A Glorious History to Remember,
A Great History Yet to Be Accomplished
OUR SPONSORS

With gratitude we acknowledge the sponsors of the 2019 Resource Center for Religious National Conference.

GOLD SPONSORS

Keynote Address – Tuesday night, October 1st – Sr. Norma Pimentel, MJ
Sponsored by
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Conference Totes
JAG Capital Management | Booth 305

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BMO Global Asset Management | Booth 711

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Hospitality
Opening Reception – Tuesday, October 1st
Sponsored by
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BOSTON COMMON ASSET MANAGEMENT
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Christian Brothers Services | Booth 309 & 311

Founded in 1960, Christian Brothers Services is a nonprofit, Catholic organization that administers cooperative programs in the areas of health, retirement, property/casualty, technology, Catholic school consulting and management and financial consulting to church organizations.

Luncheon – Wednesday, October 2nd
Sponsored by
Waldorf Risk Solutions | Booth 710 & 712

WRS WALDORF RISK SOLUTIONS
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Hoffman Planning, Design & Construction, Inc.
Proud supporters of RCRI and their member communities.

&
Wipfli, LLP | Booth 201

WIPFLI
Supporter of RCRI and Women’s Religious Communities.

Refreshment Breaks – Wednesday, October 2nd – Morning
Sponsored by
Graystone Consulting AT Morgan Stanley | Booth 811

Graystone Consulting
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Wednesday, October 2nd – Afternoon
Sponsored by
Baker Tilly | Booth 303

Baker Tilly
Dedicated to preserving the integrity and mission of religious institutes and their ministries.
SILVER SPONSORS

Workshops

4. **What Do Human Rights Have to Do With Socially Responsible Investing?** | Sr. Susan Mika, OSB, David Schilling, Francis Sherman, Daniel Tretow & Sr. Andrea Westcamp, OSB

8. **Crash Course – Investment Policy Statements and Portfolio Risk** | Steven Dray & Carolyn LaRocco

20. **Frontierswomen- The Role of Catholic Women Religious in Impact Investing** | Jake Barnett, Patricia Daly, Sr. Teri Hadro, BVM & Gregory Lane

**Dana Investment Advisors** | Booth 604

2. **Internal Controls: Best Practices for Organizations of Any Size** | Laure Hovarth, Ellen Labita, Krista Pankop and Diane Simpkins

**DeMarche** | Booth 403

You set policy. We take action.

14. **Neuroscience and Well Being: How Spirituality Affects Our Health and DNA** | Anne Kertz Kernion

**REALM** | Booth 502

Where comprehensive planning meets BOLD

13. **Elder Law in a Nutshell** | Christopher Fusco, Esq.

**Wipfli** | Booth 201

Supporter of RCRI and Women’s Religious Communities.

Thank You

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NOTE: Acceptance of sponsorship does not imply endorsement by RCRI.
CONFERENCE NOTES

RCRI Office
Is located in the Client Conference Rooms 1 & 2.

Notes about Meals
- **Wednesday** – lunches are a buffet style located by Landmark A.
- **Thursday** – lunch is on your own.
- **Friday** – Hot Buffet Breakfast 7:30 am to 9 am in Marsalis Hall A.

Guidebook
The Guidebook application, successfully implemented for the 2017 & 2018 RCRI National Conferences, is available through the iPhone App Store or Google Play Store. Another option is to visit: [https://guidebook.com/g/rcri2019](https://guidebook.com/g/rcri2019) from a mobile browser and tap the “download” button to get the free app. When you have installed the Guidebook app, select “Open” and use the search feature to locate “RCRI National Conference.” Our passphrase is: rcri19. Explore the more robust and user-friendly platform today!

- Build your own personal schedule by selecting workshops that you have registered for.
- Preserve electronic copies of speaker handouts in one convenient location.
- Maintain a mobile record of meeting room assignments and important locations.
- Keep the layout of the hotel readily available.
- Receive push notifications from on-site administrators in Dallas, pending any changes to the program or content (e.g., change of rooms, etc.).
- Evaluate workshops in real-time, while the experience is still fresh.
- Engage with administrators and staff when questions arise.

The 2017 & 2018 versions of the mobile app proved to be an effective tool for evaluations and attendee engagement. The Guidebook App will be updated throughout the conference to include all available workshop handouts, finalized meeting spaces, housekeeping announcements and other pertinent information.

Exhibit Hall
Official RCRI name badges are required in the Exhibit Hall, which is located in the Marsalis Hall.

Prayer and Ritual
The beautiful prayers and liturgies that you will experience during the Conference are prepared by John Flaherty, from Loyola Marymount University, and a team of local musicians. Special gratitude to all the musicians. The Worship Booklet is printed as a separate resource.

Continuing Education Units
For those who require continuing education credits, following the conference please submit your request for RCRI verification of attendance. We will send you a letter of verification that will include a list of workshops for which you registered and attended.

For additional information, please contact Sabrina at RCRI at shidalgo@trcri.org or 301-589-8143.

Audio Recordings and Workshop Handouts
Audio Visual Management through its affiliate Network Communications will be offering Video DVD of the keynote address, Audio CD’s and MP3 Audio files of most of the workshops. These recordings can be picked up immediately following each session from the AVM booth near the registration area. Handouts will be available on the RCRI website shortly after the conclusion of the conference.

Evaluations
Completed evaluations are a valuable planning tool. **Attendees will receive via email, an on-line evaluation form.**
# Conference Schedule

## Tuesday, October 1

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Location</th>
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<tbody>
<tr>
<td>7:30 AM</td>
<td>Mass – Rev. Mark Padrez, OP</td>
<td>Cumberland KL</td>
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<tr>
<td>8:00</td>
<td>Continental Breakfast for Pre-Conference Attendees</td>
<td>Cumberland Foyer</td>
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### Pre-Conference Workshops

- **9:00 – 12:00**
  - **The Role of a Commissary: Assisting Communities on the Journey of Completion** – Sr. Paula Cooney, IHM, Sr. Jane Hibbard, SNJM, Sr. Ann Lacour, MSC
  - Location: Cumberland KL

- **9:00 – 12:00**
  - **TRENDS for Beginners** – Sr. Hertha Longo, CSA & Br. Larry Lundin, SJ
  - Location: Cumberland G

- **1:30 – 4:30**
  - **Legal Overview for Religious Institutes in 2019** – Michael Airdo
  - Location: Cumberland KL

- **1:30 – 4:30**
  - **Cor Orans – A Year Later** – Sr. Nancy Bauer, OSB & Sr. Lynn McKenzie, OSB
  - Location: Cumberland G

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<tr>
<th>Time</th>
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<tbody>
<tr>
<td>3:00</td>
<td>Attendee Check-in / Exhibits Open</td>
<td>Marsalis Hall</td>
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<tr>
<td>5:30</td>
<td>Welcome and Prayer Keynote Address – Sr. Norma Pimentel, MJ</td>
<td>Landmark BCD</td>
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<tr>
<td>6:45</td>
<td>Reception in the Exhibit Hall</td>
<td>Marsalis Hall</td>
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## Wednesday, October 2

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<thead>
<tr>
<th>Time</th>
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<tr>
<td>7:00 AM</td>
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<tr>
<td>7:30</td>
<td>Breakfast/Exhibit Hall</td>
<td>Marsalis Hall</td>
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<tr>
<td>8:30</td>
<td>Prayer</td>
<td>Landmark BCD</td>
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<tr>
<td>9:00 – 10:30</td>
<td><strong>Session 1</strong></td>
<td></td>
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<tr>
<td>1.</td>
<td><strong>Charitable Trusts Today: Current Use and Are They Current?</strong> – Br. Peter Campbell, CFX &amp; Christopher Fusco</td>
<td>Cumberland K</td>
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<tr>
<td>2.</td>
<td><strong>Internal Controls: Best Practices for Organizations of Any Size</strong> – Laurie Horvath, Ellen Labita, Krista Pankop &amp; Diane Simpkins</td>
<td>Landmark BCD</td>
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<tr>
<td>3.</td>
<td><strong>The Importance of Developing Archival Programs for Religious Communities</strong> – Joseph Markel, Mary Kenney, Malachy McCarthy &amp; Gail Peters</td>
<td>Cumberland F</td>
</tr>
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<td>4.</td>
<td><strong>What Do Human Rights Have to Do With Socially Responsible Investing?</strong> – Sr. Susan Mika, OSB, David Schilling, Francis Sherman, Daniel Tretow &amp; Sr. Andrea Westcamp, OSB</td>
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<td>5.</td>
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<td>Reunion GH</td>
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<tr>
<td>10:30</td>
<td>Break in the Exhibit Hall</td>
<td>Marsalis Hall</td>
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### Session 2

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<tr>
<th>Time</th>
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<tr>
<td>11:00 – 12:30</td>
<td>6. Canon Law at Service to Charism and Mission – Rev. John Beal</td>
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<td>7. Finding Friends and Funds for Ministry – Mary J. Foley</td>
<td>Cumberland F</td>
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<td></td>
<td>8. Crash course - Investment policy statements and portfolio risk – Steven Dray &amp; Carolyn LaRocco</td>
<td>Cumberland L</td>
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<td></td>
<td>9. Cybersecurity Awareness 101 – Tom Drez</td>
<td>Cumberland K</td>
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<td></td>
<td>10. When You Have Met a Person with Dementia You Have Met a Person with Dementia – Dayna Larson-Hurst</td>
<td>Landmark BCD</td>
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<tr>
<td>12:30 – 2:00</td>
<td>Lunch Buffet</td>
<td>Landmark A</td>
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<tr>
<td>2:00 – 3:30</td>
<td><strong>Session 3</strong></td>
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<tr>
<td></td>
<td>11. Monetizing Religious Property to Fund Financial Liabilities – William O’Connor &amp; Sr. Anna Marie Tag, RSM</td>
<td>Cumberland L</td>
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<td></td>
<td>13. Elder Law in a Nutshell – Christopher Fusco, Esq.</td>
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<td>15. Active Shooter: Shots Fired – Larry Kappel</td>
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<td></td>
<td>16. Creating Home in Someone Else’s “House”: When There is a Need to Move a Member to an Organization You Do Not Own – Sr. Marcia Frideger, SNJM &amp; Sr. Jane Hibbard, SNJM</td>
<td>Cumberland G</td>
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<tr>
<td>3:30</td>
<td>Break in the Exhibit Hall</td>
<td>Marsalis Hall</td>
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<tr>
<td>4:00 – 5:30</td>
<td><strong>Session 4</strong></td>
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<td>17. Boundaries in Ministry and Community – Sr. Mercedes McCann, RSM, Ph.D.</td>
<td>Reunion GH</td>
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<td></td>
<td>18. Hot off the Press! New Immigration Policies and Updates that International Religious Workers (and their Employers) Should Know About – Kate Adams &amp; Minyoung Ohm</td>
<td>Cumberland L</td>
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<td></td>
<td>20. Frontierswomen- The Role of Catholic Women Religious in Impact Investing – Jake Barnett, Patricia Daly, Sr. Teri Hadro, BVM &amp; Gregory Lane</td>
<td>Cumberland K</td>
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Free Evening
# THURSDAY, OCTOBER 3

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<thead>
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<tbody>
<tr>
<td>7:30</td>
<td>Breakfast in the Exhibit Hall</td>
<td>Marsalis Hall</td>
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<tr>
<td>8:30</td>
<td>Prayer</td>
<td>Landmark BCD</td>
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<tr>
<td>9:00 – 10:30</td>
<td><strong>Session 5</strong></td>
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<tr>
<td>22.</td>
<td>Ministerial Public Juridic Persons (PJP’s) – Canon and Civil Law Aspects – Mark Chopko &amp; Sr. Sharon Euart, RSM</td>
<td>Landmark BCD</td>
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<tr>
<td>23.</td>
<td>Incarnating <em>Laudato Si</em> as a Framework for Mission – Erin George, Jerry Gumbleton &amp; Eugene Shirley</td>
<td>Cumberland L</td>
</tr>
<tr>
<td>27.</td>
<td><em>Then Sings My Soul</em>: Using Music-Based Care Approaches with Older Adults – Sharon Boyle</td>
<td>Cumberland K</td>
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<tr>
<td>10:30</td>
<td>Break in the Exhibit Hall</td>
<td>Marsalis Hall</td>
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<tr>
<td>11:00 – 12:30</td>
<td><strong>Session 6</strong></td>
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<tr>
<td>29.</td>
<td>Advanced Topics in Accounting – Adam Counts, Sue Novak &amp; Kellie Ray</td>
<td>Reunion GH</td>
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<tr>
<td>30.</td>
<td>Effective Mediation for Efficient Resolutions – Michael Airdo</td>
<td>Cumberland L</td>
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<tr>
<td>31.</td>
<td>A Journey of Transformation – Pat Del Ponte, Dr. Ted Dunn &amp; Sr. Toni Harris, OP</td>
<td>Cumberland K</td>
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<tr>
<td>32.</td>
<td>Protecting Our Common Home and Lowering Energy Costs – Dan Last &amp; Daniel Misleh</td>
<td>Cumberland F</td>
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<tr>
<td>12:30 – 2:00</td>
<td>Lunch on your own</td>
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<tr>
<td>2:00 – 3:30</td>
<td><strong>Session 7</strong></td>
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<td>33.</td>
<td>Now What? Addressing the Challenges Regarding Sexual Abuse/Misconduct – Sr. Dorothy Heiderscheit, OSF</td>
<td>Cumberland L</td>
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<tr>
<td>34.</td>
<td>Understanding Liability Insurance – Just Because There is a Reference to Insurance Does not Mean You Are Covered – Stephen Waldorf</td>
<td>Cumberland K</td>
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<tr>
<td>35.</td>
<td>Finance Office Practices - How to Optimize Benefit Eligibility for Religious – Constance Neeson</td>
<td>Landmark BCD</td>
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<tr>
<td>36.</td>
<td>Religious Institutes Coming to Completion and Their Legacy – Sr. Amy Hereford, CSJ</td>
<td>Reunion GH</td>
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</tbody>
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37. **Voicing your wishes: Planning and Preparing for End-of-Life Issues** – Elizabeth Collins

3:30  **Break**  Cumberland F

3:45 – 5:15  **Session 8**  Landmark Foyer

38. **Civil and Canon Law Update** – Michael Airdo, Christopher Fusco & Sr. Sharon Euart, RSM

5:30  **Mass** – Rev. Patrick Cooney, OSB  Landmark BCD

Free Evening

**FRIDAY, OCTOBER 4**

7:00 AM  **Mass** – Rev. Patrick Cooney, OSB  Landmark BCD

7:30 – 9:00  **Hot Buffet Breakfast**  Marsalis Hall A

9:00 – 10:30  **Session 9**  Landmark BCD

WORKSHOP DESCRIPTIONS

TUESDAY, OCTOBER 1

5:30 PM  KEYNOTE ADDRESS

Moving Towards a Cultural Catholic Encounter – Sr. Norma Pimentel, MJ

The universal call to embrace our brothers and sisters who are forced to migrate from their homeland is given by Jesus and repeated by Pope Francis. It is our responsibility to ensure that our brothers and sisters are treated with compassion, love and mercy. A tender care that makes them feel welcomed and hopeful. This talk will address our universal call by sharing how the Humanitarian Respite Center has welcomed more than 150,000 individuals and is inspiring the world to do the same.

WEDNESDAY, OCTOBER 2

9:00 AM – 10:30 AM  SESSION 1


Charitable Trusts Today will review some of the history of why religious institutes settled on using this kind of trust usually for establishing and safeguarding retirement funds. This history goes back to the early 1980’s and met a need then. Does it today? Like any long-serving legal structure, periodic review is good to see if the passage of time raises questions about its viability. There is no doubt that the “safeguarding” feature of a charitable trust is more critical today than in the 1980’s. Are the actual trust documents and administrative practices up to date to reflect where religious institutes are today and continue the desired protections?

2. Internal Controls: Best Practices for Organizations of Any Size – Laurie Horvath, Ellen Labita, Krista Pankop & Diane Simpkins

Internal controls are an important means by which organizations direct, monitor and measure resources. Despite challenges such as a limited number of employees, technology changes and compliance requirements, organizations need to consider optimal control structures to ensure their continued effectiveness. Join this session to hear new ideas, best practices and creative solutions from industry-leading CPAs and a treasurer of a large religious order. Attendees will leave with the ability to strengthen their structures and address challenges.

3. The Importance of Developing Archival Programs for Religious Communities – Joseph Markel, Mary Kenney, Malachy McCarthy & Gail Peters

Religious archives have been problematic for communities because of ministry challenges, care of aging members, and physical plant concerns. This panel provides an opportunity for attendees to become aware of the significance of archives and suggest options to resolve problems in managing an archival operation. Three panelists will share the meaning of archives for religious communities, update the audience on the current status of religious archives.

Since the adoption of the United Nations Guiding Principles on Human Rights, the obligation “to respect, protect, and remedy” has been recognized by most stakeholders, including asset owners and corporations. Members of the Interfaith Center on Corporate Responsibility provide a constructive engagement network to increase leverage and capacity on business risks and opportunities. This interactive panel will share their experiences of practical stewardship and active ownership, challenges and success stories, and of working with companies.

5. Intervention as a Healthy Approach to Difficult Religious within Community – Br. Wayne Fitzpatrick, M.M. & Sr. Mary Hopkins, OP

What are the behavior patterns that are interpersonally difficult among Religious? Addictions and inappropriate behavior among Religious women and men are often misdiagnosed and untreated. Learn valuable and practical skills, techniques, principles, criteria and procedures in any intervention process. You will learn various treatments available as well as the central role of leadership and community members in the follow up and after care.

11:00 AM – 12:30 PM  
SESSION 2

6. Canon Law at Service to Charism and Mission – Rev. John Beal

This presentation will review the canonical responsibilities of superiors and councils for the temporal goods of their institutes in light of the Congregation for Institutes of Consecrated Life and Society of Apostolic Life’s 2018 Guidelines Economy at the Service of Charism and Mission. It will show that canonical norms are not distractions from but vital aids to protecting the charism and fostering the mission of religious institutes.

7. Finding Friends and Funds for Ministry – Mary J. Foley

We are so blessed with wonderful ideas for new ministries, programs, outreach and experiences that will add value to our organizations and the lives of those we serve. But how do we fund it all? What are the best methods? How do we attract new donors and then move them to higher levels of investment including bequest gifts? The workshop promises to be lively and fun.

8. Crash course – Investment Policy Statements and Portfolio Risk – Steven Dray & Carolyn LaRocco

In this in-depth session, come and learn about designing or revamping your Investment Policy Statement, including using socially responsible guidelines. We will help you become better prepared to implement investment strategies consistent with the mission, risk tolerance and liquidity needs of your community. We will also discuss how to identify and protect against both traditional financial and ESG risks in your investments.
9. **Cybersecurity Awareness 101** – Tom Drez

Do you want to see your organization in the headlines or get caught in the cross-hairs of a hacker? Cybersecurity should be top of mind for every organization. This presentation will cover the main components of an overall cybersecurity program with emphasis on providing a blueprint of a computer security awareness program that every organization can create and implement within their organization for all employees. Every organization and every employee within an organization is a target, and every organization is only as strong as its weakest link. Help your organization and employees to not be the weakest link!

10. **When You Have Met a Person with Dementia** You Have Met a Person with Dementia – Dayna Larson-Hurst

Not everyone with dementia acts the same way so how do you know what to do? As dementia advances what worked with the person before does not work now. Why is this happening and what can you do to be more effective in supporting members in your community that have various forms dementia? During this workshop we will discuss the different types of dementia and how they often present themselves. We will talk about the various stages of the number one cause of dementia, Alzheimer’s and how to support your members as their disease progresses.

**SESSION 3**

11. **Monetizing Religious Property to Fund Financial Liabilities** – William O’Connor & Sr. Anna Marie Tag, RSM

Planning and implementing Real Estate Strategies can be an overwhelming and painful endeavor for Leadership. The focus of this presentation will be to discuss the implementation of strategies in a format that is easily comprehended by all stake-holders of a property portfolio. We shall review basic planning concepts and then move on to a structured approach to creative concepts for cost avoidance and asset monetization.


Religious communities are increasingly looking for opportunities to shift capital towards positive impact. By working with experienced advisors, religious communities can align their portfolios with the Sustainable Development Goals (SDGs) and the call-to-action of *Laudato Si* to ensure an economy that serves people and planet. This session will include an interactive discussion with two religious’ treasurers, an investment consultant, and an investment manager on how the SDGs can serve as a framework for investing for positive impact.
13. **Elder Law in a Nutshell** – Christopher Fusco, Esq.

Americans who reached age 65 in 2011 had an average remaining life expectancy of 17.8 years for men and 20.4 years for women. Members of religious communities enjoy an even greater lifespan. The percentage of religious age 70 and over in the USA is 68%. This workshop introduces the legal concerns faced by aging religious: competency; health care decisions, including health care directives and living wills; and, guardianship and alternatives, including durable powers of attorney.

14. **Neuroscience and Well Being: How Spirituality Affects Our Health and DNA** – Anne Kertz Kernion

Would you like to know how several spiritual habits affect our physical and emotional health in a variety of ways? Come explore fascinating research from neuroscience and positive psychology that show how these practices slow aging in our cells, keep our brains healthy and nimble, reduce stress, and bring more health, happiness and compassion into our lives. We’ll also examine a few luminaires from our Catholic tradition to see how their teachings support these spiritual practices.

15. **Active Shooter: Shots Fired** – Larry Kappel

This presentation will assist the audience on how to develop a Survival Mindset against a threat and/or Active Shooter. Establishing: Awareness – Preparation – Rehearsal of your Action Plan and how to be mindful of your surroundings to establish “Situational Awareness.” A course of action needed to survive an active shooter. Presentation includes a 15-minute video of an active shooter scenario.

16. **Creating Home in Someone Else’s “House”: When There is a Need to Move a Member to an Organization You Do Not Own** – Sr. Marcia Frideger, SNJM & Sr. Jane Hibbard, SNJM

It can be hard enough to move a member who needs assistance to your own Convent, Monastery or Motherhouse but it is often more challenging to move them to one that is owned by someone else. How do you choose? What expectations could/should you have? How do you and your members voice your desires or concern? How do you maintain community? This workshop will offer suggestions on how to deal with these and other issues that face leadership members when they need to make the difficult decisions around moving to “someone else’s home.”

4:00 PM – 5:30 PM  
**SESSION 4**

17. **Boundaries in Ministry and Community** – Sr. Mercedes McCann, RSM, Ph.D.

We have heard this word so much but do we practice it? Boundaries help us care for others in a way that allows them to grow. Research shows that people who set boundaries for others tend to be more loving. Healthy boundaries enhance security, provide trust, offer support, create hope, foster responsibility, facilitate healing, allow for growth, and promote a balance and consistency in relationships that allow them to thrive.
18. **Hot off the Press! New Immigration Policies and Updates that International Religious Workers (and their Employers) Should Know About** – Kate Adams & Minyoung Ohm

This workshop will review the new immigration policies introduced by the Trump administration in 2018 and discuss their impact on the R-1 religious worker visa program. We will examine the purpose of these new policies, share stories about how they are being implemented, and discuss how these policies change the way we prepare petitions and applications for R-1 visas, F-1 student visas, and visitor visas. In addition, the workshop will provide strategies and tips on what the religious organizations and international religious workers can do to avoid case problems and denials in light of these policies.

19. **Crisis Response: Preparing for and Reacting to, Worst Case Scenarios** – Michael Airdo

When an emergency strikes, your organization needs to know the answer to two important questions: “What do we do now?” and “What have we done already?” Be it employee misconduct, criminal investigations, shocking allegations, or financial peril, your organization can take proactive steps to mitigate reputational and financial harm that may arise. Attendees will learn how to prepare for crisis events that cannot be controlled or predicted, and how to respond when a crisis arises.

20. **Frontierswomen- The Role of Catholic Women Religious in Impact Investing** – Jake Barnett, Patricia Daly, Sr. Teri Hadro, BVM & Gregory Lane

Catholic Women Religious and faith-based organizations have often been at the vanguard of the movement of institutions seeking to align their investments with their values. As this movement has expanded, there remains a unique role for Catholic Women Religious to play as courageous and justice oriented investors. Come hear from three Women Religious institutions: each taking innovative approaches to stewarding their investment portfolios in ways that reflect their mission and ministry.


Even though we may be following the teachings of our church, our life experience and ethnic diversity has often taught us to handle aging, death and illness in different ways. This can result in challenges within the community especially during times of stress. Creating cultural responsivity helps us to gain a greater appreciation of each other and is developed when we learn from and respond respectfully with each other. The presenters of this workshop will discuss their perception of how illness, aging and death is perceived in their country of origin in an effort to help us all gain greater understanding and support of each other.
THURSDAY, OCTOBER 3

SESSION 5

22. Ministerial Public Juridic Persons (PJP's) – Canon and Civil Law Aspects – Mark Chopko & Sr. Sharon Euart, RSM

This session will review important civil and canon law aspects of organizing and operating a Ministerial Public Juridic Person. As religious institutes rapidly consider this form of church agency as a vessel for continued service and Catholic identity, this session will explore how and why to use it, and the key canonical and civil law aspects for the institutes.

23. Incarnating Laudato Si as a Framework for Mission – Erin George, Jerry Gumbleton & Eugene Shirley

This session provides illustrations of how religious institutes are currently applying the principles of Laudato Si and integral ecology and addresses the opportunities and challenges. It will describe how integral ecology can be used as a framework for Communities to align their activities, resources (e.g. properties) and structures intentionally and systemically to focus action, promote integration of the social justice/environmental activities of the Community, and engage lay partnerships/networks. We will describe a current application by a religious institute to create a residential research park for integral ecology.

24. Thoughtfully Preserving the Legacy of Religious Communities – Nathan Pamperin, Steve Petitt & Sr. Charlotte Roost, OSF

Many religious orders face a common situation — what was a once thriving institution now has an aged and burdensome facility that sits desolate on holy land. Participants will learn about options for underutilized and unused facilities. Hear the Sisters of St. Francis of Assisi on creating a facility that meets their needs today and will live on past them by being designed to suit the needs of another future owner.


TRENDS has been an effective tool for U.S. based institutes, but are there aspects of TRENDS which can be helpful for Mexican and other foreign based groups? This workshop focuses on demographic differences between the U.S. and Latin America; the challenges in using the program’s cash flow worksheets, and the differences in government benefits in Mexico. It explores different realities of religious life in Latin America as they pertain to finances and elder care and how these realities would impact the Retirement Needs Analysis and Past Service Liability. Cost of care calculations, currency rates, inflation and investment return assumptions will also be part of the discussion. Both presenters speak Spanish.
26. **Benchmarking Fees and Documenting Your Processes for Your Defined Contribution Plan** – Jim Ceplecha & Todd Timmerman

Many non-profit and church organizations thought they were immune from fee litigation on their defined contribution plan. This myth was shattered in August of 2016 when the Schlichter law firm filed 12 lawsuits against 403(b) plans. In addition, this firm filed suit against the Evangelical Lutheran Church in America. This session will briefly discuss what a church plan is and the advantages of being a church plan. The bulk of the presentation will focus on a procedurally prudent process to document the value of your defined contribution plan from a cost and value standpoint. The key takeaways will be that the process of benchmarking fees and services is more important than simply choosing the cheapest funds and determining the value of church plan status.

27. **Then Sings My Soul: Using Music-Based Care Approaches with Older Adults** – Sharon Boyle

Cost effective supportive resources for the aging population is a growing need across many religious communities. In addition, with an increase of individuals coping with neurocognitive issues such as Alzheimer’s Disease or other dementia types, neurological conditions such as Parkinson’s, or needs centered within socio-emotional domains, multi-faceted approaches to care are essential. Music is a modality that can have tremendous benefit in these environments, but staff need to be educated and trained in appropriate uses of music for the benefit of individuals in various health-based living environments. This presentation will focus on providing strategies and ideas for implementing music-based care by staff to help decrease agitation and develop meaningful interactions with others. The presentation will also help clarify differences between music therapy and music-based care, while promoting a collaboration of both in healthcare settings. Small sensory groups, 1:1, and larger group collaborative music-based experiences will be addressed using music-based concepts involving singing, rhythm experiences, and music with movement.

11:00 AM – 12:30 PM **SESSION 6**


An institute of consecrated life is established in the Catholic Church with the prescription that it is to handle its Governance. Governance has two essential structures: electing leadership and conducting chapter. It is presumed that the individuals serving in these two government structures are competent in exercising their responsibilities since Governance of an institute is essential for fulfilling its Mission. When the membership is facing diminishment, an institute must examine honestly whether it still has the capacity to carry out one or both of these two essential governing roles. When it does not, appropriate steps need to be taken to provide for what the members themselves can no longer handle. This workshop will present, as a response to the confusion, anxiety, and urgency arising within a range of institutes due their membership declining, the current possible ways to proceed by sharing information and actual situations in process.
29. **Advanced Topics in Accounting** – Adam Counts, Sue Novak & Kellie Ray

Presentation objectives include discussions related to: Overview, Variations in Accounting and Reporting, New and Emerging Issues (for example), Not-For-Profit Financial Reporting, Leases, Revenue Recognition, Tax Reform, Other New Standards. Challenges (for example): Contributed Use of Facilities, Straight Line Leases, Below Market Leases, Identifying Restricted Revenue, Lawsuit Liabilities, Imputed Interest, Charitable Trusts, Alternative Investments, Reporting Entity, Related Parties and Consolidations, Online Banking and Other Key Controls, Tax Implications of Alternative Investments, Other.

30. **Effective Mediation for Efficient Resolutions** – Michael Airdo

Jesus advises us to “settle...quickly while on the way to court” (Matthew 5:25). Mediation offers the opportunity to heed our Lord’s guidance. Whereas litigation is adversarial, costly, lengthy, and stressful, mediation provides a collaborative and efficient means of resolving a dispute. This presentation will explore the benefits of mediation, why mediation can be preferable to traditional litigation, how to find neutral mediators to resolve disputes, and how to obtain the most favorable resolution once mediation has begun.

31. **A Journey of Transformation** – Pat Del Ponte, Dr. Ted Dunn & Sr. Toni Harris, OP

This session places strategic planning in the context of a Journey of Transformation. It presents an integrated app to visioning and planning that addresses not only the personal, communal and systemic demands for change, but means for engaging the deeper, inner and interpersonal dimensions. The type of leadership, processes and visioning structures needed to help communities address the complex issues of organizational change will be shared drawing the experience of the Sinsinawa Dominicans.

32. **Protecting Our Common Home and Lowering Energy Costs** – Dan Last & Daniel Misleh

This workshop will offer ways in which religious communities can take advantage of innovative finance models for energy efficiency and renewable energy for their buildings. Catholic Energies will demonstrate how subscription models for energy efficiency projects (thus becoming operating vs. capital expenses) and investor-owned solar projects (power purchase agreements) can reduce energy use, save money, and lower your carbon footprint. These savings can then be diverted to core mission activities.

2:00 PM – 3:30 PM

**SESSION 7**

33. **Now What? Addressing the Challenges Regarding Sexual Abuse/Misconduct** – Sr. Dorothy Heiderscheit, OSF

This workshop will address important information for leadership in addressing the survivor, the congregation, the alleged perpetrator and the general public ranging from women and men perpetrators, survivors within the Congregation, treatment choices – what one can expect, and tips for good self-care as we continue this process of healing and reconciliation. While Congregations have policies and procedures in the event of an allegation, there is an emotional ripple effect.
34. Understanding Liability Insurance – Just Because There is a Reference to Insurance Does Not Mean You are Covered – Stephen Waldorf

When was the last time you read through your insurance policy? Just because a limit of liability is being referenced, does not mean you have coverage. This workshop will focus on liability insurance - what is covered, excluded, the triggers of coverage as well as different policy forms. Attendees will improve their knowledge of liability, what to ask and where to look for when examining an insurance program. We will also address the significance of certificates of insurance.

35. Finance Office Practices - How to Optimize Benefit Eligibility for Religious – Constance Neeson

The method a Finance Office uses in caring for its religious members can have an impact on whether an individual religious is eligible for various benefit programs. This talk will address recommendations regarding sending congregational support for living expenses, use of congregational checking accounts, best practices regarding Patrimonial assets, and reporting obligations regarding members’ money held in an account owned by the institute.

36. Religious Institutes Coming to Completion and Their Legacy – Sr. Amy Hereford, CSJ

Some Religious Communities are facing critical points in their lifecycle. They are coming to the completion of their historical lifecycle and will be unable to provide canonical leadership for themselves in the coming years and decades. This workshop will explore the process of coming to completion, preparation and planning for transition of governance, and planning for the legacy of the community for completing communities and for those accompanying them.

37. Voicing Your Wishes: Planning and Preparing for End-of-Life Issues – Elizabeth Collins

Advance care planning conversations can be difficult. For most, it is not easy to talk about death and dying. In this seminar, participants will learn the steps for health care decision-making for themselves or to assist another for whom they support. Whether in wellness, during chronic illness or at end of life, individuals will learn how to effectively voice their wishes and have those wishes honored should they become unable to speak for themselves. Using the “Go Wish” card game and through role play, participants will have the opportunity to reflect on what matters most to them and become more confident to have “The Conversation.” The discussion will include reference to and opportunity to reflect on the Catholic Church’s teaching on healthcare.

3:45 PM – 5:15 PM

SESSION 8

38. Civil and Canon Law Update – Michael Airdo, Christopher Fusco & Sr. Sharon Euart, RSM

Religious institutes must be prepared to respond to the pitfalls resulting from a constantly changing civil legal environment. They must also understand how the future of religious life is impacted by ongoing developments in the application of canon law. This session will provide updates on recently arisen civil and canonical issues and trends that have implications for the future of consecrated life and the various ministries.
SESSION 9


This workshop will provide a summary of all the changes in government programs for 2019, with a look ahead to pending program changes in 2020. Discussion will include: Social Security, SSI, Medicare (A, B, C & D), Medicaid, QMB, SLMB, QI-1, the Low-Income Subsidy (LIS) for Medicare D, and State Prescription Assistance Programs (SPAP), as well as a discussion on the potential impact of legislation on benefit participation for members of religious orders. This information will assist the Benefit Eligibility Coordinator of each religious order.
SPEAKER BIOS

Kate Adams, a graduate of Cleveland-Marshall College of Law, has been working as a Staff Attorney in the Religious Immigration Services section at CLINIC since 2010. In her previous work at a law firm in Virginia, she was exposed to a variety of immigration law issues. Adams is admitted to practice law in the state of Virginia.

Michael Airdo is a founding Member of Kopon Airdo, LLC. His law practice focuses on the handling of complex civil litigation matters, including litigation involving religious institutions and other not-for-profit entities and associations. He has a broad base of experience in representing the unique legal needs of religious institutes and religiously sponsored ministries. Mr. Airdo works closely with the Resource Center for Religious Institutes and is on Praesidium’s National Advisory Council for the Y-USA. He is also a member of Leading Lawyers. He received his undergraduate degree, summa cum laude, and his law degree, with honors, from DePaul University. Kopon Airdo, LLC, currently serves as National Coordinating Counsel for the Christian Brothers Risk Pooling Trust, a coverage provider limited to serving Catholic religious orders and institutions across the United States.

Geeta Aiyer, Founder and President – Boston Common Asset Management, Boston, MA is a leader in the sustainable and responsible investment movement, pioneering its expansion into the global arena. As of September 30, 2018, over 48% of Boston Common’s clientele identified as religious institutions. This coverage spans the country, from California to Puerto Rico. Boston Common has served many of these relationships for well over 20 years.

Jake Barnett is an institutional consultant with the Chicago Practice of Graystone Consulting, where he works largely with Catholic women religious orders on implementation of values aligned investing. He is also a founding steering committee member of the Catholic Impact Investing Collaborative and a member of the Climate Change Leadership group at the Interfaith Council on Corporate Responsibility.

Sr. Nancy Bauer, OSB, JCD is a member and former prioress of the Sisters of Saint Benedict of Saint Benedict’s Monastery in St. Joseph, Minnesota. She holds a master’s degree in theology with an emphasis in monastic studies from the School of Theology at St. John’s University, Collegeville, Minnesota. She earned the licentiate and doctorate in canon law at The Catholic University of America in Washington, D.C. where she is now an assistant professor of canon law specializing in consecrated life.

Rev. John P. Beal is the Stephan Kuttner Distinguished Professor of Canon Law at the Catholic University of America. Ordained a priest of the Diocese of Erie in 1974, Fr. Beal has spent most of his ministry as a teacher. He earned a licentiate in canon law from the Catholic University of America in 1983 and a doctorate in 1985. Prior to joining the faculty of Canon Law at Catholic University in 1992, he served as Judicial Vicar of the Diocese of Erie. Fr. Beal served as chair of the Department of Canon Law from 1998-2002 and was promoted to ordinary professor in 2004. He has published numerous articles and book chapters in the field of canon law and served as co-editor of A New Commentary on the Code of Canon Law published by Paulist Press in 2000. In 2008 the Canon Law Society of America honored Fr. Beal with its prestigious Role of Law Award. In 2019 he was named the Stephan Kuttner Distinguished Professor of Canon Law.

Sharon R. Boyle is an Associate Professor of Music Therapy at Saint Mary-of-the-Woods College (SMWC) in Terra Haute Indiana and has been Coordinator of the Undergraduate Music Therapy Program there since 2002. She is in her third year of doctoral studies in Health Sciences at Indiana State University, with an interest in researching the use of music-based care to address public health issues. She completed a doctoral internship in the summer of 2018 at Providence Healthcare, working with the Sisters of Providence on providing consultation, training, and direct care in their assisted living and long-term care units. She has over 20 years of experience working in long term care, in addition to other healthcare and educational settings as a music therapist, music therapy supervisor, and music therapy educator.
Br. Peter Campbell, CFX, is Director of Ryken House (since 2013) in Louisville, KY—a Xaverian retirement community. He is also active in board and Trustee service and consulting work with religious orders on legal, financial and retirement matters. Br. Peter earned a JD in 1978 from Catholic University of America; MA in 1971 from Wesleyan University in CT; AB from Catholic University of America in 1962; and graduate courses in Finances from Notre Dame School of Business. Br. Peter served as a high school teacher and Provincial Treasurer of one Xaverian province. In 1987, he set up a legal office in Washington, DC for the LCWR and CMSM conferences of religious — a predecessor of RCRI. He served as an attorney and VP for Sponsorship Services for Catholic Health Association and was Vice President—Mission and General Counsel of Roper St Francis (a multi-hospital Catholic and community health system in Charleston, SC). From 2008-2016 he served as General Treasurer of the Xaverian Brothers and continued, trustee, board and consulting activities especially with NRRO. Br. Peter is a member of the bar in MD and DC, several federal courts including the US Supreme Court and US Tax Court.

Jim Ceplecha is the managing director of Retirement Planning Services for Christian Brothers Services. He has 35 years of experience working with Catholic organizations, with the last 27 of those years overseeing the defined benefit and defined contribution plans for Christian Brothers Services. He is a Fellow in the International Society of Certified Employee Benefit Specialists.

Mark E. Chopko, Esq., is a Partner and Chair of the Nonprofit & Religious Institutions practice group of Stradley, Ronon, Stevens & Young, LLP, in its Washington, D.C. office. He advises religious and nonprofit institutions, as well as business clients, across the United States, and from Europe and the Pacific Rim, on structural and risk management and avoidance issues and defending them in complex litigation. In addition to his legal practice, Mr. Chopko is an Adjunct Professor of Law at Georgetown University. He is a graduate of the Cornell Law School. From 1987-2007, he was General Counsel, United States Conference of Catholic Bishops, Washington, DC. Mr. Chopko is a frequent presenter and writer on legal issues affecting churches and nonprofits on a variety of topics. He has served the American Law Institute and was elected an honorary member of the Church Law Society of the Czech Republic.

Elizabeth Collins, BA, BSN, MA, is a registered nurse and serves as the Clinical Care Coordinator for the Sisters of Providence in St. Mary-of-the-Woods, IN. She has worked in multiple care settings including hospitals, assisted living and long-term care, home health and hospice. She has specialty education in Ethics, Advance Directives, End of Life Care and Dementia Care. She is actively involved with the Wabash Valley Care Coalition, providing community education on the importance of voicing one’s wishes and the use of advance care planning to ensure one’s wishes are honored. She is married to Dr. Richard Collins, has 5 children and lives in Terre Haute, IN.

Sr. Paula Cooney, IHM, is a member of the Sisters, Servants of the Immaculate Heart of Mary of Monroe, MI. She has served in leadership in her Congregation as provincial and as a member of the General Leadership Team. After receiving certification in Gerontology, she has ministered in various aspects of Eldercare serving as administrator of an Assisted Living facility for seniors, as administrator of the Retirement Community and Health Care facility for the Sisters of St. Joseph of Orange, CA, and as an Eldercare Consultant for NRRO. Presently she serves as the Canonical Commissary for the Servants of Jesus, a community of Diocesan Rite of the Archdiocese of Detroit.

Adam Counts is an Associate – Not-for-Profit Services Group, Plante & Moran, PLLC. Adam has more than 9 years of experience and has served numerous not-for-profit and religious organizations in accounting, auditing, tax and management consulting. He is a member of the firm’s not-for-profit leadership team, with responsibility for planning and coordinating its internal and external not-for-profit technical trainings.

Sr. Patricia Daly, OP is a Dominican Sister of Caldwell, NJ and has worked in Corporate Responsibility and Socially Responsible Investing for over 40 years.

Patrick Del Ponte PE, LEED® AP BD+C is Hoffman Planning, Design & Construction, Inc.’s Vice President of Planning Services. Pat has nearly 35 years of experience and has worked with more than 35 religious institutes across the country. Pat takes a very hands-on approach to building trust and confidence with clients when guiding them through a holistic approach to planning and discernment of their future. Pat has presented at past RCRI National Conferences and has been published in the RCRI Bulletin.
Steven Dray is Zevin Asset Management’s chief investment officer. He chairs the Investment Committee and co-ordinates its work. Within this group he contributes to the macroeconomic scenarios, asset allocation, and security selection decisions made on behalf of all firm clients. He also manages investment portfolios and relationships for individual and institutional clients. Before joining Zevin Asset Management in 2016, Steven was a senior portfolio manager at Alpha One Capital in Boston. He began serving those clients in 2001 while at sister companies David L. Babson and Oppenheimer Funds, where he similarly served as a portfolio manager. Prior to earning his MBA in Finance at Indiana University, Steven taught English as a Second Language in Costa Rica and worked in the engineering field analyzing fiber optic communications. He received his BS in Electrical Engineering in 1991 from Tufts University. He has served as a board member of Indiana University’s Reese Investment Fund for the past 15 years. He is an avid world traveler and is passionate about social justice and corporate governance, especially as it relates to excessive pay for those at the top.

Tom Drez is the Chief Information Officer, Chief Privacy Officer, Chief Security Officer and Managing Director of Information Technology Services for Christian Brothers Services (CBS), a Lasallian enterprise which serves Catholic institutions and organizations by administering and managing employee health benefit and retirement plans, religious health trusts and institutional risk management services. Tom joined CBS in 1987 to lead the ITS division. Information & Technology Services at CBS includes all information technology operations, software design and development, and education and proficiency. Tom holds a Bachelor of Arts degree in computer science from Lewis University in Romeoville, Illinois. He holds the designation of Certified Information Privacy Professional (CIPP) from the International Association of Privacy Professionals (IAPP), is Chairman of the Church Benefits Association’s Information Technology Group, and is a member of the Diocesan Information Systems Conference (DISC). Tom is also a member of the Lemont Lions Club, district and state level of Lions Clubs International.

Dr. Ted Dunn is a licensed clinical psychologist and co-founder of Comprehensive Consulting Services in St. Louis, Missouri. He has thirty years of experience providing consultation, training and facilitation services to religious communities and other faith-based organizations throughout the United States and internationally. He regularly writes, presents, and works with leadership teams and congregations at all levels. His current focus is on guiding communities who are discerning God’s call to new life through processes that encourage deep change and transformation.

Sr. Sharon Euart, RSM is the Executive Director of the Resource Center for Religious Institutes. She is a member of the Sisters of Mercy of the Americas. She holds master’s degrees in liberal arts and in administration and supervision from Johns Hopkins University and a doctorate in canon law from the Catholic University of America in Washington, D.C. Sister Sharon previously served as Associate General Secretary for the United States Conference of Catholic Bishops, Executive Coordinator of the Canon Law Society of America and as a visiting lecturer in the School of Canon Law at The Catholic University of America. She currently serves as a consultant to the USCCB Committee on Clergy, Consecrated Life and Vocation. She is a past president of the Canon Law Society of America and recipient of its prestigious Role of Law Award.

Br. Wayne J. Fitzpatrick, M.M. is a Maryknoll Missioner and Assistant Regional Superior for the Maryknoll Fathers and Brothers in the U.S. Region. Wayne holds an M.A. from the Maryknoll School of Theology and an M.S. from Loyola University, Baltimore in Pastoral Counseling. He holds a Certificate in Geriatric Care Management from Misericordia University, Dallas, PA. Wayne has also given workshops and retreats to clergy, religious and laity in the U.S., Canada and overseas on themes of the Spirituality of the Elder Years, Touching the Holy and Meeting God in Times of Change and Transition. Wayne is presently the Managing Director of Senior Care and Transition Services for the Maryknoll Fathers and Brothers.
Mary J. Foley brings 35+ years of experience to the not-for-profit world and offers a wealth of strategic leadership skills and insights to the educational, religious and social service arenas. Ms. Foley has worked with hundreds of not-for-profits, internally as a director of development, at the board level, and through a wide variety of consulting engagements. She has raised hundreds of millions of dollars through capital campaigns, annual fund appeals and ever expanding advancement initiatives for organizations large and small. Mary is a presenter at schools, organizations and dioceses around the country, the National Catholic Development Conference, the Council for the Advancement and Support of Education, the Association of Fundraising Professionals, and the International Catholic Stewardship Conference. In 1992, Mary established Foley Consulting, Inc. to provide fundraising, marketing, organizational development and stewardship expertise so that FCI clients can better meet the needs of those they serve. After 25 years, Foley Consulting, Inc. joined Christian Brothers Services to bring more resources and opportunities to their clients and ours. Mary serves as Managing Director of Catholic School Management and Mission Advancement at CBS.

Sr. Marcia Frideger, SNJM was on her Province Leadership Team when new arrangements were made for the senior sisters in both California and Spokane after the sale of property. Prior to being in Province Leadership, she taught management and organizational behavior courses at Holy Names University for 24 years. She also taught at Shippensburg University, in PA. She did her doctoral work in management at University of California, Irvine, a Master’s in organizational behavior at Brigham Young University, and her B.A. in English at Holy Names University. She also was involved in facilitation and planning for parish councils and religious congregations. Currently she serves as liaison with another religious congregation in a covenant relationship with the Holy Names Sisters, Candidate Director, as well as serving on Boards for SNJM ministries and in charism related projects at Holy Names University.

Christopher J. Fusco, Esq. is the Associate Director for Civil Law at The Resource Center for Religious Institutes in Silver Spring, Maryland. He is also the Associate General Counsel and Moderator of The Tribunal for the Diocese of Metuchen. He holds a master’s degree in religious studies, as well as the licentiate degree in canon law, from The Catholic University of Louvain. He received his Juris Doctor degree from The City University of New York School of Law. Mr. Fusco is a member of the Bars of New York and New Jersey, and has been admitted to practice before all federal trial and appellate courts of those states, including the US District Court for the Southern District of New York and the US Court of Appeals for the Second Circuit, as well as the US Court of International Trade, the US Tax Court, and the US Supreme Court.

Erin George is a Principal in the religious institutes services group of Plante Moran REIA. She has assisted religious institutes, not-for-profit organizations and senior living providers in a variety of ways including futures planning; planning for promoting and addressing member well-being (financial and care delivery) including related physical environments; and recreating the organizational structures to support the outcomes of a planning process. These efforts include an understanding of institute demographic implications; assessing human, financial, and property resources; ministry sustainability, evaluation, and planning such as for schools and retreat centers; and integrating the various elements of properties, investments, ministries, and services to elder members into a cohesive plan for the future. These processes have recognized the need to consider the activities and resources of the organization holistically and to plan from the context of the whole in order to create opportunities to sustain the mission and charism into the future. Erin has developed a more recent focus on integral ecology and *Laudato Si* and its potential opportunity for religious institutes.
Fr. Juan Gonzalez, MSpS is a Missionary of the Holy Spirit. Born and raised in Guadalajara, Mexico, he attended The Salesian School of Theology. He also holds a degree in Psychotherapy. In 2003, he was appointed Pastor at St. Matthew Church in Western Oregon, and local superior of the Missionary of the Holy Spirit Community. Fr. Juan successfully participated in the Goizueta Business School Management Certificate program at Emory University in Atlanta. He was appointed to the Oregon Catholic Press Board of Directors in 2007. Fr. Juan has been in leadership as Provincial Councilor and since 2010 has served as Treasurer for the US Province of his Congregation. He was instrumental in starting the Development Office for his community. In the last three years, he has offered consulting services to Spanish-Speaking religious communities of men and women in the US, on financial matters. He also serves as a consultant for the National Religious Retirement Office.

Jerry Gumbleton is a Principal at Plante Moran REIA. Jerry was instrumental in establishing the religious services group at the firm over 25 years ago. He has assisted numerous religious institutes nationally and internationally, as well as health care, senior living, and not-for-profit organizations on a wide variety of issues. He has led major efforts in analyzing resources, systems, and structures in the context of institute reconfigurations. Jerry has worked extensively with institute leadership teams in identifying long-term direction and priorities. That process typically focuses on defining organizational vision, mission and charism; identifying goals and priorities; determining how property, investments, and other resources can be used to support mission and community life; and developing detailed implementation plans. More recently, in conjunction with the firm’s real estate advisors, he has been assisting institutes identify alternative uses for properties including those that support direction statements for care of earth and Laudsato Si.

Sr. Toni Harris, OP, has been a Dominican Sister of Sinsinawa for 50 years. She is currently serving as Prioress of the Sinsinawa Dominican Congregation. She has served a total of 16 years in various elected leadership roles in the congregation. Toni has had a long commitment to justice issues, having worked in Native American ministry and in national and international justice and peace promotion roles for her congregation and the wider Dominican Family. She is an artist and educator.

Sr. Dorothy Heiderscheit, OSF, MSW, ACSW, RSW; is a member of the Sisters of St. Francis, Dubuque Iowa and is Outreach Consultant Specialist and the Past Chief Executive Officer for Southdown Institute, Holland Landing Ontario, Canada. Sr. Dorothy holds her master's in clinical social work from Tulane University, New Orleans, LA and a bachelor's of science in Nursing from Marycrest College in Davenport, IA. She is a member of the Academy of Certified Social Workers (ACSW) in the USA, licensed as a Registered Social Worker (RSW) in Ontario, Canada. Previous ministry experiences include eight years as Congregational President with the Dubuque Franciscans; Director of Family Ministry with Parish based Counseling Services for Catholic Charities and Diocese of Jackson, MS; Therapist with Religious and Clergy in the Tristate area of Dubuque, IA; and an international speaker on numerous Mental Health topics with Religious Congregations.

Sr. Amy Hereford, CSJ is a Sister of St. Joseph. She has been in religious life for over 30 years and has served in a variety of ministries, in education, in administration, in communication, in vocation/formation and in leadership. Sr. Amy an attorney and canonist, a well-known consultant, and a speaker and writer on theology of religious life and its future, and on issues of civil and canon law related to religious life.

Sr. Jane Hibbard, SNJM is a member of the Holy Names of Jesus and Mary. She ministered for many years in education, first as a teacher in the primary grades then as a principal for 21 years. Jane served her community in leadership. During that time she participated in a major reorganization of governance structures along with the integration of health care services. At present she serves as Commissary and Pastoral Administrator for the Benedictine Sisters of Mt. Angel Oregon.
Sr. Mary C. Hopkins, OP is a Dominican Sister of the Congregation of Sinsinawa, WI. She is a Consultant on Third Age and Retirement needs for Congregations of female and male religious as well as dioceses. In addition to this she also preaches retreats for religious and has a spiritual direction and counseling practice. Mary is a member of the Spirituality and Aging Board of the American Society on Aging. Preparation for these various ministries includes a master's degree in Counseling/ Spirituality from Loyola University, Baltimore MD, and a BA in Education from Edgewood College, Madison WI. Mary is also a Certified Grief Specialist and certified in Advanced Bereavement Counseling Skills.

Laurie Horvath, CPA has more than 20 years of public accounting experience, including 12 years with an international firm with five in a national office role. As Baker Tilly’s healthcare and not-for-profit practice leader in Detroit, she specializes in providing auditing, accounting and consulting services to not-for-profit and healthcare clients, including financial statement audits and single audits under OMB Uniform Guidance.

Sr. Lynn Jarrell, OSU, MA, JCD is a member of the Ursuline Sisters of Louisville, Kentucky. She has a Doctorate in Canon Law from the Catholic University of America and a master’s in communication from Western Kentucky University. Lynn has served as Vice-President and President of her Congregation. From 2005-2008, Lynn was the Associate Director for Canonical Affairs at the Legal Resource Center for Religious (the predecessor of RCRI). She has taught in various Schools of Theology, seminaries and other programs as a full-time faculty member, adjunct professor or lecturer. She has contributed to canonical publications, either as author or editor. Lynn served in the Tribunals for the Diocese of Evansville, Indiana and the Archdiocese of San Francisco, California. Lynn has served on the Board of Governors of the Canon Law Society of America as Consultor, Secretary, Vice President, President and Past President. She has also served on several of its committees and as an editor of one of its publications. Since 1984 Lynn has worked with the leadership of religious institutes and their national organizations in the United States and beyond, most recently in Canada, Zambia and Austria. After finishing her term as President of her congregation she resumed this work full time, serving as consultant, facilitator and presenter on a range of canonical and religious topics including presenting retreats on religious life, facilitation of leadership groups and chapters, and accompanying institute through the planning and implementation process of coming to completion.

Larry Kappel - Loss Control Assistant Manager – Catholic Mutual Group. As the Loss Control Assistant Manager, Mr. Kappel’s duties include providing risk management services by promoting safety awareness through educational seminars, writing of safety articles, analyzing loss history and trends to identify exposures to our churches, schools and religious organizations. For approximately 11 years, before Catholic Mutual, Mr. Kappel conducted hundreds of structure and vehicle fires as an arson investigator for other insurance companies. These services provided pertinent information as to the cause and origin of the fire to identify the potential for subrogation or legal action. Prior to this, Mr. Kappel had worked in law enforcement for approximately 13 years as a deputy sheriff conducting criminal investigations which included homicides, drug trafficking, and a variety of other criminal cases. Mr. Kappel obtained his Bachelor of Science degree in Chemistry with a minor in Criminal Law.

Mary Kenney serves as Marianist Province Archivist for the National Archives of the Marianist Province of the United States, created in 2014 in San Antonio, Texas as the central repository for the Society of Mary. She has two degrees in Classical Studies and a second Master of Science in Information from the University of Michigan, Ann Arbor.

Anne Kertz Kernion (BS in Environmental Engineering, Penn State; MA in Theology, Duquesne U.; Certificate in the Science of Happiness, UC Berkeley; current graduate student in Positive Psychology, U. of Missouri) is the owner/artist of Cards by Anne, an inspirational greeting card company founded in 1986. For fourteen years, Anne also taught courses in Chemistry, Environmental Science, World Religions and Ethics at two colleges in Pittsburgh. Currently, Anne is a frequent lecturer and retreat leader, presenting topics combining neuroscience, positive psychology, and spirituality. She also teaches a weekly yoga class. Anne and her husband Jack have 3 grown children and 5 grandchildren. Her book, “A Year of Spiritual Companionship” was published by Skylight Paths in 2016.
Ellen Labita, CPA is a partner in Baker Tilly’s New York regional offices, serving the not-for-profit, healthcare and higher education industries. She works with religious organizations and their sponsored ministries, providing audit and consulting services. Ellen is a professional practice leader for the firm’s not-for-profit industries and a frequent speaker at industry conferences.

Sr. Ann Lacour, MSC, is a member of the Marianites of Holy Cross, an international congregation. She has served in the ministry of leadership in her congregation since 2007 and has held the role of Canonical Leader since 2012. She will be completing her second term in 2022. She has served in a variety of ministries including Superintendent of Schools for the Diocese of Alexandria, LA and as Director of Development for her Congregation as well as for Catholic Charities of New Orleans. Ann was appointed the Pontifical Commissary of the Sisters of the Most Holy Sacrament in 2015.

Gregory C. Lane is CFO of the Missionaries of the Sacred Heart of Jesus, a worldwide, mission-driven and faith-based congregation of Catholic women and other partners in mission. The Institute was founded in 1880 by a passionate and bold woman – Saint Frances Xavier Cabrini – whose one desire was to communicate, demonstrate, and make known the love and mercy of God through tangible acts of love, mercy and justice.

Carolyn LaRocco Lakeview Capital Partners, Atlanta, GA. Carolyn has over 29 years of experience in the investment industry. Lakeview Capital manages approximately $2.6 billion in assets for a range of clientele. Lakeview’s culture is guided by a set of unwavering values to ensure intentionality and reliability: Transparency, Integrity, Advocacy, Innovation and Service.

Dayna Larson-Hurst has worked in Catholic health care for the past 20 years. As a leader and consultant, she has a passion for devising innovative ways to help congregations develop and implement strategic-change initiatives that lead to the creation of life-giving communities. Much of her work now is focused on both well-being as we age and working with congregations to implement person-directed care particularly for those with dementia. She is currently an adjunct staff member with the NRRO as well as a consultant for Catholic religious congregations throughout the United States. Dayna is a registered nurse with a BA in Business and a master’s degree in Organization Development.

Dan Last has over a decade of experience working on energy projects and building programs to reduce energy waste in organizations. Prior to leading Catholic Energies, Dan worked in consulting and education both in administration and as a teacher. He received an MBA from the University of Colorado; and a BA, BS and MEd from Boston College. Dan lives in Virginia with his wife, Shannon and his two sons, Sammy and Charlie.

Sr. Hertha Longo, CSA serves as General Treasurer of the Congregation of Sisters of St. Agnes, Fond du Lac, WI. She graduated from Marian University with a BSN in nursing; Fordham University with an MBA in Finance; and holds a Masters’ and a Ph.D. in Economics from the University of Notre Dame. Hertha is an NRRO eldercare consultant and a TRENDS consultant and works with a number of religious institutes in the areas of eldercare and long-range planning. She chaired the task force that developed the TRENDS forecasting model. Hertha is a former president of RCRI’s Board of Directors.

Br. Lawrence Lundin, SJ, Joined the RCRI office in 2013, and is the Associate Director for Administration and Finance. After joining the Jesuits in 1966, he received a degree in accounting from the University of Louisiana at Lafayette, and a MBA from Loyola University New Orleans. He worked in Jesuit community administration for many years including five years at the Jesuit Conference (Office) in Washington. He completed 22 years as New Orleans Province treasurer in June 2012. He has worked with over 15 religious institutes on TRENDS and/or financial planning. This includes active and contemplative communities, men’s and women’s institutes.

Br. Joe Markel, SM is currently the Assistant for Temporalities/Treasurer of the Marianist Province of the United States headquartered in St Louis MO. He is in his second term on the leadership team of the Marianists. He has an undergraduate degree from the University of Dayton and a master’s degree from the University of Notre Dame.
**Sr. Mercedes McCann, RSM, Ph.D.,** serves as a Psychotherapist for the Saint John Vianney Center and Catholic Clinical Consultants providing multi-dimensional psychotherapy. Before coming to SJVC, Sister Mercedes ministered in several state and county institutions for the mentally ill. She has also served as a Formation Minister for the Sisters of Mercy, Assistant Superintendent for Special Education for the Archdiocese of Philadelphia as well as numerous other positions within the field of special education. She has extensive experience facilitating small and large groups for religious communities including Chapters and Assemblies as well as speaking to groups of religious in the United States, Latin America and the Pacific Rim on various topics concerning religious life such as boundaries in religious life and priesthood, change and transition, emotional development, and the spirituality of aging. Her interest is the intersection of spirituality, ministry, community and good mental health in religious life. Sr. Mercedes is a member of the Sisters of Mercy of the Americas, Mid-Atlantic community. She holds a Ph.D. in Clinical Psychology from Seton Hall University and an M.A. in Psychology from Marywood University. She further completed Religious Studies with a concentration in Sacred Scripture from St. Charles Seminary.

**Malachy McCarthy** is the Province Archivist at the Claretian Missionaries Archives USA-Canada in Chicago. Besides serving as the archivist, he has been educating religious archivists for the past forty years. He is responsible for initiating the July 2018 Boston College conference, Envisioning the Future of Catholic Religious Archives, and serves currently as the co-chair of the committee writing a working paper on developing a strategy to manage these valuable resources.

**Sr. Lynn McKenzie, OSB** is a member of the Benedictine Sisters of Sacred Heart Monastery, Cullman Alabama since 1981. She holds a J.D. from the University of Alabama, School of Law and a J.C.L. from the Catholic University of America, School of Canon Law. Currently she serves as President of the Benedictine Sisters of the Federation of St. Scholastica, a monastic congregation, and as Moderator of Communion Internationalis Benedictinorum, the international association of Benedictine women around the world. Sr. Lynn previously served as defender of the bond for the Diocese of Birmingham and canonical consultant and advocate for superiors and members of religious communities. She was a partner in the law firm of Knight, Griffith, McKenzie, Knight & Mc Leroy from 1986-2012. She served as a member, Consecrated Life Committee of the Canon Law Society of America; Board of Governors, Canon Law Society of America; Alabama Access to Justice Commission, appointed by Alabama Chief Justice; and Board of Directors and Executive Committee, Alabama Association for Justice. She also served as President, Board of Directors, Resource Center for Religious Institutes. Sr. Lynn currently serves as Chair, Juridic Committee of the Federation of St. Scholastica and Author, Canon Law Column of American Monastic Newsletter.

**Sr. Susan Mika, OSB** is the director of the Benedictine Coalition for Responsible Investment, based in San Antonio. For several decades, she has been engaging corporations in discussions on human rights, working conditions in factories and environmental concerns.

**Daniel Misleh** is the founding executive director of Catholic Climate Covenant. Since 2006, the Covenant has developed both practical and inspirational ways to reduce the human footprint on God’s creation. Before founding the Covenant, Dan had spent 11 years in the department of Justice, Peace and Human Development at the U.S. Conference of Catholic Bishops, and three years in the Archdiocese of Cincinnati’s social action office. After graduating from Xavier University in Cincinnati, Dan joined the Jesuit Volunteer Corps, where he met his wife Susie (also a volunteer). He received a master’s degree from the Franciscan School of Theology in Berkeley, CA in 1989. Dan and Susie have three children: Benjamin, Anna, and Zachary.

**Constance Neeson** - Dir. of Benefit Eligibility Management for Religious BMT - A Division of Christian Brothers Services. Constance is a Licensed Social Worker in the state of Indiana. Constance and her team of Benefit Eligibility Consultants specialize in implementing efficient benefit eligibility management programs for over 70 religious institutes. Over the past 13 years, her team has assisted various religious institutes in achieving a total estimated financial impact of over $100 million, in increased income and in health care savings, for their congregations, through use of the various available benefit programs. The team also assists congregations with accessing enrollments into various insurance programs, and with medical billing processing. Constance has been a featured speaker at previous conferences of the Resource Center for Religious Institute (RCRI), RCRI’s predecessor National Association of Treasurers of Religious Institutes.
Sr. Marie O’Brien, SSJ  Treasurer of the Sisters of St. Joseph of Philadelphia. She has served as Treasurer for 10 years. Her prior experiences included Teaching for 10 years as well as working as a Project Manager and Account Manager for an IT company for 24 years.

William J. O’Connor  is the founder and President of Parish Property Management which manages hundreds of religious and education properties. Prior to establishing PPM, O’Connor spent twenty years working at the Building Commission of the Archdiocese of New York, first as a Field Engineer and the last ten years as Director. He is a current member of the Committee of Catholic Facilities Management (CCFM) and has served on its Board of Directors. In addition, O’Connor is an active member of the International Facility Managers Association (IFMA) and the American Society of Civil Engineers (ASCE). He is a licensed Real Estate Broker. In his 30 year career, he has managed hundreds of construction projects worth a total of over $850M including, but not limited to, new Churches, Schools, Nursing Homes, Residences, and Hospitals.

Bill lives in Eastchester NY with his wife, Julia, daughter Christine, and son John.

Minyoung Ohm, Esq. is a staff attorney at the Catholic Legal Immigration Network (CLINIC) in the Religious Immigration Services section. She joined CLINIC in 2008 and has been exclusively practicing religious immigration law. Prior to joining CLINIC, she was an associate attorney at Carliner & Remes and practiced immigration law in a variety of areas, including asylum, family-based visa petitions, and business immigration matters. She also worked as an intern at Tahirih Justice Center handling Violence Against Women Act (VAWA) cases. She graduated from the American University’s Washington College of Law and has a B.A. in English and French from Wellesley College. She is a member of the New York State Bar.

Sue Novak  Partner – Not-for-Profit Services Group, Plante & Moran, PLLC. Sue has more than 30 years of experience in the not-for-profit industry. She has provided accounting, auditing, tax and management consulting services to a variety of not-for-profit organizations and religious congregations. She has worked with more than 75 religious congregations throughout the United States and internationally on financial statement audits, analyses of congregation resources, planning and operations. She has presented on technical accounting issues at RCRI, NATRI, LCWR, national, state, and firm not-for profit education seminars.

Sr. Perpetua Nyamasege, FSJ  is a Franciscan Sister of the congregation of the Franciscan Sisters of St. Joseph Asumbi Kenya. She obtained her Associate degree in Nursing from Inver Hills College in MN and later BSN from South University in Virginia. She is a certified medical surgical nurse working at Bon Secours Mercy hospital in Virginia. Sister Perpetua possesses knowledge of Geriatric Resource Nurse (GRN) in providing care for older adults; Nurses improving care for health system Elders (NICHE).

NICHE is a nurse driven program designed to help hospitals and health care organizations provide sensitive and exemplary care of the older adults. It uses the models of care in improving clinical outcome for the older adult patients. In addition, she is a member of International Parish Nurses, a foundation of Faith Community Nursing working as a parish nurse in her local church community.

Sr. Thu-Mai Nguyen, FMSR  is a Sister of the Daughters of Our Lady of the Holy Rosary. She is a graduate of Our Lady of Holy Cross College New Orleans with a bachelor’s degree in nursing (BSN) and later became Board Certified in Pediatric Nursing. She also attended a music therapy program at Loyola University. She has had extensive experience in geriatrics, pediatrics and has been an active volunteer for the Operation Smile program in Vietnam. In both 2011 and 2016 she was recognized as one of the Great 100 nurses of Louisiana! She is currently working fulltime at Ochsner Hospital for Children and simultaneously care for her community’s retirement home in Thibodaux, LA assisting the elderly sisters who are in need of skilled nursing, rehabilitation and hospice care.

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Krista Pankop, CPA has been with the Baker Tilly since 1995. She serves as the Wisconsin healthcare practice leader, the firm leader of the behavioral health sector and chairs the firm’s women’s affinity committee, GROW (Growth and Retention of Women). Krista specializes in serving healthcare and not-for-profit clients including senior living, religious orders and their ministries and behavioral health. Outside of the office, Krista serves as the treasurer of a sponsored ministry.

Steve Petitt, AIA, LEED AP Steve leads many of GROTH Design Group’s senior life and healthcare projects. All told, he has worked on over 2.5 million SF of senior life and healthcare projects, ranging from small tenant improvements to surgery throughput to full continuum of care campuses. Steve’s passion stems from his feeling that spaces for senior life and healthcare clients allow us to give back and truly help people. Steve also serves as a strong proponent of GROTH Design Group’s company culture and community outreach efforts.

Sr. Norma Pimentel, MJ is Executive Director of Catholic Charities of the Rio Grande Valley where she oversees the charitable arm of the Diocese of Brownsville, providing oversight of the different ministries and programs in the areas of emergency assistance, housing assistance, military assistance, clinical counseling, pregnancy care. She was instrumental in quickly organizing community resources to respond to the surge of Central Americans seeking asylum in the United States and setting up the Humanitarian Respite Center in McAllen, TX. Sister Norma received her bachelor’s degree in Fine Arts from Pan American University in Edinburg, TX; a master’s degree in Theology from St. Mary’s University in San Antonio, TX; and a master’s degree in Counseling Psychology from Loyola University in Chicago, IL.

Sr. Linda Pleiman, C.PP.S Treasurer – Sisters of the Most Precious Blood, Dayton, OH. Sister Linda Pleiman has contributed 50 years of service to God’s people as a Sister of the Precious Blood. Following four decades as a teacher and administrator, Sister Linda now serves on the leadership team of the Precious Blood community and in addition serves as treasurer for the community.

Sr. Jana Polakova, SCM is a Sister of Saints Cyril and Methodius. She is a graduate of Komenskeho University in Slovakia with a master’s in theology and history. She has also done post-graduate studies in Ethics. She is a trained practical nurse and has served in her native Slovakia as a home health nurse, a school nurse for students with intellectual disabilities, and as a middle and high school teacher. She currently does pastoral care work at Emmanuel Center, a Skilled Care and Rehabilitation Center in Danville, Pennsylvania.

Kellie Ray Partner – Not-for-Profit Services Group, Plante & Moran, PLLC. Kellie is a partner with more than 18 years of experience, who has served over 100 not-for-profit and religious organizations in accounting, auditing, tax and management consulting. She is a member of the Firm’s professional standards department, with responsibility for providing quality control reviews of not-for-profit financial statements. She has consulted with various not-for-profit organizations with respect to implementation of new auditing and accounting standards. Kellie serves as a firm-wide technical resource to engagement teams to resolve auditing and accounting issues within the not-for-profit industry group. Kellie coordinates, and is a presenter at, internal and external not-for-profit technical trainings.

Sr. Nancy Reynolds, SP, MA, JCL, is a member of the Sisters of Providence of Saint Mary-of-the-Woods, Indiana. She has a Licentiate in Canon Law from the Catholic University of America in and a master’s in mathematics from the University of Nebraska. She has served as a member of her General Council from 2001 to 2011 and as General Treasurer of her congregation from 2001 to 2013. She served as Director of the Tribunal in Evansville, Indiana from and Director of the Tribunal in San Francisco from. She has also taught Canon Law in several seminars and universities as either an Adjunct Professor or Instructor in summer programs. She has been a member of the Board of Governors of the Canon Law Society of America as a Consultant and is presently serving a three-year term as the Treasurer of that Society. She served two terms as a member of Board of the Leadership conference of Women Religious and as a member of the LCWR Executive Committee for two of those years. She has worked as a canonical consultant to numerous leadership teams and served as an Advocate for individual religious or leadership teams. She continues the ministry of canonical consultant at the present time. In 2016 Nancy was appointed by CICLSAL to serve ad nutum Sanctae Sedis as the Prioress of the Carmelite Nuns in Louisville, Kentucky.
Sr. Charlotte Roost, OSF, was born in Illinois and moved to Wisconsin while she was in grade school. After high school, she joined the Sisters of St Francis of Assisi. Her main ministry has been as a pharmacist, where she held positions of Director of Pharmacy, Associate Professor of Pharmacy Practice, and clinical pharmacist in different places throughout the United States. In 2016 she retired from pharmacy practice. She was asked by her leadership team to be the liaison between them and the design and construction project for the new convent. The project provides housing and services for sisters needing assisted living, memory care and physical care. In addition, the new construction provides congregational office space.

David Schilling, Senior Program Director - Human Rights, Interfaith Center on Corporate Responsibility, joined the staff at the Interfaith Center on Corporate Responsibility (ICCR) in 1994 and works with ICCR members and allies to engage corporations, cross-sectoral and multi-stakeholder initiatives on human rights in corporate operations and supply chains. He has participated in delegations to a number of countries visiting factories and meeting with workers and NGOs. For the past ten years, David has provided staff leadership for initiatives to counter human trafficking and modern slavery. He is part of the ICCR team building the new Investor Alliance for Human Rights. David is coordinator of ICCR’s Bangladesh Investor Initiative, a global collaboration in support of the Accord for Fire and Building Safety; member, Steering Committee of the Leadership Group for Responsible Recruitment; member, Advisory Group of the newly formed Responsible Labor Initiative of the Responsible Business Alliance and former chair, Advisory Board, Global Social Compliance Program.

Francis X. Sherman is an advocate for peace & justice as the Executive Director of Seventh Generation Interfaith Coalition for Responsible Investment (SGI) and board member of the Interfaith Center on Corporate Responsibility. SGI is a coalition of 25 faith-based and values-driven institutional investors who view the management of their investments as a powerful catalyst for social change. Frank retired after a 35-year career with Akzo Nobel, the world’s largest coatings company and a major producer of specialty chemicals based in Amsterdam, NL, where he served as president and general manager of the $1.3 billion global surface chemistry business unit. Frank gives back to the local community by counseling small business owners as a certified mentor of SCORE and is a member of the adjunct faculty of Cardinal Stritch University. He has a B.S. and M.E. in chemical engineering from Cornell University and an M.B.A. in marketing from the University of New Haven.

Eugene Shirley is the president and co-founder of Pando Populus, Inc., an entity focused on integral ecology. His professional emphasis is on launching initiatives for social impact and pulling together the people and structures needed to support them. Prior to co-founding Pando in 2014 with theologian John Cobb Jr., he was co-founder of an educational non-profit, founding editor of a quarterly journal, and for twenty-five years founding President of a documentary film production company for PBS and international broadcast distribution (up to thirty countries). His honors include a White House film premiere on human rights abuses experienced by Christians, Jews and Muslims in the USSR for International Human Rights day, and a BAFTA (“British Academy Award”) nomination for Best Documentary Series. Eugene is a former Jennings Randolph Fellow at The United States Institute of Peace and Adjunct Fellow at Hudson Institute.

Diane K. Simpkins is the secretary and treasurer of the Province of St. Joseph of the Capuchin Order, a religious organization. Diane has more than 30 years of accounting and auditing experience. Diane has vast experience with the not-for-profit sector and the municipality sector. She is also a volunteer bookkeeper for her home parish.

Sr. Anna Marie Tag, RSM is an Eldercare Consultant for the National Religious Retirement Office (NRRO). Her focus is elder care planning for Institutes significantly underfunded for their projected retirement needs, with special attention to Institutes with a small census. As Director of Retirement Services for her Community, she developed and implemented an integrated retirement plan. Formerly, she held positions at Mercy Health System, from accountant to CEO of Mercy Diversified Services, composed of five subsidiary corporations encompassing apothecaries, real estate and physician management services, elder housing and adult health services. She earned a BS in Education, a BS in Accounting and an MBA in Health Care Administration. She is a licensed Nursing Home Administrator and a frequent speaker for religious Institutes.
Todd Timmerman, CEBS, CFS, AIF® is the Founder and Managing Director of Retirement Plan Analytics (RPA). Todd and his wife Kelly live in Charlotte, NC and have 3 adult children. Todd is in his 30th year of serving retirement plan clients and advisors. Prior to founding RPA, Todd served clients and advisors at a large national recordkeeper where he was responsible for strategy on new client engagements serving retirement plan clients with $100 million and above in assets. Todd and his team at RPA are on a mission to help clients make informed decisions for plan improvement. RPA serves both financial advisors and retirement plan sponsors with processes and strategies that seek to optimize plan success and drive desired participant outcomes. In the last 4 years RPA has earned over 200 clients and consults on plan assets in excess of $15 billion.

Daniel Tretow is serving as the Director of Financial Services for the School Sisters of St. Francis – International Offices in Milwaukee. Dan is on the RCRI Board and an active member of WITRI, the Wisconsin CORT region. He is the Board President for Seventh Generation Interfaith Coalition for Responsible Investment and has been active in socially responsible investing since the mid-1980s.

Matt Wade is currently CFO/Treasurer for the Sisters of Charity of St. Augustine in Cleveland, Ohio. He served in congregational finance positions with the Marist Fathers & Brothers in Washington, DC and later worked as CFO for the Medical Mission Sisters in Philadelphia. Matt worked as Associate Director of the Conference of Major Superiors of Men from 2001-05. He also has experience in Latin America, having worked in Peru. He has assisted the NRRO as a consultant for the Planning and Implementation Process. Matt was involved with RCRI’s development committee for the new TRENDS Versions 2013 and 2015. He holds degrees in Business Administration from John Carroll University and Religion & Religious Education from The Catholic University of America. He currently serves on the RCRI Board.

Stephen M. Waldorf is a principal partner and managing director of Waldorf Risk Solutions. Stephen earned his Bachelor of Arts degree in history from Catholic University of America in Washington, DC. Stephen has worked with his father and brother Bill at Waldorf brokerage firm for over 27 years. He is a licensed property and casualty insurance broker in New York State and maintains licenses in over 28 states. Stephen has excelled in designing, structuring and implementing alternative risk transfers vehicles on behalf of religious and not-for-profit entities throughout North America. In 1998 Stephen completed the two-year Pastoral Formation program through the Diocese of Rockville Centre. In 2011 Stephen received the Caritas Medal from Molloy College. Stephen maintains a commercial pilot’s license and has logged over 3500 hours in complex aircraft.

Sr. Andrea Westcamp, OSB is the canonical treasurer of the Benedictine Sisters of Virginia. With a background in pastoral counseling and spiritual direction, she is very interested in using investments as vehicle for social responsibility and change. Sister Andrea is a member of the Benedictine Coalition for Responsible Investment.
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Phone: +1 410-537-5303  
**Contacts:**  
Jim Dugan, Nicole Nesbitt  
**Services Provided:**  
Investment Management
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<th><strong>C5 Capital</strong></th>
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<tr>
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<tr>
<td><strong>Contacts:</strong></td>
<td>Zulfe Ali, Tamara Zeidan</td>
</tr>
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<td>PO Box 99</td>
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<tr>
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<tr>
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<tr>
<td><strong>Contacts:</strong></td>
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<td></td>
</tr>
<tr>
<td>West Allis, WI 53214</td>
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</tr>
<tr>
<td>Phone: +1 414-813-8036</td>
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<tr>
<td><strong>Contacts:</strong></td>
<td>Brad Forbush, Doug Reading</td>
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<tr>
<td>Washington, DC 20017</td>
<td></td>
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<tr>
<td>Phone: +1 202-756-5545</td>
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<tr>
<td><strong>Contacts:</strong></td>
<td>Daniel Misleh, Dan Last</td>
</tr>
<tr>
<td><strong>Services Provided:</strong></td>
<td>Alternative/Comm. Investments, Strategic/Models for Planning, Other</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Catholic Investment Services</strong></th>
<th><strong>Booth #503</strong></th>
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</thead>
<tbody>
<tr>
<td>200 State St 13th FL</td>
<td></td>
</tr>
<tr>
<td>Boston, MA 02109</td>
<td></td>
</tr>
<tr>
<td>Phone: +1 617-758-6588</td>
<td></td>
</tr>
<tr>
<td><strong>Contacts:</strong></td>
<td>Zela Astarjian, Jeremy Taylor</td>
</tr>
<tr>
<td><strong>Services Provided:</strong></td>
<td>Investment Management</td>
</tr>
</tbody>
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<table>
<thead>
<tr>
<th><strong>Catholic Legal Immigration Network</strong></th>
<th><strong>Booth #807</strong></th>
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<tbody>
<tr>
<td>8757 Georgia Avenue</td>
<td></td>
</tr>
<tr>
<td>Suite 850</td>
<td></td>
</tr>
<tr>
<td>Silver Spring, MD 20910</td>
<td></td>
</tr>
<tr>
<td>Phone: +1 301-565-4845</td>
<td></td>
</tr>
<tr>
<td><strong>Contacts:</strong></td>
<td>Minyoung Ohm, Kate Adams</td>
</tr>
<tr>
<td><strong>Services Provided:</strong></td>
<td>Legal Services</td>
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<thead>
<tr>
<th><strong>Catholic Mutual Group</strong></th>
<th><strong>Booth #212</strong></th>
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<tbody>
<tr>
<td>10843 Old Mill Road</td>
<td></td>
</tr>
<tr>
<td>Omaha, NE 68154</td>
<td></td>
</tr>
<tr>
<td>Phone: +1 800-228-6108</td>
<td></td>
</tr>
<tr>
<td><strong>Contacts:</strong></td>
<td>Greg Standish, Paula Smith</td>
</tr>
<tr>
<td><strong>Services Provided:</strong></td>
<td>Insurance Consulting</td>
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<table>
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<tr>
<th><strong>CBIS</strong></th>
<th><strong>Booth #409, 411</strong></th>
</tr>
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<tbody>
<tr>
<td>20 N Wacker Drive</td>
<td></td>
</tr>
<tr>
<td>Suite 2000</td>
<td></td>
</tr>
<tr>
<td>Chicago, IL 60606</td>
<td></td>
</tr>
<tr>
<td>Phone: +1 312-803-4737</td>
<td></td>
</tr>
<tr>
<td><strong>Contacts:</strong></td>
<td>Karen Byrnes, Jeffrey A. McCroy John W. Geissinger</td>
</tr>
<tr>
<td><strong>Services Provided:</strong></td>
<td>Investment Management</td>
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<tr>
<th><strong>Christian Brothers Services</strong></th>
<th><strong>Booth #309, 311</strong></th>
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<tbody>
<tr>
<td>Christian Brothers Services</td>
<td></td>
</tr>
<tr>
<td>1205 Windham Parkway</td>
<td></td>
</tr>
<tr>
<td>Romeoville, Illinois 60446</td>
<td></td>
</tr>
<tr>
<td>Phone: +1 630-378-3089</td>
<td></td>
</tr>
<tr>
<td><strong>Contacts:</strong></td>
<td>Bob Fiorentino, Matt Robbie, Geraline Hoyler, Rich McKenna, Michael Quirk, Buffy Blanton, Mary Foley, Tom Hetland, Michael Lesiak, Peter Tripp, Yvonne Weidner</td>
</tr>
<tr>
<td><strong>Services Provided:</strong></td>
<td>Estate Planning/Trust Services, Financial Management, Fundraising/Development Health Care Management, HR/Consulting, Internet/Network/IT, Investment Consulting, Real Estate/Property/Utilization, Retirement Planning, Social Security</td>
</tr>
<tr>
<td>Company</td>
<td>Booth #</td>
</tr>
<tr>
<td>-----------------------------------------------------</td>
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</tr>
<tr>
<td>Community Capital Management</td>
<td>#300</td>
</tr>
<tr>
<td>Contacts:</td>
<td></td>
</tr>
<tr>
<td>Services Provided:</td>
<td></td>
</tr>
<tr>
<td>Crossmark Global</td>
<td>#510</td>
</tr>
<tr>
<td>Contacts:</td>
<td></td>
</tr>
<tr>
<td>Services Provided:</td>
<td></td>
</tr>
<tr>
<td>Dana Investment Advisors</td>
<td>#604</td>
</tr>
<tr>
<td>Contacts:</td>
<td></td>
</tr>
<tr>
<td>DeMarche Associates, Inc.</td>
<td>#403</td>
</tr>
<tr>
<td>Contacts:</td>
<td></td>
</tr>
<tr>
<td>DiMeo Schneider and Associates, LLC</td>
<td>#405</td>
</tr>
<tr>
<td>Contacts:</td>
<td></td>
</tr>
<tr>
<td>Services Provided:</td>
<td></td>
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<tr>
<td>Doering Fleet Management</td>
<td>#304</td>
</tr>
<tr>
<td>Contacts:</td>
<td></td>
</tr>
<tr>
<td>Services Provided:</td>
<td></td>
</tr>
<tr>
<td>Ethos Logos Investments</td>
<td>#611</td>
</tr>
<tr>
<td>Contact:</td>
<td></td>
</tr>
<tr>
<td>F.L.Putnam Investment Management Company</td>
<td>#507</td>
</tr>
<tr>
<td>Contacts:</td>
<td></td>
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A Glorious History to Remember,
<table>
<thead>
<tr>
<th><strong>FEG Investment Advisors</strong></th>
<th><strong>Booth #202</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>201 East Fifth Street</td>
<td></td>
</tr>
<tr>
<td>Cincinnati, OH 45202</td>
<td></td>
</tr>
<tr>
<td>Phone: +1 513-719-5053</td>
<td></td>
</tr>
<tr>
<td><strong>Contacts:</strong></td>
<td>Matt Finke, Alan Bergin</td>
</tr>
<tr>
<td><strong>Services Provided:</strong></td>
<td>Alternative/Comm. Investments, Investment Consulting, Investment Management, SRI/Screening</td>
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<table>
<thead>
<tr>
<th><strong>Fitzpatrick Group of Wells Fargo Advisors</strong></th>
<th><strong>Booth #702</strong></th>
</tr>
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<tbody>
<tr>
<td>600 52nd St</td>
<td></td>
</tr>
<tr>
<td>Suite 100</td>
<td></td>
</tr>
<tr>
<td>Kenosha, WI 53140</td>
<td></td>
</tr>
<tr>
<td>Phone: +1 262-657-2555</td>
<td></td>
</tr>
<tr>
<td><strong>Contacts:</strong></td>
<td>Edward Fitzpatrick, Andrew Fitzpatrick</td>
</tr>
<tr>
<td><strong>Services Provided:</strong></td>
<td>Investment Consulting, Investment Management, Retirement Planning, SRI/Screening</td>
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<tr>
<th><strong>Gallagher</strong></th>
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<tr>
<td>2850 Golf Rd</td>
<td></td>
</tr>
<tr>
<td>Rolling Meadows, IL 60008</td>
<td></td>
</tr>
<tr>
<td>Phone: +1 630-285-3898</td>
<td></td>
</tr>
<tr>
<td><strong>Contacts:</strong></td>
<td>Peter Persuitti, Phil Bushnell, Lisa Marcotullio</td>
</tr>
<tr>
<td><strong>Services Provided:</strong></td>
<td>HR/Consulting, Insurance Consulting, Retirement Planning</td>
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<tr>
<th><strong>GAMCO Asset Management</strong></th>
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<tbody>
<tr>
<td>One Corporate Center</td>
<td></td>
</tr>
<tr>
<td>Rye, NY 10580</td>
<td></td>
</tr>
<tr>
<td>Phone: +1 914-921-5237</td>
<td></td>
</tr>
<tr>
<td><strong>Contacts:</strong></td>
<td>Christopher Desmarais, Marisa Avansino</td>
</tr>
<tr>
<td><strong>Services Provided:</strong></td>
<td>Investment Management, SRI/Screening</td>
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<thead>
<tr>
<th><strong>Graystone Consulting</strong></th>
<th><strong>Booth #811</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>227 W Monroe St Ste 3400</td>
<td></td>
</tr>
<tr>
<td>Chicago, IL 60606</td>
<td></td>
</tr>
<tr>
<td>Phone: +1 312-648-3081</td>
<td></td>
</tr>
<tr>
<td><strong>Contacts:</strong></td>
<td>Jake Barnett, Kelli Schrade</td>
</tr>
<tr>
<td><strong>Services Provided:</strong></td>
<td>Alternative/Comm. Investments, Financial Management, Investment Consulting, Investment Management, SRI/Screening</td>
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<table>
<thead>
<tr>
<th><strong>Great Lakes Advisors</strong></th>
<th><strong>Booth #207</strong></th>
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<tbody>
<tr>
<td>231 S LaSalle St</td>
<td></td>
</tr>
<tr>
<td>Floor 4</td>
<td></td>
</tr>
<tr>
<td>Chicago, IL 60604</td>
<td></td>
</tr>
<tr>
<td>Phone: +1 312-553-3743</td>
<td></td>
</tr>
<tr>
<td><strong>Contacts:</strong></td>
<td>Laura West, Sr. Margaret Mary Cosgrove, Heather Alvarado</td>
</tr>
<tr>
<td><strong>Services Provided:</strong></td>
<td>Financial Management, Investment Consulting, Investment Management</td>
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<table>
<thead>
<tr>
<th><strong>GROTH Design Group</strong></th>
<th><strong>Booth #608</strong></th>
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<tbody>
<tr>
<td>NS8 W6181 Columbia Road</td>
<td></td>
</tr>
<tr>
<td>Cedarburg, WI 53012</td>
<td></td>
</tr>
<tr>
<td>Phone: +1 262-377-8001</td>
<td></td>
</tr>
<tr>
<td><strong>Contacts:</strong></td>
<td>Steve Peit, Nathan Pamperin</td>
</tr>
<tr>
<td><strong>Services Provided:</strong></td>
<td>Architects</td>
</tr>
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<table>
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<tr>
<th><strong>Guest House</strong></th>
<th><strong>Booth #610</strong></th>
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<tbody>
<tr>
<td>1601 Joslyn Road</td>
<td></td>
</tr>
<tr>
<td>Lake Orion, MI 48360</td>
<td></td>
</tr>
<tr>
<td>Phone: +1 248-393-8964</td>
<td></td>
</tr>
<tr>
<td><strong>Contacts:</strong></td>
<td>Christopher Stark, Elaine Dombi</td>
</tr>
<tr>
<td><strong>Services Provided:</strong></td>
<td>Other</td>
</tr>
</tbody>
</table>
**Health Dimensions Group**
 Booth #809
12900 Whitewater Dr
Hopkins, MN 55343
Phone: +1 763-537-5700

**Contacts:**
Renee Flis, Darrin Hull

**Services Provided:**
Facility Management, HR/Consulting, Strategic/Models for Planning, Other

---

**Hope Federal Credit Union/ Hope Enterprise Corporation**
 Booth #901
4 Old River Pl
Jackson, MS 39202
Phone: +1 601-944-9307

**Contacts:**
Mary Bruce Alford, Robbye Good

**Services Provided:**
Banking Services, Other

---

**Hoffman**
 Booth #209
122 E College Ave
Suite 1G
Appleton, WI 54911
Phone: +1 920-731-2322

**Contacts:**
Julie Heiberger, Pat Del Ponte, Todd Dvorak

**Services Provided:**
Architects

---

**IFF**
 Booth #307
333 S Wabash Ave
Suite 2800
Chicago, IL 60604
Phone: +1 312-629-0060

**Contacts:**
Katherine Pickett, Debra Walker Johnson

**Services Provided:**
Facility Management, Real Estate/Property/Utilization, Other

---

**Innovest Portfolio Solutions**
 Booth #803
4643 S Ulster St
Denver, CO 80237
Phone: +1 303-694-1900

**Contacts:**
Natalie Roderick, Christine Hudek

**Services Provided:**
Financial Management

---

**IWP Capital LLC**
 Booth #110
200 N Mesquite St
Suite 205
Arlington, TX 76011
Phone: +1 888-882-2046

**Contacts:**
Thomas Payne, Nathan Hoelscher

**Services Provided:**
Financial Management, Investment Consulting, Investment Management, Proxy Voting Services, SRI/Screening

---

**JAG Capital Management / JA Glynn**
 Booth #305
9841 Clayton Road
St. Louis, MO 63124
Phone: +1 314-997-1277

**Contacts:**
Sandra Shotwell, Michael Walsh, Matthew Walsh

**Services Provided:**
Financial Management, Investment Management, Proxy Voting Services, SRI/Screening

---

**Kerber, Eck & Braeckel LLP**
 Booth #707
3200 Robbins Road, Suite 200A
Springfield, IL 62704-6525
Phone: +1 217-789-0960

**Contacts:**
Bethany Jaeger, Kate Ward, Phil Capps, Rick Gratza, Scott Marr, Chris Slaats, Cameron Sweatman,

**Services Provided:**
Acct./Auditing/Actuarial Services, Estate Planning/Trust Services, Financial Management, Investment Management, Retirement Planning, Tax Services

---

**Labouré Society**
 Booth #603
1365 Corporate Center Curve, S
Eagan, MN 55121
Phone: +1 651-212-4977

**Contacts:**
Dorothy Hargrave, John Flanagan

**Services Provided:**
Other
Lakeview Institutional  Booth #709
1201 Peachtree Street NE, Suite 1850
Atlanta, GA 30361
Phone: +1 404-410-7426

Contacts:
Adrian Chastain, Carolyn LaRocco, Nicole Reardon

Services Provided:
Investment Consulting, SRI/Screening

Marquette Associates, Inc.  Booth #412
180 N. LaSalle
Suite 3500
Chicago, IL 60601
Phone: +1 312-527-5500

Contacts:
Lili Park, Nichole Roman-Bhatty, Nicole Johnson-Barnes

Services Provided:
Investment Consulting

Mercy Loan Fund  Booth #400
1600 Broadway, Suite 2000
Denver, CO 80202
Phone: +1 303-830-3447

Contact:
Laurie Glasgow-Gill

Services Provided:
Alternative/Comm. Investments

MicroVest Capital Management  Booth #708
7315 Wisconsin Ave
Suite 300W
Bethesda, MD 20814
Phone: +1 301-664-6680

Contacts:
Douglas Young, Alex Ergon

Services Provided:
Alternative/Comm. Investments, Investment Management, Other

Morgan Stanley  Booth #703
14 2nd St SW Ste 201
Rochester, MN 55902
Phone: +1 507-529-4412

Contacts:
Kathleen Allison, Kathleen Allison

Services Provided:

National Religious Vocation Conference  Booth #701
5401 South Cornell Avenue
Suite 207
Chicago, IL 60615
Phone: +1 773-595-4010

Contacts:
Maureen Cetera, Philip Loftus

Services Provided:
Other

NRRO  Booth #100
3211 Fourth Street NE
Washington, DC 20017-1194
Phone: +1 202-541-3217

Contacts:
Stephanie Still, Monica Glover, Karen Canas

Services Provided:
Retirement Planning

Partners for the Common Good  Booth #407
1444 Eye Street, NW, Suite 201
Washington, DC 20005
Phone: +1 202-689-8935

Contacts:
Carla Mannings, Jeannine Jacokes

Services Provided:
Real Estate/Property/Utilization, Other
### 2019 National Conference

#### Pinnacle Associates
Booth #108

335 Madison Ave  
11th Floor  
New York, NY 10017  
Phone: +1 212-652-3250  

**Contacts:**  
Monica Jalife, Kimon Passios  

**Services Provided:**  
Investment Management, Retirement Planning, SRI/Screening

#### Plante Moran
Booth #509, 511

27400 Northwestern Hwy  
Southfield, MI 48034  
Phone: +1 248-603-5103  

**Contacts:**  
Gerrard Gumbleton, Sue Novak, Rich Berretta, Samantha Campau, Adam Counts, Josh Jarvie, Kellie Ray, Douglas Smith, Thomas Zimmer, Erin George, Jeff Zeleji  

**Services Provided:**  
Acct./Auditing/Actuarial Services, Estate Planning/Trust Services, Investment Consulting, Real Estate/Property/Utilization, Tax Services

#### Promethos Capital
Booth #805

101 Federal Street  
Boston, MA 02110  
Phone: +1 617-818-2400  

**Contacts:**  
Joe Sylvester, Ivka Kalus  

**Services Provided:**  
Investment Management

#### REALM
Booth #502

1251 Swift Creek  
Greensboro, GA 30642  
Phone: +1 800-995-5184  

**Contacts:**  
Robin Eggert, Stuart Skinner  

**Services Provided:**  
Fundraising/Development Health Care Management, Real Estate/Property/Utilization, Retirement Planning, Strategic/Models for Planning

#### Reinhart Partners, Inc.
Booth #102

1500 W Market St  
Suite 100  
Mequon, WI 53092  
Phone: +1 262-241-2020  

**Contact:**  
Joel Dykman  

**Services Provided:**  
Financial Management, Investment Consulting, Investment Management

#### Religious Communities Impact Fund
Booth #208

462 Elwood Avenue  
Suite 2  
Oakland, CA 94610  
Phone: +1 510-836-7556  

**Contacts:**  
Corinne Florek, Leora Linnenkugel  

**Services Provided:**  
Alternative/Comm. Investments

#### Saint John Vianney Center
Booth #600

151 Woodbine Rd  
Downingtown, PA 19335  
Phone: +1 610-518-2047  

**Contact:**  
Karen Cote  

**Services Provided:**  
Other

#### Sarasin Asset Management
Booth #210

Juxon House  
100 St Paul’s Churchyard  
London EC4M 8BU  
Phone: +44 20 7038 7000  

**Contacts:**  
John Handford, Sara Yemane, Ruadhri Duncan, Andrew Stewart  

**Services Provided:**  
Investment Management
A Glorious History to Remember, a Great History Yet to Be Accomplished

RESOURCE CENTER FOR RELIGIOUS INSTITUTES

SCHEMMER ASSOCIATES Booth #410
3100 SE Gateway Dr
Suite 200
Grimes, IA 50111
Phone: +1 515-957-7610

Contacts: Shane Larsen, Kelsey Fleenor

Services Provided:
Architects, Estate Planning/Trust Services, Facility Management

Southdown Institute Booth #204
18798 Old Yonge St
Holland Landing, ON L9N0L1
Phone: +1 905-727-4214

Contacts: Dorothy Heiderscheit, Stephan Kappler

Services Provided:
Other

State Street Global Advisors Booth #504
1 Lincoln Street
Boston, MA 02211
Phone: +1 617-664-9105

Contacts: Arman Palian, Patrick Hearne

Services Provided:
Investment Management, SRI/Screening

The Concord Advisory Group Booth #301
700 Alexander Park Dr
Suite 203
Princeton, NJ 08540
Phone: +1 609-987-9000

Contacts: Bryan Joseph, Marissa Hine

Services Provided:
Investment Consulting

The Nolan Group of Merrill Lynch Booth #211
69 State Street - 16th Floor
Albany, NY 12207
Phone: +1 518-462-8331

Contacts: Derek Nolan, Cristina Fineza

Services Provided:
Investment Consulting, Investment Management, SRI/Screening

Trillium Asset Management Booth #501
60 South St, Suite 1100
Boston, MA 02111
Phone: +1 617-423-6655

Contacts: Cheryl Smith, Alex Jovanovic, Lisa MacKinnon

Services Provided:
Investment Management, SRI/Screening

Trinity Senior Services Management Booth #402
17410 College Pkwy
Livonia, MI 48152
Phone: +1 734-343-6683

Contacts: William Healy, Steve Kastner

Services Provided:
Other

ViaGem Investment Services Booth #401
12412 Powerscourt Drive
Suite 240
St. Louis, MO 63131
Phone: +1 314-307-1090

Contact: Steve Zielinski

Services Provided:

Waldorf Risk Solutions Booth #710, 712
24 West Carver Street | First Floor
Huntington, NY 11743
Phone: +1 631-423-9500

Contacts: Stephen Waldorf, Colleen Biemer

Services Provided:
Insurance Consulting
Wipfli LLP  
Booth #201

10000 W Innovation Dr  
Ste 250  
Wauwatosa, WI 53226  
Phone: +1 509-232-2735

Contacts:  
Michael Edwin, Caryn Adams

Services Provided:  
Acct./Auditing/Actuarial Services

Zevin Asset Management  
Booth #308

2 Oliver Street  
Suite 806  
Boston, MA 02109  
Phone: +1 617-742-6666

Contacts:  
Sonia Kowal, Steven Dray

Services Provided:  
Investment Management, SRI/Screening

Zielinski Companies  
Booth #605

1859 Bowles Avenue, Suite 100  
Fenton, MO 63026  
Phone: +1 800-489-2150

Contacts:  
Peggy Stauder, Doug Briles

Services Provided:  
Acct./Auditing/Actuarial Services, Alternative/Comm. Investments, Banking Services, Financial Management, Investment Management, Real Estate/Property/Utilization, Retirement Planning, Social Security, Strategic/Models for Planning, Tax Services, Other
CONFERENCE PARTICIPANTS (AS OF AUGUST 30, 2019)

Martha Kumi Acheampong
Franciscan Sisters of Peace
Haverstraw, New York

Dawn Achs, SSND
School Sisters of Notre Dame
St. Louis, Missouri

Kate Adams
CLINIC
Silver Spring, Maryland

Francisca Aguillon
Sisters of Our lady of Charity of the Good Shepherd
Carrollton, Ohio

Sr. Sylvia Ahr, OSB
Benedictine Sisters
Boerne, Texas

Ginny Akes
Daughters of Charity of St. Vincent de Paul
Saint Louis, Missouri

Sr. Sara Aldridge, OSF
Sisters of St. Francis
Tiffin, Ohio

Martha Alle
Ursuline Sisters of Mount Saint Joseph
Maple Mount, Kentucky

Bonnie Allison
Ursuline Sisters of Louisville
Louisville, Kentucky

Sr. Sister Jeanne Ambre, SSCM
Sisters of Saints Cyril and Methodius
Danville, Pennsylvania

Dan Anderson
Dominican Sisters of Springfield, IL
Springfield, Illinois

Margaret Anderson, OP
Dominican Sisters of Hope
Ossining, New York

Margaret Ann Andrado, OSBM
Sisters of Saint Basil
Uniontown, Pennsylvania

Allen M. Andrews
Congregation of the Mission
Philadelphia, Pennsylvania

Beth Ansheles
Servants of the Immaculate Heart of Mary
Biddeford, Maine

Sr. Mary Helena Aquino, OSSR
The Redemptoristine Nuns
Liguori, Missouri

Linda Artis
Religious Sisters of Charity
Culver City, California

Sue Artone-Fricke, OSF
Sisters of St. Francis of Penance and Christian Charity
Denver, Colorado

Patricia Ashburn
Conventual Franciscan Friars
Ellicott City, Maryland

Sr. Janice Bader, CPPS
Sisters of the Most Precious Blood
O’Fallon, Missouri

Sr. Elaine Bain, SNDdeN
Sisters of Notre Dame de Namur
Baltimore, Maryland

Lori Baker Kusnierewicz
Sisters of the Sorrowful Mother
Brown Deer, Wisconsin

Sonia Baldwin
Consecrated Women of Regnum Christi
Cumming, Georgia

Brian Bangart
Franciscan Friars ABVM
Frankin, Wisconsin

Sr. Aileen Bankemper, OSB
St. Walburg Monastery
Villa Hills, Kentucky

Sean Bannon
Felician Sisters of North America
Beaver Falls, Pennsylvania

Sr. Janet Barnard, OSB
Benedictine Monastery of St. Gertrude
Cottonwood, Idaho

Deann Barnett
Sisters of St. Francis – Colorado Springs
Colorado Springs, Colorado

Susan Barrett
Sisters of Christian Charity
Wilmette, Illinois

Barbara Barry, SNDdeN
Sisters of Notre Dame de Namur
East/West Unit
Ipswich, Massachusetts

Jack Bartley
Sisters of Mercy of the Americas
Belmont, North Carolina

Sr. Nancy Bauer, OSB
The Catholic University of America
Washington, District of Columbia

Sr. Sr Luisa Bayate, OSC
Franciscan Monastery of St Clare
Cincinnati, Ohio

Robert Bazzarelli
Ursuline Sisters of Cleveland
Pepper Pike, Ohio

Paula Beatrez
Congregation of the Blessed Sacrament
Highland Heights, Ohio

Daniel Beaty
Abbey of the Genesee
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<th>Location</th>
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