David G. Adams
Vice President of Products and Services
Board of Pensions

David oversees product and service development, and is the Board of Pensions' chief actuary. He joined the Board of Pensions in 1994 as chief financial officer.

Previously, David spent 20 years as a consultant with Towers Perrin where he assisted numerous clients in the design, funding and administration of employee health care and retirement plans.

David received a bachelor's degree in mathematics from Eureka College in Illinois, and a master's degree in actuarial mathematics from the University of Michigan. He is a fellow of the Society of Actuaries and a member of the American Academy of Actuaries.

Louis P. Barbarin
Chief Financial Officer and Treasurer
Ministers and Missionaries Benefit Board
American Baptist Church

Louis P. Barbarin a Certified Public Accountant, has served The Ministers and Missionaries Benefit Board since October 1998 as Chief Financial Officer and Treasurer. Prior to his appointment to MMBB, Mr. Barbarin was deputy executive director and treasurer of the American Baptist Board of Education and Publication.

Cindy Beach
Director, Member Education, The Board of Pensions of the Presbyterian Church (U.S.A.)

Cindy Beach has served The Board of Pensions of the Presbyterian Church (U.S.A.) as the Director of Member Education since 2004. Before joining the Board she had extensive experience in employee benefits and corporate training at Towers Perrin, a benefits consulting firm in Philadelphia. Cindy graduated from Penn State University.

Barbara A. Boigegrain
General Secretary and CEO
General Board of Pension and Health Benefits of The United Methodist Church

Barbara A. Boigegrain is the General Secretary and CEO of the General Board of Pension and Health Benefits of The United Methodist Church. Over the past 11 years she has worked to bring caring service and professional management to the 65,000 plan participants and the $13.7 billion investment portfolio. Prior to the General Board, Barbara spent 11 years with international consulting firm Towers Perrin, both in Los Angeles and opening their San Diego office. In addition, she worked with KPMG Peat Marwick and a Fortune 500 Company in employee benefits.

Lowell B. Catlett, PhD
Dean of the College of Agriculture and Home Economics
New Mexico State University

Dr. Lowell Catlett is a Regent’s Professor of Economics, Agriculture and Genetic Engineering at New Mexico State University where he became Dean of the College of Agriculture and Home Economics in January 2006. He is an exciting futurist whose knowledge of technologies and their implications on the way we will live and work is addressed in his varied and upbeat presentations which he delivers both nationally and internationally.

The Reverend Canon Patricia M. Coller
Vice President for Retirement Programs and Services, the Church Pension Fund

Pat is Senior executive Vice President for Retirement Programs and Services, the Church Pension Fund. A priest of the Episcopal Church, Pat worked in a parishes in Pennsylvania and Massachusetts, and then for the Bishop in the Diocese of Western Massachusetts before joining the staff of the Church Pension Fund in 2000. She has oversight of all of the retirement programs, including the clergy and lay pension plans, CREDO, research and Recorder of Ordinations, parish and diocesan administrative services, and International Relations.

Michael A. Downs
President and Chief Executive Officer
The Pension Boards

Michael A. Downs is President and Chief Executive Officer of the Pension Boards, which provides comprehensive benefits plans for United Church of Christ employees with assets of more than $2.8 billion. Downs assumed the role of President/CEO of the Pension Boards in March 2002.
He has served in the national setting of the United Church of Christ for more than 16 years, as Secretary for Local Church Building for the UCC Board for Homeland Ministries (BHM) from 1991-1997; founding Vice President of the Cornerstone Fund; and Executive Director of the UCC Insurance Board (1997-2002). Under his leadership, the Insurance Board also formed a subsidiary captive insurance company, the United Church Insurance Company. A veteran of the US Marine Corps, Downs has served in leadership positions on numerous professional and not-for-profit boards and committees, both nationally and locally. A life-long UCC member, he presently attends The Riverside Church in New York City and is an associate member of Naples United Church of Christ in Naples, Florida.

Tom Drez
Chief Information Officer
Christian Brothers Services

Tom Drez serves as Chief Information Officer and Managing Director of the Information & Communication Services (ICS) division. He joined Christian Brothers Services in 1987 with the responsibility to apply the use of information technology to further business initiatives. This includes oversight of operations, software development, education, graphic arts including website development, and communications with responsibilities for implementing, supporting, and maintaining all aspects of computer, telephone, and audio/visual systems ensuring that technology usage is aligned with divisional and organizational goals. He also has responsibility for information protection including privacy and security.

Tom holds a Bachelor of Arts degree in Computer Science along with the designation of Certified Information Privacy Professional (CIPP). He has enjoyed participation in many CBA Annual Conferences.

Lee Dukes, M.B.A
Vice President of Wellness Solutions
Matria Healthcare, Inc.

Mr. Dukes is Senior Vice President of Wellness Solutions for Matria Healthcare. Mr. Dukes' primary expertise is social marketing related to population health. Among the clients he serves are Bell Helicopter, Shell Oil, PepsiCo, The Container Store, SMU, Texas Health Resources, and the U.S. Army.

Mr. Dukes has served as Associate Director of Behavioral Health at the Cooper Institute, President of EverGreen Press, Director of the Campbell Soup Institute for Health and Fitness, and Executive Director of the Mississippi Governor's Council on Physical Fitness and Sports. He served as Chairperson of the Mississippi State Board of Health Dietetic Advisory Council, Vice President of the National Association of Governors' Councils, Vice President of the Association for Worksite Health Promotion, and Director of the North American Networking Workshop on Health and Fitness.

He has a BA from Mississippi College, where he was All-American in track, and an MBA from Temple University.

Curtis G. Fee, CFA
Vice President and Chief Investment Officer at the Board Pensions of the Evangelical Lutheran Church in America

Curt Fee is Vice President and Chief Investment Officer at the Board Pensions of the Evangelical Lutheran Church in America. He leads investment programs totaling $7.5 billion, including retirement and other benefit assets.

Curt has over 16 years of experience with institutional money management firms and major insurance companies including the Principal Financial Group, AEGON, and hedge fund manager EBF & Associates as well as his service with the Board of Pensions.

Curt is a Chartered Financial Analyst and holds the Fellow, Life Management Institute designation with distinction. His education includes graduate studies at the University of Illinois and the University of Iowa where he received a bachelor's degree in business administration with high distinction and a master's degree in finance.

Spencer P. Glendon, PhD
Senior Vice President, Partner, and Director, Global Macroanalysis Research

Spencer is the director of the Global Macroanalysis Research Group at Wellington Management. The Group helps shape the economic, corporate, and political outlook of the firm's portfolio managers, analysts, and clients. In addition to his responsibilities as director, Spencer pursues an active research agenda. As a specialist on greater China, he researches the structural and cyclical changes in China to provide insights to investing both in Asia and around the world. In addition, he is responsible for leading the Macro Group and the firm in analysis and discussions of global issues. His research includes topics such as commodity demand in emerging markets, international trade dynamics, and capital market development.

Prior to joining Wellington Management in 1999, Spencer was credit director for the European Bank for Reconstruction and Development in Nizhny-Novgorod, Russia (1994), credit analyst for the South Shore Bank of Chicago (1992 – 1993), and engineer for Ford Motor Company (1989).

Spencer earned his PhD (1999) and AM (1996) in economics from Harvard University. In addition, he holds a BS in industrial engineering from Northwestern University (1991) and was a Fulbright scholar at the Universität zu Köln in Germany (1992).

Jewelie A. Grape
Associate General Counsel
Board of Pensions of the Evangelical Lutheran Church in America

Jewelie A. Grape is Associate General Counsel for the Board of Pensions of the Evangelical Lutheran Church in America (ELCA). She is responsible for assisting the General Counsel in providing legal advice and protecting legal interests of the Board and the ELCA. Before joining the Board in 2003, Jewelie practiced employee benefits law with a large Minneapolis firm.

Anna Hoover
Vice President, Retirement Benefits
Board of Pensions of the Presbyterian Church (U.S.A.)

Anna Hoover is the vice president, Retirement Benefits, at the Board of Pension of the Presbyterian Church (U.S.A.). She has been at the Board for 8 years. Previously she was at Aon Consulting for 19 years as a pension actuary and consultant.

Dan Hotchkiss
Author and congregational consultant, Albin Institute

Dan Hotchkiss has consulted with hundreds of churches and synagogues across the American religious spectrum on a wide variety of issues. Some areas where Dan is currently focusing his writing, teaching, and consulting include:

<u>Planning</u>
Healthy congregations have a clear sense of vision or mission that shapes who they are and what they do. In planning, it is often more useful to build on strengths than to fret about weaknesses. Planning can be anything from choosing a short-term project that can be successful quickly to a long process of â€œHoly Conversation.â€ Dan helps congregations to choose the planning process that is right for them at a given moment. He leads the Alban seminar on planning, â€œShaping Holy Conversations.â€

<u>Governance</u>
Dan often helps congregations to move beyond frustrating and ineffective ways of managing the work of boards, clergy, and staff. Good governance starts with clearly defined roles and authority; it succeeds when lay and professional leaders lead ministry together as collaborating partners. How much time does your board or committee spend managing programs? How much time do your program leaders (paid and volunteer) spend seeking approval for choices they could be trusted to make on their own? True partnership begins with clear role boundaries, effective delegation, and a constructive system of accountability. Dan can help you whether you want to sharpen leadersâ€™ skills, reorganize to grow, or consider an entirely new model for governance.

<u>Clergy coaching</u>
Dan coaches his colleagues through regular conversation, homework assignments, feedback, and evaluation. Coaching begins with a no-charge conversation about the potential clientâ€™s needs, anxieties, hopes, and objectives. Optionally, Dan will come to the clientâ€™s place of work to â€œshadowâ€ for a day, enabling him to observe the clientâ€™s leadership style. The coaching conversations, which can take place on the phone or in person, typically happen monthly for an hour over a six-month period. Coaching clients can contact Dan by phone or email to check in about issues as they arise.

<u>Financial assessment</u>
Financial communication is a challenge for many congregations. Dan will examine your financial and giving records and provide a report answering the questions you identify, such as: Is our budget sustainable? Where are we headed? Do we depend too much on a few givers? What stewardship strategy will best move us toward our goals? Should we worry about debt? Are we handling invested reserves and endowment funds responsibly? How can we encourage members to add to these funds? A financial assessment can stand alone or serve as part of a larger planning process.

Del Johnson
Seventh-day Adventist Church

Del Johnson has worked for the Seventh-day Adventist Church for thirty-one years in financial administration, healthcare governance and retirement. As a missionary for 17 years he has studied healthcare and retirement in ten countries in Asia. He has been an administrator of the plans operated by the General Conference of Seventh-day Adventists in the United States for ten years.

Rolonda Johnson
Southern Territory Health and Life Plan Coordinator, Risk Management Department
The Salvation Army

Rolonda has been employed with The Salvation Army since 2004 as the Insurance Analyst and in 2007 was promoted to Health and Life Plan Coordinator.

Rabbi Stephen Kahn
Senior Rabbi of Congregation Beth Israel

Rabbi Stephen Kahn was born in San Francisco, California. After receiving his B.A. in Politics from the University of California, Santa Cruz, Rabbi Kahn attended the Hebrew Union College-Jewish Institute of Religion where he was ordained as a rabbi in 1995. He became Senior Rabbi of Congregation Beth Israel in July of 2003.

Rabbi Kahn's passion for Jewish education, youth work and his dedication for creating an inner generational congregation has guided him throughout his years in the rabbinate. He believes that in order to create a "Kehilah Kedosha," – "A Sacred Community," that our members must become fully integrated into all aspects of congregational life. Rabbi Kahn has made personal accessibility and individual connection a critical aspect of his rabbinate.

In addition to his rabbinic duties at the Congregation, Rabbi Kahn is a member on the regional boards of the American Israel Public Affairs Committee (AIPAC) and the Anti Defamation League (ADL).

Marlo Kauffman
Mennonite Church USA

Marlo has worked with Mennonite Retirement Trust (MRT), the Mennonite Church USA pension plan, since 1981. In addition to his duties with MRT, he manages the retirement area for Mennonite Mutual Aid (MMA). MMA offers individual annuities, Traditional and Roth IRAs and TSAs. MMA also offers mutual funds to the general public, and Marlo serves as the operations liaison between MMA and the administrator for the funds. He holds the CLU and FLMI designations. He has also earned the MCRS designation from the National Tax-Sheltered Annuity Association (NTSAA).

James D. Kemper
Partner
Ice Miller, LLP

Jim combines corporate affairs acumen with a background in employee benefits to provide legal advice that makes good business sense. Major employers in the Midwest seek Jim's advice and counsel in creatively designing executive compensation, qualified and nonqualified retirement plans, benefit-related matters in corporate acquisitions and mergers, and ERISA matters.

Luis Maizel
Co-founder
LM Capital Group, LLC

Senior Managing Director and Investment Strategy Group member, is a co-founder of LM Capital Group, LLC and has been investing in the global fixed income market since 1984. Mr. Maizel was born and raised in Mexico City. His experience includes serving as Vice President of Finance for Grupoventas, S.A.; faculty member at the Harvard Business School; and President of Industrial Kuick, S.A. After structuring a favorable buy-out of Kuick, Mr. Maizel relocated to San Diego, California. Mr. Maizel received an undergraduate degree in Industrial Engineering from National University of Mexico in 1971 and Master of Business Administration from Harvard Business School in 1974, where he graduated as a Baker Scholar, the School’s highest academic honor. Mr. Maizel is a board member of: United PanAm Financial Corp. (UPFC), a diversified public financial company, the NAFIN (Mexico’s National Development Company) Foreign Board, Wells Fargo San Diego Community Board, HSBC Private Bank Board of Directors, Chairman of Hispanic National Mortgage Association and several non profit organizations.

Robert W. Maggs, Jr.
President & CEO
The Board of Pensions of the Presbyterian Church (U.S.A.)

In July 1999, Robert W. Maggs, Jr., started his presidency of the Board of Pensions, bringing 27 years experience as an attorney and human resources executive in banking.

He had been corporate human resources director and general counsel at Lincoln First Bank in Rochester, NY. When Lincoln First and Chase Manhattan Corporation merged, he became chief legal advisor to the Chase vice chairman of regional banking, and managing attorney for the corporate legal department.

He served as trustee and elder of the Third Presbyterian Church in Rochester, as personnel committee chair, and on the search committee for its senior pastor. He also served on the personnel committee for the Presbytery of Genesee Valley. When he and his wife, Deborah, moved the Philadelphia area, they joined the Bryn Mawr (PA) Presbyterian Church, where he serves as a trustee and member of the personnel committee.

He was graduated from Claremont McKenna College in Claremont, CA, and received his law degree from the University Of Illinois College Of Law in Champaign-Urbana.

Rev. Catherine Malotky, CRC®
Retirement Planning Manager
ELCA Board of Pensions

Catherine Malotky serves as Retirement Planning Manager for the ELCA Board of Pensions, and has served the Board for eight years. Previously, she was a development editor for the ELCA's publishing arm, Augsburg Fortress Publishers, working in adult Bible study and stewardship. She began ordained ministry as a parish pastor and instructor of homiletics at Luther Theological Seminary, St. Paul, MN. Before attending seminary, she served as a teacher in an LC-MS high school in Chicago.

Paul A. McCulley
Managing Director, PIMCO

Mr. McCulley is a Managing Director, generalist portfolio manager, member of the investment committee and head of PIMCO's Short-Term Desk. He also leads PIMCO's Cyclical Economic Forum and is author of the monthly research publication Global Central Bank Focus. Mr. McCulley joined PIMCO in 1999, previously serving as Chief Economist for the Americas for UBS Warburg. During 1996-98, he was named to six seats on the Institutional Investor All-America Fixed Income Research team. He has twenty-two years of investment experience and holds a bachelor's degree from Grinnell College and an MBA from Columbia University Graduate School of Business. Recently co-authored Your Financial Edge released June 2007.

G. Daniel Miller
Conner & Winters, LLP

G. Daniel Miller is a partner in the Washington, D.C. office of Conner & Winters, LLP, a Tulsa, Oklahoma based law firm, and is a member of that firm's Employee Benefits Practice Group. Mr. Miller graduated from Vanderbilt University in 1971, and received his law degree from the Vanderbilt University School of Law in 1974. Mr. Miller has been practicing in the employee benefits area since graduating from law school.

In addition to serving the employee benefits needs of both large and small for-profit employers, the Employee Benefits Practice Group at Conner & Winters has a national practice serving the deferred compensation planning needs of a variety of non-profit employers. Mr. Miller serves as counsel to around twenty church denominational employee benefit plans and programs and para-church ministries, as well as to other types of non-profit organizations.

In the past, Mr. Miller served as Adjunct Professor at Southern Methodist University School of Law where for three years he taught a course on Taxation of Deferred Compensation. Mr. Miller is a member of the Employee Benefits Committee of the Tax Section of the American Bar Association and serves on the following subcommittees of that committee:

(1) The Subcommittee on Section 403(b), 457 and Exempt Organization Issues (Mr. Miller served as chair of this subcommittee from the Spring of 1989 until August, 1992);

(2) The Subcommittee on State Insurance Regulation of Welfare Plans; and

(3) The Subcommittee on Cafeteria Plans and Flexible Compensation.

Mr. Miller is a Fellow of the American College of Employee Benefits Counsel and is a member of the IRS Mid-Atlantic Pension Liaison Group. Mr. Miller is also a member and past director of the SouthWest Benefits Association.

Robert H. Rydland
Vice President & General Counsel
Board of Pensios of the Evangelical Lutheran Church in America

Robert H. Rydland is Vice President and General Counsel for the Board of Pensions of the Evangelical Lutheran Church in America. Bob serves the Board as legal adviser, supervising legal activities and outside legal counsel. Before joining the Board full time in 1996, Bob represented the Lutheran church in various capacities as a partner with Minneapolis law firm Levander, Zotaley, Vander Linden & Rydland.

James F. Sanft
Executive Vice President and Chief Operating Officer
Concordia Plan Services
The Lutheran Church – Missouri Synod

James F. Sanft began serving Concordia Plan Services (formerly Worker Benefit Plans) in January 1999. Jim has been involved in group insurance and employee benefits for the past 18 years working for both Minnesota Life and more recently for Ameritas Life Insurance Corporation in Lincoln, Nebraska. Jim received his Bachelor's Degree in Education in 1985 from Concordia College, Seward, Nebraska (now Concordia University) and received his Masters Degree in Mathematics and Statistics in 1988 from the University of Nebraska-Lincoln. Jim is both a Fellow of the Society of Actuaries (FSA) and a Member of the American Academy of Actuaries (MAAA).

Jennifer Schoettle
Director of Communications and Public Relations
The Board of Pensions of the Presbyterian Church (U.S.A.)

Jennifer Schoettle has served The Board of Pensions of the Presbyterian Church (U.S.A.) as the Director of Communications and Public Relations since 2005. Before joining the Board she had extensive experience in employee benefits communication and technology at The Vanguard Group, an investment management company in Valley Forge, PA, and CIGNA, a healthcare and related benefits company in Philadelphia, PA. Jennifer graduated from Thiel College, Greenville, PA, with a BA in Business Communication.

Honorable Bill Thomas
Former Congressman and Former Chairman of the House Ways and Means Committee

William Marshall Thomas, commonly known as Bill Thomas, was a Republican member of the United States House of Representatives from 1997 – 2007, representing the 22nd District of California. He last served as the Chairman of the powerful House Ways and Means Committee, and retired to private life at the end of the 109th Congress.

Don L. Walter
Director of Pensions and Benefits USA
Church of the Nazarene

Don Walter serves at the Director of Pensions and Benefits USA for the Church of the Nazarene. He has served in this capacity since 1993, and has served in the Pensions and Benefits office of the Church of the Nazarene since 1983. Prior to serving in the Pensions and Benefits office in the Church of the Nazarene, he was the pastor of a local congregation in Pennsylvania. He also served as adjunct faculty at his alma mater (MidAmerica) over a period of about 12 years. He received his bachelors degree from MidAmerica Nazarene University, a Master of Religious Education degree from Nazarene Theological Seminary in Kansas City, Missouri, and a Master of Arts in Human Resources from Webster University in St. Louis, Missouri. This year Nazarene Bible College in Colorado Springs, Colorado conferred on him the honorary Doctor of Divinity degree. He and his wife, Kathy, have two grown daughters, and two grandchildren.

Kim Walthall
Director, Insurance Product Development
GuideStone Financial Resources of the Southern Baptist Convention

Kim Walthall is the Director of Insurance Product Development at GuideStone Financial Resources of the Southern Baptist Convention. She has been with GuideStone for twelve years and has held positions in accounting, insurance operations and strategic planning.

Kim earned her bachelor of science in accounting from the University of Texas at Dallas. She is a Certified Public Accountant, Certified Employee Benefits Specialist, and a Fellow of the Life Management Institute.

Brother William Walz, FSC
President and CEO, Christian Brothers Services

Brother William Walz, a De La Salle Christian Brother since 1966, has been President and CEO of Christian Brothers Services since 1985. Christian Brothers Services administers cooperative retirement and insurance plans of many organizations and institutions of the Catholic Church in the United States. Prior to joining Christian Brothers Services, he held several teaching and administrative assignments.

He earned a BA degree from St. Ambrose College, an MA degree from Michigan State University, and an MBA degree from Lewis University. As President and CEO of Christian Brothers Services, he leads the senior management team in fulfilling the Lasallian mission and traditions of the organization.

Daniel John Yeary
Pastor, North Phoenix Baptist Church

Dan Yeary has been the pastor of the North Phoenix Baptist Church since August 1, 1993. The church is sixty years old and enjoys the challenge of a multi-generational, multi-cultural ministry in the geographic center of America's 5th largest city. Prior to coming to Phoenix Yeary pastored in Coral Gables, Florida for eighteen years.

Yeary received his B.A. from Hardin-Simmons University in Abilene, Texas in 1961 and his M.R.E. from Southwestern Baptist Theological Seminary in 1965. He also received an honorary Doctor of Divinity from Hardin-Simmons in May 1996.

Yeary has authored several publications including *Make Up Your Mind* and *Direct Access: The Priesthood of the Believer*. He has also written various articles for Homelife Magazine, most recently in 2002.

He is married to Melinda and they have three grown children and three grandchildren.

David H. Zellner
Chief Investment Officer
General Board of Pension and Health Benefits of the United Methodist Church in Evanston, Illinois

Dave Zellner is the Chief Investment Officer for the General Board of Pension and Health Benefits of the United Methodist Church in Evanston, Illinois. The fund currently has $17 Billion in participant assets and provides benefits to approximately 74,000 active and retired lay and clergy employees of The United Methodist Church and its affiliated agencies. Before assuming his current position in 1997, Dave was a Senior Vice President and Director of Operations with Investment Research Company, an investment management affiliate of United Asset Management. Previously, he was Director of Equities for the Shell Oil Company Retirement Funds where he managed two internal investment portfolios. He received his B.S. in Finance from Louisiana State University and MBA from the University of Houston.