reliable, substantial charitable foundation to fund the worldwide salvific ministries of the Ecumenical Patriarchate;
- Increase the Orthodox Christian presence on the global stage;
- Foster increased inter-Orthodox dialogue; and
- Expand charitable and humanitarian aid.

As of this writing, \$18 MILLION has been raised for the Foundation by 157 FOUNDERS who have each pledged \$100,000, as well as a \$1 MILLION Matching Grant from the Nicholas J. and Anna K. Bouras Foundation.

"Glory to God for all things," in the words of St. John Chrysostom, Archbishop of Constantinople (398-404).



Mission

The Ecumenical Patriarch Bartholomew Foundation For the Sacred See of Saint Andrew, has been established as an endowment by the Archons of the Ecumenical Patriarchate. Our is a global mission and initiative for everyone across the various Eparchies of the Ecumenical Patriarchate to be united as one. Together, we can ensure that the Ecumenical Patriarchate, "the Light - continues to shine in the darkness"

Partners



3 East 79th Street, New York, NY 10075
Phone: 212-774-0444

Exhibit H

Archons/AEP Publications (PDF) – Archons FAQ and EPBF mission/description materials (archons.org), including relevant Annual Report excerpt(s) documenting Archon support totals.



ECUMENICAL PATRIARCH
BARTHOLOMEW
FOUNDATION
For the Sacred See of Saint Andrew

[DONATE TO THE FOUNDATION](#)[ABOUT](#)

Our Spiritual Leader

His All-Holiness Ecumenical Patriarch Bartholomew

Elected in 1991, the tenure of Ecumenical Patriarch Bartholomew has been characterized by intra-Orthodox cooperation, intra-Christian and inter-religious dialogues. He has worked to defend religious freedom and human rights and advances initiatives that foster tolerance amongst the world's religions, including Muslims and Jews. For nearly 30 years, he has hosted, and visited numerous religious and world leaders. His efforts to promote ecological justice and the protection of the environment have been widely noted, earning him the title, "The Green Patriarch".

During his life long diaconia, he has enhanced the relationship between the Orthodox and Catholic Churches with the goal of reconciliation. The ongoing personal relationships with Popes John Paul II, Benedict XVI, and the current Pope Francis led to remarkable ecumenical accomplishments, including the return of sacred relics of Saints John Chrysostom and Gregory the Theologian, his holy predecessors on the Throne of Constantinople. In 2016, for the first time since the Great Council, under Ecumenical Patriarch Bartholomew's leadership, the Holy and Great Council of the Orthodox Church was convened in Crete. Then in 2019, the Ecumenical Patriarchate granted autocephaly to the Orthodox Christian Church in Ukraine. When his story is written a generation from now, he will be seen as one of the longest serving and progressive Patriarchs the Christian world has ever known.

However, in spite of his many notable accomplishments, the Ecumenical Patriarchate faces many challenges.

Religious freedom ought to be a right. But, for the Ecumenical Patriarchate today, it is a daily struggle. The Theological School has been closed for half a century, and Church properties are continually threatened with seizure. We know these are attempts to extinguish the light which shines from the Phanar.



Photo by J. Medala

A Globally Recognized Leader

Ecumenical Patriarch Bartholomew is internationally recognized.



President Joe Biden

Ecumenical Patriarch welcoming Joe Biden to the Phanar.



Newt Gingrich

Recipient of the Congressional Gold Medal with record number of votes.



Archons of the Ecumenical Patriarchate

Archons with His All-Holiness during pilgrimage to Constantinople.



Interfaith Leaders

Participating in the International Summit of Leaders of Change in Istanbul.



The Church of Ukraine

Granting the Tomos of Autocephaly to the Church of Ukraine.



Environmental Symposiums

Prayers during an environmental symposium, "The Arctic: Mirror of Life" in Greenland.



ECUMENICAL PATRIARCH
BARTHOLOMEW
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Mission

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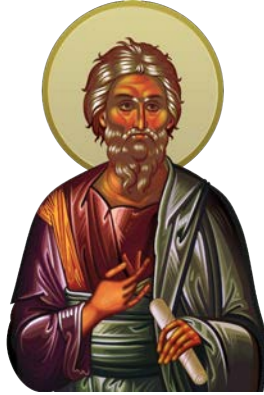
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ABOUT

Fulfilling its Apostolic Mission

Granting economic independence to the Ecumenical Patriarchate to fulfill its apostolic mission.... in perpetuity.



Saint Andrew the Apostle

Established in 38 AD by St. Andrew the Apostle, the Patriarchate of Constantinople is one of the most enduring institutions in the world and has played a prominent part in world history. Through the centuries, the Ecumenical Patriarchate has both guided the expansion, and defended the doctrine, of the Orthodox Christian Faith worldwide. The Ecumenical Patriarch is the first among equals, as articulated in the Second and Fourth Ecumenical Councils of the Undivided Christian Church, and as such is regarded as the representative and spiritual leader of Orthodox Christians around the globe. The Sacred See of Saint Andrew works tirelessly to ensure unity amongst all the Local Orthodox Churches, and actively coordinates intra-Christian and inter-religious dialogues, as well as participating in various charitable and philanthropic endeavors.

The Ecumenical Patriarch Bartholomew Foundation: For the Sacred See of Saint Andrew, has been established as an endowment by the Archbishops of the Ecumenical Patriarchate. Ours is a global mission and invitation for everyone across the various Eparchies of the Ecumenical Patriarchate to be united as one.

Together, we can ensure that the Ecumenical Patriarchate, "the Light - continues to shine in the darkness."

A global initiative that begins here in the United States as the Ecumenical Patriarch Bartholomew Foundation, a 501(c)(3) nonprofit institution recognized by the IRS as a public charity, which will have branches in all jurisdictions of the Ecumenical Patriarchate.

Let's Come Together

The time has come for Orthodox Christians around the world to come together and ensure that the voice of the Apostolic Throne of Andrew never goes silent and the Spiritual Center of our Faith is able to lead Christ's Holy Church for generations to come. In honor of His All-Holiness Ecumenical Patriarch Bartholomew's upcoming 30th Enthronement Anniversary, we are establishing the Ecumenical Patriarch Bartholomew Foundation as a global initiative to:



Grant Economic Independence

Provide financial resources to sustain, in perpetuity, the religious, educational and philanthropic institutions of the Mother Church.

Increase Orthodox Christian Presence on Global Stage

Offer support to the Ecumenical Patriarchate to encourage their presence around the globe. This will increase opportunities for dialogue with various world, environmental, and religious leaders, without being asphyxiated by financial restrictions.

Foster Increased Inter-Orthodox Dialogue

Supply economic assistance necessary for the Sacred Throne of Andrew to sponsor international conferences and meetings, amongst all jurisdictions, thereby strengthening the unity of the worldwide Orthodox Church.

Expand Charitable and Humanitarian Aid

As Ecumenical Patriarch, representing Orthodox faithful throughout the world, we offer His All-Holiness our prayers and financial support, so he may extend philanthropy on our behalf to those in need.



[Home](#) > [About](#) > History

The Archons of the Ecumenical Patriarchate was organized on the Sunday of Orthodoxy, March 10, 1966 when His Eminence Archbishop Iakovos conferred upon thirty outstanding laymen of the Church the various Offikion or Offices of the Ecumenical Patriarchate on behalf of His All Holiness Patriarch Athenagoras of blessed memory. They were honored because of their love, loyalty and support of the Ecumenical Patriarchate and their contribution to its advancement and welfare.

The Offikia for the Archons of the Ecumenical Patriarchate derive from some of the most prestigious offices of the ancient world. Originating in the Ancient Greek City-States, these civic offices were transformed when the Roman Empire embraced the Christian faith during the fourth century. As a consequence of this transition, not only were the office holders important leaders of the Christian community, the offices themselves took on specific religious responsibilities for the service and promotion of the faith in the Roman Empire. The ancient order of Archons is, in fact, the oldest and most prestigious honor that can be bestowed upon a layman in the entire Christian world.

The Archons of the Ecumenical Patriarchate meets annually and celebrates on November 30, which is the feast day of Saint Andrew the Apostle who is the Patron Saint and namesake of the Organization. The fundamental goal of the Archons is directed at an ongoing concern for religious freedom and the defense and advancement of the Ecumenical Patriarchate.

The Archons of the Ecumenical Patriarchate is a devoted group of passionate leaders, relentlessly focused on protecting religious freedom for everyone and ensuring the future of the Ecumenical Patriarchate - the historical spiritual center of the world's 300+ million Orthodox Christians.



Archons
OF THE
Ecumenical
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LINKS

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- ▶ [Ecumenical Patriarchate](#)
- ▶ [Greek Orthodox Archdiocese](#)
- ▶ [Ecumenical Patriarch Bartholomew Foundation](#)
- ▶ [4th Archon International Conference](#)

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Read the Scripture readings and learn about the commemorated Saints for Mon, February 9, 2026



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What Is An Archon?

[Home](#) > [About](#) > What is an Archon?

The Archons of the Ecumenical Patriarchate is a devoted group of passionate leaders, relentlessly focused on protecting religious freedom for everyone and ensuring the future of the Ecumenical Patriarchate - the historical spiritual center of the world's 300+ million Orthodox Christians.

An Archon is an honoree by His All Holiness Ecumenical Patriarch Bartholomew for his outstanding service to the Church, and a well-known distinguished, and well-respected leader of the Orthodox Christian community.

It is by the grace of God that the Archon has been able to offer his good works and deeds of faith. Further, it is the sworn oath of the Archon to defend and promote the Orthodox Christian faith and tradition. His special concern and interest is to serve as a bulwark to protect and promote the Sacred See of St. Andrew the Apostle and its mission. He is also concerned with the human race's inalienable rights wherever and whenever they are violated - and the well-being and general welfare of the Christian Church.

This honor extended by the Ecumenical Patriarchate carries with it grave responsibilities, deep commitments, and sincere dedication. Consequently, it is of utmost importance that this honor of obligation be bestowed upon individuals of proven Orthodox Christian character, who conform faithfully to the teachings of Christ and the doctrines, canons, worship, discipline, and encyclicals of the Church.

Those selected to serve as Archons have demonstrated a commitment greater than average toward the stewardship of time, talent and treasure for the betterment of the Church, Parish, Diocese/Metropolis, Archdiocese and the community as a whole. An Archon must truly be deserving of the proclamation: AXIOS, AXIOS, AXIOS!



Read the Scripture readings and learn about the commemorated Saints for Mon, February 9, 2026

LINKS

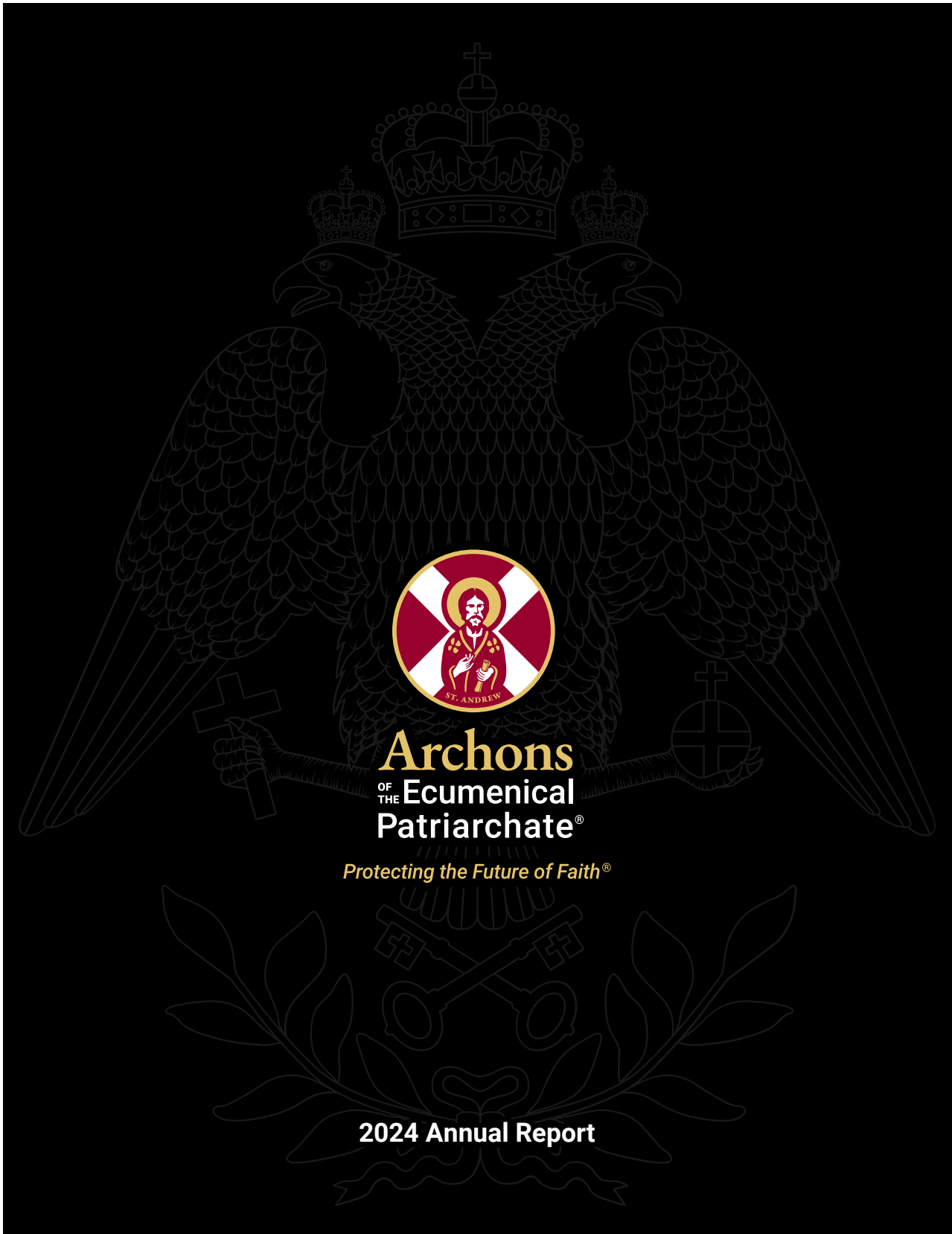
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<https://archons.org/wp-content/uploads/2025/03/2024-Annual-Report.pdf>

Exhibit I

EPBF Website (PDF) – EPBF Foundation News/Updates (bartholomew.foundation), including materials documenting the December 13, 2019 inaugural Board meeting and Patriarchal approval letter, the Inaugural FOUNDERS Dinner (Oct. 29, 2021; keynote by former U.S. Secretary of State Michael R. Pompeo; \$18M raised by 157 FOUNDERS), and the Board of Trustees Breakfast Meeting at Archon Weekend 2025 (Oct. 17, 2025; \$31M milestone).



ECUMENICAL PATRIARCH
BARTHOLOMEW
FOUNDATION
For the Sacred See of Saint Andrew

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FOUNDATION NEWS

Establishment of Ecumenical Patriarch Bartholomew Foundation

*To Aid the Financial Independence of the Ecumenical Patriarchate of
Constantinople*

On December 13, 2019, the inaugural meeting of the Ecumenical Patriarch Bartholomew Foundation (formerly, the St. Andrew Ecumenical Patriarchal Fund), a new initiative to enhance and contribute to the financial independence of the Ecumenical Patriarchate of Constantinople in its worldwide mission and ministries, was held in the Conference Room of the Greek Orthodox Archdiocese of America in New York City. This historic undertaking represents the very first such charitable entity in the world established to secure the financial underpinnings of the Spiritual Center of World Orthodoxy. The Foundation is incorporated as a Not-For-Profit Corporation in the state of New York.

As stated in its bylaws, the purposes and objectives of the Foundation are:

1. to support the Ecumenical Patriarchate and its religious, educational and philanthropic institutions;
2. to support ecumenical events and activities sponsored, approved or authorized by the Foundation's Board;
3. to assist the Ecumenical Patriarchate in upholding and defending its canonical authority in the United States and elsewhere;
4. to defend and preserve the Ecumenical Patriarchate's leadership role among the various Orthodox jurisdictions and organizations around the world; and
5. to engage in tax-exempt charitable, religious, educational, literary and scientific activities, including grants to other tax-exempt organizations, through obtaining IRC 501(c)(3) status.

At the meeting, His Eminence Archbishop Elpidophoros presented a November 21, 2019 letter from His All-Holiness approving the proposed bylaws of the Foundation, and appointing His Eminence Archbishop Elpidophoros as the Ecumenical Patriarchal Board member and representative serving at the pleasure of His All-Holiness and, under the proposed bylaws, not subject to term limits.

His Eminence also expressed the gratitude of His All-Holiness Ecumenical Patriarch Bartholomew to the Order of Saint Andrew the Apostle, Archons of the Ecumenical Patriarchate, and praised the vision of its National Commander, Dr. Anthony J. Limberakis, in leading the effort to create the Foundation. His Eminence further addressed the historical significance of establishing the Foundation.

The inaugural Board members include His Eminence Archbishop Elpidophoros of America, Patriarchal Representative and Exarch of the Ecumenical Patriarchate; Father Alexander Karloutsos, Vicar General and Director of Public Affairs of the Greek Orthodox Archdiocese of America and Spiritual Advisor to the Order of Saint Andrew, Archons of the Ecumenical Patriarchate; Dr. Anthony J. Limberakis, National Commander of the Order of Saint Andrew, Archons of the Ecumenical Patriarchate; Maria Allwin, Hon. B. Theodore Bozonellis, Thomas S. Cippas, Esq.; John A. Catsimatidis, Thomas E. Constance, Esq., Peter Kakoyannis, Esq.; Dean Poll; Michael G. Psaros; George E. Saniol; Aphrodite Skeadas; and Christopher Stratakis, Esq.

Dr. Limberakis was elected Chair of the Foundation, with George E. Saniol as Vice-Chair, Peter Kakoyannis, Esq. as Secretary, and Michael G. Psaros as Treasurer. Committee Chairs were also appointed, including Investment Chair John A. Catsimatidis; Grants Chair Maria Allwin, with Dean Poll as a Committee member; Communications Chair Aphrodite Skeadas; Audit Chair Dean Poll; and Development Chair Father Alexander Karloutsos. Advisory (Ex Officio) Chairs of the Fund Board, present and past, will comprise the Committee and choose additional advisors.

The announcement of founding members may be made during the visit of His All-Holiness to the United States in and around May 11, 2020, when His All-Holiness is in Washington D.C.

Related articles



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Informative Presentation On
Ecumenical Patriarch
Bartholomew Foundation



GENERAL

The Vital Need for the
Ecumenical Patriarch
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GENERAL

Secretary Pompeo to Deliver
Keynote Address at Ecumenical
Patriarch Bartholomew
Foundation Founding Members
Banquet



ECUMENICAL PATRIARCH
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For the Sacred See of Saint Andrew

8 East 79th Street, New York, NY 10075
Phone: 212-774-0444

Mission

The Ecumenical Patriarch Bartholomew Foundation: For the Sacred See of Saint Andrew, has been established as an endowment by the Archons of the Ecumenical Patriarchate. Ours is a global mission and invitation for everyone across the various Eparchies of the Ecumenical Patriarchate to be united as one. Together, we can ensure that the Ecumenical Patriarchate, "the Light - continues to shine in the darkness."

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FOUNDATION NEWS

Ecumenical Patriarch Bartholomew Foundation Holds Inaugural Founders Dinner



In the presence of His All-Holiness Ecumenical Patriarch Bartholomew, the Ecumenical Patriarch Bartholomew Foundation For the Sacred See of Saint Andrew held its inaugural FOUNDERS Dinner in New York City on Friday, October 29, 2021. His Excellence Archbishop Epiphanius of America officiated, assisted by His Holiness St. Porphyry, former USA Secretary of State, and the Honorable address, The Reverend Fr. Theodor Rosenthal, Archdeacon, served as Master of Ceremonies.

After the invocation by His All-Holiness Ecumenical Patriarch Bartholomew, Dr. Anthony J. Liodorakis, National Commander of the Order of Saint Andrew the Apostle, Archdeacon of the Ecumenical Patriarchate, and Chair of the Ecumenical Patriarch Bartholomew Foundation, presented the address of the Foundation.



His Holiness Ecumenical Patriarch Bartholomew presiding over the event at the Foundation.

Dr. Liodorakis stated: "A Patriarchal Foundation exclusively dedicated to further the understanding of the Ecumenical Patriarchate, the Spring Center of World Christianity, has been the dream of many individuals for decades. Ecumenical Patriarch Bartholomew showed Archbishop Epiphanius every way as did His Holiness St. Alexios and many Archbishops. The establishment of the Ecumenical Patriarch Bartholomew Foundation by the Order of St. Andrew is a remarkable response to a long and ongoing need to establish a solid financial foundation for the Ecumenical Patriarchate. Indeed, the time has finally come for Orthodox Christians around the world to join together and ensure that the vision of the Apostolic Throne of Andrew most prominent at the Spring Center for World Christianity in New York City is given precedence to us."

In addition, Dr. Liodorakis announced that to that point, "152 million has been raised for the Foundation by 157 Founders who have each pledged \$100,000, as well as a \$10 million Matching Grant from the Nicholas J. and Anne K. Boursis Foundation." He added "I glory to God for all things to the work of St. John Chrysostom, Archbishop of Constantinople."

His Holiness Ecumenical Patriarch Bartholomew presiding over the event at the Foundation.

Representative Michael E. Pompeo was sworn in as the 70th Secretary of State of the United States on April 23, 2018. He previously served as Director of the Central Intelligence Agency from January 2017 to April 2018. During his tenure as Secretary of State, on November 17, 2020 Pompeo visited the Spring Center and met with His Holiness Ecumenical Patriarch Bartholomew, the first such meeting by a visiting Republica Secretary of State. Under the auspices of Secretary Pompeo, the United States Department of State formally Ministerial for the Advancement of Religious Freedom in Washington, DC, where over 1,000 representatives from around the world attended. On September 24, 2020 Pompeo also met with His Excellence Archbishop Epiphanius of America to discuss issues involving the Ecumenical Patriarchate, Turkey, Greece, and Cyprus.

An initiative of the Order of Saint Andrew the Apostle, the vision of the Ecumenical Patriarch Bartholomew Foundation is to grow economic independence for the Ecumenical Patriarchate in North America. In special, interest is to provide Founding Members of the Ecumenical Patriarch Bartholomew Foundation have committed to ensuring the financial foundation of the Holy Mother Church the Ecumenical Patriarchate of Constantinople by pledging \$100,000 over 10 years.

The Banquet was held under the auspices of the Nicholas J. and Anne K. Boursis Foundation, which is itself a Founding Member of the Ecumenical Patriarch Bartholomew Foundation. The Nicholas J. and Anne K. Boursis Foundation is pleased to receive Founding Member donations of such magnitude of the Archdiocese of America up to one million dollars. This was made possible through the efforts of the National Secretary of the Order of Saint Andrew the Apostle St. Theodor's Church.

A link to view the Foundation Dinner proceedings will be available in the coming days on www.orthodox.org and www.bartholomewfoundation.org.

For further information about the Ecumenical Patriarch Bartholomew Foundation, see bartholomewfoundation.org. For further information about the Order of Saint Andrew the Apostle, Archdeacon of the Ecumenical Patriarchate, see orthodox.org.

View Photos of the Founders Dinner

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The Vital Need for the Ecumenical Patriarch Bartholomew Foundation
- GENERAL**
Establishment of Ecumenical Patriarch Bartholomew Foundation

Mission

The Ecumenical Patriarch Bartholomew Foundation, For the Sacred See of Saint Andrew, has been established as an instrument of the Archdeacon of the Ecumenical Patriarchate. Our primary goal is to ensure that the Ecumenical Patriarchate has the financial resources to carry out its mission. The Ecumenical Patriarchate is the center of the Orthodox Church. Together, we can ensure that the Ecumenical Patriarchate, "The Light" continues to shine in the darkness.

Partners

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Phone: 212-774-0000

www.orthodox.org | www.bartholomewfoundation.org

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ECUMENICAL PATRIARCH BARTHOLOMEW FOUNDATION For the Sacred See of Saint Andrew

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FOUNDATION NEWS

Ecumenical Patriarch Bartholomew Foundation Elects 2026 Officers

On Saturday, December 13, 2025, the Ecumenical Patriarch Bartholomew Foundation (EPBF) Board of Trustees at its yearend meeting unanimously re-elected its officers and elected Meropi Neamonitakis to the Board of Trustees.

The officers who were reelected to a one-year term effective January 1, 2026, were Anthony J. Limberakis, M.D., Chair; George E. Safiol, Vice Chair; Peter Kakoyiannis, Esq., Secretary; and Chris E. Tsamutalis, CPA, Treasurer.

In addition to the officers, the EPBF Board of Trustees include His Eminence Archbishop Elpidophoros of America, Patriarchal Representative, Rev. Fr. Alexander Karloutsos, Spiritual Advisor; Andreas D. Comodromos, CPA, Assistant Treasurer; Maria Allwin, Hon. B. Theodore Bozonelis, Frank D. Catrakes, John A. Catsimatidis, Thomas E. Constance, Esq., Carl Hollister, John S. Koudounis, Markos K. Lagos, Michael G. Psaros, Aphrodite Skeadas and Christopher Stratakis.

Mrs. Neamonitakis fills the vacancy that was created with the retirement of Archon Thomas S. Cappas, Esq., an outstanding member of the Board of Trustees who was responsible for bringing numerous FOUNDERS to the EPBF.

The Ecumenical Patriarch Bartholomew Foundation, a watershed initiative of the Archons of the Ecumenical Patriarchate, is dedicated to achieving economic independence for the Ecumenical Patriarchate, so that it may fulfill its apostolic mission in perpetuity. It is a 501c(3) not-for-profit institution (January 17, 2019) and incorporated in the State of New York as a charitable institution (January 18, 2019).

Related articles



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Informative Presentation On Ecumenical Patriarch Bartholomew Foundation



GENERAL

The Vital Need for the Ecumenical Patriarch Bartholomew Foundation



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Establishment of Ecumenical Patriarch Bartholomew Foundation



ECUMENICAL PATRIARCH BARTHOLOMEW FOUNDATION

For the Sacred See of Saint Andrew

8 East 79th Street, New York, NY 10075 Phone: 212-774-0444

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Exhibit J

New York Department of State Filing Receipt and Certificate of Amendment (filed Jan. 7, 2021) and Board of Trustees Meeting Minutes (Oct. 23, 2020) (name change decision and governance actions).



CERTIFICATE OF AMENDMENT
OF THE
CERTIFICATE OF INCORPORATION
OF

ST. ANDREW ECUMENICAL PATRIARCHAL FUND INCORPORATED

*(Name of Domestic Corporation)
(Name change only)*

Under Section 803 of the Not-for-Profit Corporation Law

FIRST: The name of the corporation is:

St. Andrew Ecumenical Patriarchal Fund Incorporated

If the name of the corporation has been changed, the name under which it was formed is:

N/A

SECOND: The certificate of incorporation was filed by the Department of State on:

January 17, 2019

THIRD: The corporation was formed under the following law: *(Choose one)*

Not-for-Profit Corporation Law

Specify Other Law: _____

FOURTH: The corporation is a corporation as defined in subparagraph (5) of paragraph (a) of Section 102 of the Not-for-Profit Corporation Law.

FIFTH: The certificate of incorporation is amended as follows:

Paragraph FIRST of the Certificate of Incorporation relating to the name of the corporation is hereby amended to read in its entirety as follows:

FIRST: The name of the corporation is:


Ecumenical Patriarch Bartholomew Foundation Inc.

SIXTH: The Secretary of State is designated as agent of the corporation upon whom process against it may be served. The address to which the Secretary of State shall forward copies of process accepted on behalf of the corporation is:
c/o Order of St. Andrew the Apostle, Office Manager

8 East 79th Street, New York, New York 10021

SEVENTH: The certificate of amendment was authorized by: *(Check the appropriate box)*

- a vote of a majority of the members at a meeting.
- the unanimous written consent of the members entitled to vote thereon.
- a vote of a majority of the entire board of directors. The corporation has no members.

X 
(Signature)

Christopher Stratakis, Director

(Print or Type Signer's Name)

Capacity of Signer *(Check appropriate box):*

- Officer
- Director
- Authorized Person

**ST. ANDREW ECUMENICAL PATRIARCHAL
FUND INCORPORATED
Board of Trustees Meeting
Virtual Meeting in standing for the Greek Orthodox Archdiocese
8 East 79th Street, New York, New York
October 23, 2020**

CALL TO ORDER:

Dr. Anthony J. Limberakis, National Commander of the Order of Saint Andrew the Apostle (the “Order”) as Chairman of St. Andrew Ecumenical Patriarchal Fund Incorporated (the “Fund”) called the Board meeting to order at 3:35 P.M.

INVOCATION/WELCOME/ROLL CALL:

Invocation and opening remarks were given by His Eminence Archbishop Elpidophoros of America, Exarch of the Ecumenical Patriarchate.

A roll call confirmed a quorum of nine (9) Board members participating in the virtual ZOOM meeting. His Eminence Archbishop Elpidophoros, Father Alexander Karloutsos, Dr. Anthony J. Limberakis, Theodore Bozonelis, Peter Kakoyiannis, Christopher Stratakis, John A. Catsimatidis, Aphrodite Skeadas, George Safiol.

Guests – George Orfanakos, Andrew Veniopoulos and John Mindala.

TREASURER’S REPORT:

The Treasurer’s Report was presented by Andrew Veniopoulos in Michael Psaros absence and reported an opening balance of \$1,000,349.21 on May 2, 2019 and ending balance on September 30, 2020, of \$1,129,798.46. The funds remain in a segregated account with the Order of Saint Andrew The Apostle and will be transferred once an account is established at Citi Bank by year end.

A discussion followed concerning obtaining a credit card machine which was deferred until after a Bank account was established.

A discussion followed to remind the Order of St. Andrew the Apostle to make its \$100,000 donation by the end of the year to the Fund.

Motion to accept the Treasurer’s Report made by Aphrodite Skeadas,
Seconded by Christopher Stratakis, Esq., passed unanimously.

PROPOSED NAME CHANGE:

Chairman Limberakis began a discussion about a potential name change of the Fund. Following a thorough discussion it was unanimously decided to change the name of the Fund from its existing name to the Ecumenical Patriarch Bartholomew Foundation (“EPBF”).

Christopher Stratakis was asked to proceed to follow-up with Amending the corporate name to address the new name of the corporation with Tom Constance.

There was discussion to develop a new logo for EPBF and give consideration to include the letter “B” as it appears at the Phanar.

FUND RAISING COMMITTEE:

Father Alex Karloutsos began his presentation and introduced consultant George Orfanakos who reviewed a proposal to engage Planned Giving Advisors LLC (“PGA”) to develop various programs. The overview was presented to the Board which included a unified gift giving presentation, including pledge cards and a strategy for a matching fund-raising program. George explained the PGA would assist in developing programs needed and improve communications and would also develop a Drip Marketing Program to contact potential donors.

The cost for these services was \$7,500 annually with additional charges for travel.

Following discussion, a motion was made by Father Alexander Karloutsos, passed unanimously authorizing the Chairman to sign the contract with PGA.

COMMUNICATIONS COMMITTEE.

Aphrodite Skeadas assisted by John Mindala presented a proposed tri-fold brochure which was reviewed by the Board. The initial focus for the brochure would be towards Archon and members of Leadership 100, and modified as needed. It will be developed in print once the name change is effective. More descriptive materials to help market the program, would follow. The Chairman thanked the Committee for its efforts and future proposals.

NEW BUSINESS.

Discussion about increasing the scope of the EPBF to include other countries with the promotional material modified to the particular country being addressed.

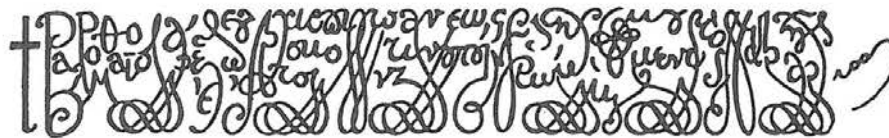
MOTION TO ADJOURN, made by Theodore Bozonelis, seconded by John A. Catsimatidis at 4:45 PM by unanimous vote.

Dated: New York, New York
October 23, 2020

/s/Peter Kakoyiannis
Peter Kakoyiannis

Exhibit K

Patriarchal Letter of His All-Holiness Ecumenical Patriarch Bartholomew to Archon National Commander, Dr. Limberakis – September 7, 2019 (transfer of 2018 banquet funds to the St. Andrew Ecumenical Patriarchal Fund Incorporated).



To the esteemed Dr. Anthony J. Limberakis, Archon Aktouarios and National Commander of the Order of St. Andrew the Apostle, our beloved in the Lord: Grace be unto you and peace from God.

It is with sentiments of paternal joy that we communicate with you in order to express our wholehearted congratulations for the wonderful 2018 Annual Grand Banquet that you and our dear sons of the Ecumenical Throne organized in October at the New York Hilton Hotel in Manhattan, and for honoring the Rev. Protopresbyter Alexander Karloutsos and his gracious wife, Presbyteria Xanthipi, at this event with your Athenagoras Human Rights Award.

With this letter, we wish to inform you of our desire to transfer the funds raised at the aforementioned banquet—which are restricted for the use of the Ecumenical Patriarchate—to the St. Andrew Ecumenical Patriarchal Fund Incorporated, a New York Not-for-Profit Corporation under the Certificate of Incorporation filed on January 17, 2019, for their direct management and supervision.

In extending to you and all the members of the Order of St. Andrew our Patriarchal blessings and prayers, we convey to you our heartfelt wishes for a spiritually prosperous new ecclesiastical year, and remain with much honor and love in the Lord.

At the Ecumenical Patriarchate, the seventh of September, 2019

Your fervent supplicant before God,

✠ Κωνσταντίνος Σαδρόπουλος

✠ BARTHOLOMEW

Archbishop of Constantinople-New Rome
and Ecumenical Patriarch



Exhibit L

Correspondence – June 29, 2021 (Holy Eparchial Synod unanimous decision of June 16, 2021 for every Metropolis to become an individual Founding Member of the EPBF).

From: Office of the Archbishop archbishopoffice@goarch.org 

Subject: OFFICE OF THE ARCHBISHOP

Date: June 29, 2021 at 9:34 PM

To: AJL@limberakis.com

Cc: Fr Andreas Vithoulkas frandreas@goarch.org, Leon W. Andris landris@andrisrealty.com, theodorebozonelis@gmail.com



Dear Dr. Limberakis,

His Eminence Archbishop Elpidophoros of America has directed me to transmit to you the attached correspondence.

I kindly ask that you please confirm receipt at your earliest convenience.

With best wishes,

Presbyter Eleftherios Constantine
Director of the Archbishop's Office

Greek Orthodox Archdiocese of America
8 East 79th Street
New York, NY 10075
Phone: +1 212-570-3505
Web: www.goarch.org



OFFICE OF THE ARCHBISHOP

GREEK ORTHODOX ARCHDIOCESE OF AMERICA

June 29, 2021

Dr. Anthony J. Limberakis, Archon National Commander &
Chair of the Ecumenical Patriarch Bartholomew Foundation
8 East 79th Street
New York, NY 10075

Dear Dr. Limberakis,

I greet you warmly in the grace and peace of our Lord and Savior Jesus Christ.

It is with particular joy that I write to inform you, together with the Foundation's Board of Trustees, of the Holy Eparchial Synod's unanimous decision for every Metropolis of our Sacred Archdiocese to become individual Founding Members of the Ecumenical Patriarch Bartholomew Foundation. As you know, this decision was made during the Synod's most recent meeting on June 16, and it reflects our collective commitment and wholehearted desire to fully support our beloved Ecumenical Patriarchate — the First Throne of Orthodoxy — in any and every way possible.

In wishing you much success in your efforts on behalf of our All-Venerable and Sacred Center, I extend to you and all the esteemed members of the Foundation my archpastoral blessings and prayers for health, strength and peace from above, and remain

With paternal love in Christ,



+ ELPIDOPHOROS
Archbishop of America

cc: The Holy Eparchial Synod
The Rev. Protopresbyter Andreas Vithoulkas, Chancellor of the Archdiocese
Mr. Leon Andris, Vice-Chair of the Metropolis Council of New Jersey
The Nicholas J. & Anna K. Bouras Foundation, Inc.

8 East 79th Street, New York, NY 10075-0192 - Telephone: (212) 570-3500 - Fax: (212) 570-3592
Web Site: www.goarch.org

Exhibit M

Patriarchal Letter of His All-Holiness Ecumenical Patriarch Bartholomew to Archon National Commander, Dr. Limberakis – November 21, 2019.

