



# MISSIONARY DISCIPLES: *Stewards of the Church*



ICSC

## 57th Annual Conference

October 6-9, 2019 | Chicago, Illinois

ICSC FORUM FOR  
CATHOLIC FOUNDATIONS

Sheraton Grand Hotel, Chicago  
October 5-6, 2019

# AGENDA

## SATURDAY, OCTOBER 5, 2019

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1:30 pm – 2:00 pm  
Pre-conference Registration

2:00 pm – 2:15 pm  
Opening Prayer/Welcome Remarks

2:15 pm – 3:10 pm  
Session I – Kerygma: Telling Our Foundation Story

Angela Moloney  
President & CEO  
Catholic Foundation of Michigan  
Bloomfield Hills, Michigan

3:10 pm – 3:30 pm  
BREAK

Sponsored by:  
CAPTRUST  
Kyle Campbell

3:30 pm – 4:25 pm  
Session II - A New Birds Eye View of Planned  
Giving: Moving from Passive to Active Strategies

MarkHenry, J.D.  
President  
East Texas Catholic Foundation  
Tyler, Texas

4:25 pm – 4:45 pm  
BREAK

Gallagher Fiduciary Advisors, LLC  
Kevin Schmid

4:45 pm - 5:45 pm  
Session III - Creative Ways to Steward Your Major  
Donors Year-Round

Margaret Keightley  
Executive Director  
Catholic Community Foundation  
Richmond, Virginia

6:15 pm  
Dinner - Bellwether Meeting House & Eatery

Sponsored by:  
Christian Brothers Investment Services (CBIS)  
Sean McCaffrey  
Fund Evaluation Group, LLC  
Matt Finke

## SUNDAY, OCTOBER 6, 2019

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7:30 am - 8:15 am  
Mass

8:15 am – 9:15 am  
Continental Breakfast  
Co-sponsored by:  
Crossmark Global Investments  
Andrew Gotfried  
Trinity Fiduciary Partners  
Samuel Saladino

9:15 am – 10:10 am  
Session IV  
How Pastors and Foundation Directors Work  
Together for Growth that's Transformational

Terri Gadzinski  
Executive Director of Stewardship & Development  
and Upper Peninsula Catholic Foundation, Inc.  
Diocese of Marquette  
Marquette, Michigan

Reverend Ben Hasse  
Director of Campus Ministry  
Michigan Technological University  
St. Albert the Great Student Parish  
Houghton, Michigan

10:10 am – 10:30 am  
BREAK

10:30 am – 12:00 pm  
Session V  
Round Table Discussions

*Attendees will have an opportunity to periodically rotate  
to a different discussion group during the roundtable  
discussions. Each table will have an assigned facilitator*



# THANK YOU TO OUR SPONSORS



## **CAPTRUST Financial Advisors**

CAPTRUST recognizes the unique challenges religious institutions face in unifying faith and finance. Our dedicated team of investment professionals is highly experienced in advising on investment assets for general funds, deposit and loan programs, foundations, endowments, lay and priest pension plans, and defined contribution retirement plans.

CAPTRUST believes investors are best served by advisors focused exclusively on their clients' best interests. This unwavering commitment to independence and transparency has enabled CAPTRUST to grow into one of the country's largest independent advisory firms.

The CAPTRUST religious services team has more than 30 years of experience working with Catholic clients and was recently ranked #3 on the 2019 *Barron's* Top 50 Institutional Consultants list.



## **Christian Brothers Investment Services (CBIS)**

CBIS is a global investment management firm that has been a trusted partner for Catholic institutions and consultants worldwide since 1981. The firm manages more than \$7.5 billion across a broad range of Catholic organizations, including dioceses, schools, hospitals, and religious institutes. Specializing in Catholic Responsible Investments<sup>SM</sup>, a distinct investment approach that combines research-driven stock screening with active ownership, CBIS helps Catholic organizations align their investments with Catholic beliefs. Using Catholic Responsible Investments<sup>SM</sup> as an overlay, CBIS actively blends complimentary institutional managers to sub-advise its diverse investment strategies. CBIS is a Registered Investment Advisor owned by the De La Salle Christian Brothers and the Center of the Institute of the Brothers of the Christian Schools. CBIS provides services out of locations in Chicago, New York, San Francisco, Rome, and Madrid.



## **Crossmark Global Investments**

Crossmark Global Investments is an innovative investment management firm. We provide a full suite of investment solutions to institutional investors, financial advisors and the clients they serve. Our focus is on the client, helping them customize their investment portfolios to ensure they are consistent with their values. We have a multi-decade legacy of specializing in values-based investing strategies for clients including faith and socially responsible screening. Founded in 1987, we are headquartered in Houston, Texas and manage approximately \$5.08B in assets.



FEG's Catholic services include investment consulting and discretionary portfolio management (OCIO) for Catholic-focused institutions. Clients can benefit from an alignment with Catholic values, trusted support, and our common desire to achieve a "double bottom line", earning both financial and ethical or social return. Services include investment policy development, portfolio design, USCCB screened, SRI, and ESG incorporated portfolios, asset allocation, manager due diligence, research and education. Established in 1988, FEG (also known as Fund Evaluation Group, LLC) is an independently owned firm and has approximately \$65 billion in total client assets under advisement. For full disclosures, visit: [www.feg.com/disclosures](http://www.feg.com/disclosures).



### Gallagher Fiduciary Advisors, LLC

Arthur J. Gallagher & Co. has been a partner to religious organizations for over 75 years. Our Investment & Fiduciary Consulting practice (Gallagher Fiduciary Advisors, LLC) can help manage the risks of your socially responsible investment program with proactive investment advice customized for your specific objectives. Our services include Investment Policy Statement development (including defined socially responsible investment criteria and monitoring procedures), strategic and tactical asset allocation in coordination with spending policy, investment manager due diligence and advice, and performance reporting. At Gallagher, we operate with objectivity – independent and free of conflicts of interest – to help you structure a fee conscious, professionally managed portfolio aligned with your values.



### Trinity Fiduciary Partners, LLC

Founded in 2005, Trinity Fiduciary Partners, LLC has become a widely respected leader in the financial services industry. Our mission is to merge finances and faith.

We are a Registered Investment Advisor with the Securities and Exchange Commission. We provide streamlined financial solutions for institutions, individuals and financial advisors. Trinity is advisor to a mutual fund, individuals and institutions with a Catholic Focus.

Investment products are powered by **IWP Capital, LLC**. We specialize in Catholic Values Investing using the “Socially Responsible Investment Guidelines” of the U.S. Conference of Catholic Bishops (USCCB) as our foundation for screening, corporate engagement and proxy voting.

Our integrated solutions are two-fold: measured performance plus a morally significant return.



The International Catholic Stewardship Council (ICSC) is a professional organization recognized internationally as a source of education, networking and information to advance the ministry of Christian stewardship as a way of life in the Roman Catholic Church, and to promote the cause of Catholic philanthropy in dioceses and parishes worldwide.

ICSC is the only organization dedicated exclusively to advancing Christian stewardship, Catholic philanthropy and resource development in North America as well as overseas. Founded in 1962, ICSC has over 1,200 members representing over 800 dioceses and archdioceses, parish communities, Catholic organizations and professional firms internationally.

## INTERNATIONAL CATHOLIC STEWARDSHIP COUNCIL

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