

David G. Adams

Vice President of Products and Services, Evangelical Lutheran Church in America

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 Churches

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.

Reverend Holly Vincent Bean

Director of Member Education, The Ministers and Missionaries Benefit Board

The Reverend Holly Vincent Bean has served on the staff of The Ministers and Missionaries Benefit Board (MMBB) since 1986. In 1999 she became director of member education and in 2006 also became corporate secretary to the MMBB Board of Managers. She serves on MMBB's Management Team and oversees the work of the Communications and Education Unit. She conceives and develops educational programs for members and employers on MMBB benefits and related topics. In 1989, Holly earned an M.Div. degree from Union Theological Seminary and was ordained by Judson Memorial Church in New York City. She has been a member of Judson church since 1969 where she has served in numerous leadership positions.

Barbara A. Boigegrain

CBA Board of Directors Chair, General Secretary and CEO, General Board of Pension and Health Benefits of The United Methodist Church

Barbara A. Boigegrain chairs the CBA Board of Directors. Since 1994, Barbara has served The United Methodist Church as general secretary of the General Board of Pension and Health Benefits. This agency is responsible for the general supervision and administration of the retirement, health and welfare benefit plans, programs and funds for more than 74,000 active and retired clergy and lay employees of the Church. As general secretary, Barbara oversees the fiduciary and administrative services of the General Board including management of its multi-billion dollar investment portfolio of assets under management. Prior to joining the General Board, Barbara enjoyed an eleven-year consulting career with Towers Perrin, a global human resources management consulting firm. She established the company's San Diego office in 1990 and managed a broad client base, including many of the area's leading corporations and nonprofit organizations. Earlier in her career, Barbara focused on group insurance benefits with Los Angeles-based Dart Industries and consulted in the KPMG Peat Marwick tax practice.

Caroline Burks

Department Head - Compliance Department, GuideStone Financial Resources

Caroline Burks has worked for GuideStone with 403(b) plans for 25 years. She has headed up the Compliance Department at GuideStone for about 8 years. In that time, the Compliance Department has absorbed the responsibility for production and maintenance of all over the various plan products they offer: nonqualified plans (409A and 457(f) - not-for-profit and for-profit), 401(a)/401(k) plans (ERISA and church plans), 403(b)(9) plans, and 457(b) plans.

Cindy Carlson

Managing Director, Retirement Services for the General Board of Pension and Health Benefits of The United Methodist Church

Cindy Carlson is the Managing Director of Retirement Services for the General Board of Pension and Health Benefits of The United Methodist Church. She is responsible for retirement plan design, policies, and related services. Previously, she was a Principal and senior defined contribution retirement consultant for Mercer Human Resource Consulting.

Candace Cox

Chief Investment Officer, American Baptist Churches (MMBB)

Candace Cox currently serves as MMBB's chief investment officer. In that capacity she is responsible for the investment of nearly \$3 billion in assets across 12 portfolios. Ms. Cox has built a distinguished career managing the investments of major pension funds, the largest of which was Bell Atlantic Asset Management Company, where she served as president and chief investment officer for its \$54 billion in assets. Prior to that, she was principal investment officer with the New York City Comptroller's Office, with responsibility for investing \$46 billion in assets for nine public pension funds. Ms. Cox holds an MBA in finance from NYU and is a member of the Board of Trustees of the American Red Cross National Endowment, sits on the board of RSI Retirement Trust and is a member of the Board of Directors of the National Association of Corporate Directors.

Michael A. Downs

CBA Planning Committee Immediate Past Chair, President and Chief Executive Officer, United Church of Christ 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.

Mike Fallon

Vice president Finance, Board of Pensions of the Presbyterian Church (U.S.A.)

Mike Fallon is the vice president finance for the Board of Pensions of the Presbyterian Church (U.S.A.). He has oversight responsibility for the finance, internal audit, risk and compliance functions. Mike is a Certified Public Accountant and holds a B.S. degree in Accounting from Villanova University. He has led the BOP's enterprise risk assessment efforts since 2002. He has 20 years of experience with the Board of Pensions in various financial roles.

Judith Freyer, CFA

Senior Vice President, treasurer and chief investment officer, Board of Pensions of the Presbyterian Church (U.S.A.)

Judy Freyer is the senior vice president, treasurer and chief investment officer for the Board of Pensions of the Presbyterian Church (U.S.A.) She has investment oversight for the \$7.5 billion in assets that support the defined benefit pension plan and the other plans programs of the denomination. Prior to joining the Board of Pensions in 1988, Judy worked for 12 years at UGI Corporation in finance and investor relations. Judy currently serves as a trustee of the American Red Cross Endowment Board. She is a member of the Executive Board and has chaired the Investment Committee of the Cradle of Liberty Council, Boy Scouts of America since 1991. She is on the Investment Committees of the William Penn Foundation and the Library Company of Philadelphia. Judy received her B.A. from Manhattanville College, M.A. in economic history from the University of Pennsylvania, and M.B.A. from Boston University. She was a Woodrow Wilson Fellow in history and economics.

Steve Gustavson

President, National YMCA Employee Benefits Plan

Steve is the President of the National YMCA Employee Benefits Plan joining the YMCA in 1998. He is responsible for the Health and Welfare plans provided to 350 YMCAs covering 14,000 employees. His work with the National YMCA Employee Benefits Plan began in 1986 as a vendor and continued as a consultant in 1992.

Steve worked with several insurance and managed care organizations beginning in 1977 including Prudential, CIGNA, and United HealthCare in the employee benefits arena. His responsibilities ranged from consulting and business development with health care systems throughout the United States to sales, marketing and account management of employee benefit plans to large employers. His background also includes working in the small group insurance area with Metropolitan Life. This included individual financial and estate planning. Steve received his master's degree from the University of Illinois in Champaign, IL and his BA from Carthage College in Kenosha, WI.

James P. Hamlett

CBA Planning Committee Vice Chair, President , Pension Fund of the Christian Church (Disciples of Christ)

James P. Hamlett serves as President of the Pension Fund of the Christian Church, a position he has held since January 1, 2004. Mr. Hamlett joined the staff of the Pension Fund as Vice-President/President-elect in 2001. Prior to his coming to the Pension Fund, Mr. Hamlett served for more than 28 years on the staff of the Board of Church Extension, most recently as Vice President, Chief Financial Officer and Treasurer. Mr. Hamlett holds a BA in Economics from the University of Kansas, an MBA in Finance from Indiana University and a Chartered Financial Consultant (ChFC) designation from The American College. He is currently pursuing a CFP designation.

Deborah Hassan, CPA

Deloitte and Touche, LLP

Debbie is the Greater Philadelphia Marketplace Leader for the Enterprise Risk Services practice of Deloitte & Touche LLP and the local Women's Initiative Leader. She has more than 27 years of experience at Deloitte & Touche LLP and specializes in delivering internal audit, IT audit, and enterprise risk and control services to clients. Debbie is also the lead client service partner on several Fortune 500 internal audit services clients where she has helped with the development and implementation of Sarbanes-Oxley compliance programs and ongoing sustainability initiatives. In addition to financial, operational and information systems auditing, Debbie has also led a number of enterprise wide risk assessment engagements for global clients and assisted internal audit groups with training and implementation of control self-assessment methodologies. Debbie is a Certified Public Accountant and a member of the Institute of Internal Auditors. She holds a B.A. in accounting and economics from Grove City College. She is an Emeritus Trustee and former treasurer and finance chair of The Pennsylvania Ballet and is a board member of the Women's Business Development Center in Greater Philadelphia.

Jean C. Hemphill

Partner, Business and Finance Department, Ballard Spahr

Jean C. Hemphill is a partner in the Business & Finance Department. She is partner-in-charge of the Health Care Group, and a member of the Employee Benefits and Executive Compensation, and Mergers & Acquisitions/Private Equity Groups. She concentrates her practice in the areas of general corporate, health care, employee benefits, and nonprofit law, representing academic medical centers, medical schools, health systems, physician practice groups, social service agencies, managed care organizations, pension and welfare plans, employers, business groups, and other entities involved in health, retirement and social service issues. Prior to joining Ballard Spahr in 1997, Ms. Hemphill was vice president and general counsel of the Board of Pensions of the Presbyterian Church (U.S.A.), the entity administering the pension, medical, disability, and death benefits plans for the ministers and lay employees of the Presbyterian Church. She continues to serve as general counsel for the Board and legal counsel to numerous other denominational benefits programs. Ms. Hemphill is a director of the National Health Law Project, the President of the Chestnut Hill Community Fund, and Vice Chair and a trustee of the Chestnut Hill Healthcare Transition Corporation. She has served as the Secretary of the Church Benefits Association and the Church Alliance.

Anna G. Hoover

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

Anna Hoover joined the Board in 1999 as vice president, Retirement Benefits. Previously she was at Aon Consulting for 19 years as a pension actuary and consultant.

She earned her B.A. in mathematics and behavioral science from Messiah College, Grantham, PA. Anna is an Enrolled Actuary and a member of the American Academy of Actuaries.

Bradley J. Joern

Director of Health Products, Board of Pensions on the Evangelical Lutheran Church in America

Bradley J. Joern is the director of health products for the Board Pensions of the Evangelical Lutheran Church in America. In this capacity, Brad is responsible for the strategy, design and pricing of the ELCA's health and disability benefits plans.

Brad joined the Board of Pensions in November 2000 as a health actuary. Prior to this, Brad spent 13 years at ReliaStar Life Insurance Company, most recently as vice president and chief actuary of the ReliaStar Reinsurance Group. From 1974 to 1987, Brad was a consultant at Towers Perrin, where he provided assistance in the areas of product design, financial analysis and strategic evaluation to life insurance company management.

Brad received a bachelor's degree in mathematics in 1970 from the University of Nebraska, and a master's degree in biostatistics in 1986 from the School of Public Health at the University of Minnesota. He is a Fellow of the Society of Actuaries and a Member of the American Academy of Actuaries.

In his spare time Brad, who lives in Minneapolis, likes to read, work crossword puzzles and other assorted brain teasers, talk philosophy, and play his guitar.

Del Johnson

Administrator, Seventh-Day Adventist Retirement Plans

Del Johnson is the administrator of the Adventist Retirement Plans and has worked for the Seventh-day Adventist Church in various financial and healthcare roles for 32 years, approximately 15 of those in years in retirement. He has studied retirement and healthcare in 14 countries, having worked for 17 years in Asia.

John G. Kapanke

Church Alliance Chair, President and CEO of the Board of Pensions of the Evangelical Lutheran Church in America

John G. Kapanke was elected to his position in July 1987, prior to the formation of the ELCA Board of Pensions in January 1988. His responsibilities include supervision, direction and active management of the Board of Pensions; articulating and applying the organization's mission, vision and values; development, implementation and administration of the various benefit plans; and developing and implementing a long-term strategic plan.

He is chair of the Church Alliance, a coalition of chief executive officers of church pension and welfare funds, acting on behalf of church benefit programs. The Church Alliance is an ecumenical organization that monitors federal and state legislative and regulatory activities that effect church employee benefit programs. He is also a member of the Executive Committee of the Church Benefits Association, an association of church benefits boards for clergy and church employees.

John serves on the Board of Directors for the Western National Insurance Company, a mutual insurance company providing a wide variety of products and services for both personal and commercial lines of insurance, located in Edina, Minnesota.

He is a member of Mount Olivet Lutheran Church in Minneapolis, where he serves as Vice President and a member of the Church Council; the Finance/Executive Committee; and the Investment Committee of the Mount Olivet Endowment Fund. John is a member of the Board of Directors of the LaCrosse Loggers, a Northwoods League baseball team. He has a bachelor's degree in business administration from the University of Wisconsin at LaCrosse, and holds an honorary doctor of humane letters from Newberry College.

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).

Alan McFarlane

Managing Director, Walter Scott

Alan is the managing director of Walter Scott. He joined the firm in September 2001. Prior to joining Walter Scott, he was the managing director at Global Asset Management's institutional business in London and a director of Ivory & Sime plc in Edinburgh. He holds an MA in politics and modern history from the University of Edinburgh.

G. Daniel Miller

Partner, 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, serves on the Advisory Committee to the IRS TE/GE Commissioner 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.

Brian O'Hare

Employee Benefits and Executive Compensation, Patterson Belknap Webb & Tyler LLP

Bernard ("Brian") O'Hare is a member of the American Bar Association Section of Taxation, Committee on Employee Benefits, where he participates as Chair of the Subcommittee on Qualified Cash and Deferred Arrangements. He has published numerous articles in the employee benefits field and has lectured at the American Bar Association as well as at the Human Resources Association of New York and the New York University School of Continuing Education. In 2002, he was made a fellow of the American College of Employee Benefits (fellowship based upon demonstrating sustained commitment to promoting public awareness and understanding of employee benefits law). He is a member of the New York City firm of Patterson Belknap Webb & Tyler LLP, where he concentrates in the areas of Employee Benefits and Executive Compensation.

Linda Olsen

Vice President of Plan Administration, Concordia Plan Services of The Lutheran Church—Missouri Synod

Linda A. Olsen has been with Concordia Plan Services of The Lutheran Church—Missouri Synod since July 1969. After working in various secretarial positions, she served 15 years as the Executive Assistant to the President, 11 years as the Vice President of Communications, and since 2006 as Vice President of Plan Administration. In her current role, Linda oversees legal and compliance matters, record retention, and staff training. She is a member of Grace Lutheran Chapel in St. Louis, Missouri.

Reverend Dr. Ronald M. Patterson
Senior Minister, Naples United Church of Christ

Reverend Dr. Ronald M. Patterson has been Senior Minister of Naples United Church of Christ since 2004. He is a native of Akron, OH, and received his MDiv from Andover Newton and his doctorate from Eden Theological Seminary. Before coming to Naples he served as an Associate Minister at Marble Collegiate Church in New York City, as Senior Minister of Shiloh UCC in Dayton, OH, and Senior Minister of Mt. Sinai Congregational UCC on Long Island.

Dennis Prager
Former Congressman, CNN Political Analyst, Founder and Partner – Private Equity Firm, Ordained Minister

Dennis Prager is one of America's most widely respected radio talk show hosts, columnists, authors, and speakers. He has been broadcasting 25 years in Los Angeles, and nationally for the last 10. He has lectured in 45 states, nine of Canada's 10 provinces, and on six continents. He is also a Jewish theologian who regularly speaks at both Christian and Jewish institutions and who has recorded over 300 CDs of biblical commentary; and he is an orchestra conductor who has introduced thousands of people to classical music. He has written four books, all of which remain in print and widely read. He is also an expert on happiness – a subject on which he has lectured around the world. Arrangements for Dennis Prager made through B'nai B'rith Lecture Bureau.

Reverend James Rosemergy
Minister, Unity of Fort Myers

Reverend James Rosemergy's first service to Spirit was to pioneer a ministry in Raleigh, NC. Next he and his family were guided to move to the Unity Church of Truth in Spokane, WA where James continued his emphasis on spiritual awakening. From October 2001 to June 2006, he and his wife Nancy were involved once again in pioneering a new Unity ministry, Friends of God Unity Church in Sunrise Beach, MO. James is now serving as minister at Unity of Fort Myers, Florida. James has served the Association of Unity Churches since his ordination. James is the recipient of 2007 Light of God Expressing Award.

Robert H. Rydland
Vice President & General Counsel, Board of Pensions 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. Bob also serves as Treasurer of the Church Alliance and Chairs the Church Alliance Core Lawyer Working Group. 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.

Mitchell J. Smilowitz, CPA
CBA Planning Committee, Chief Operating Officer, Joint Retirement Board for Conservative Judaism

Mitchell J. Smilowitz, CPA, was honored to be selected by the Board of Trustees of *The Joint Retirement Board for Conservative Judaism* to serve as the JRB's Chief Operating Officer. He joined the JRB in June 2006 with over 20 years of experience in pension consulting and retirement planning. Mitch brings extensive experience in pension plan design, compliance, investment analysis and financial planning to the position. He has an MBA and completed the Certified Financial Planning program at New York University. A former contributing editor to *The CPA Journal*, he has authored several articles on 403(b) plans. He also lectures frequently on developing investment strategies for retirement plan assets. He is an active member of the NY State Society of CPAs and serves on the Society's Employee Benefits and Personal Financial Planning Committees. An avid runner and tennis player who enjoys jazz, classical, and Cantorial music, Mitch and his wife, Audrey Sussman, divide their time between the Upper West Side of Manhattan and the Berkshires of western Massachusetts. Mitch and Audrey dote on their 9 nieces and nephews and delight in their two cats and 82-lb Golden Retriever puppy.

David Allen Starr

Principal, Williams & Jensen, PLLC

Mr. Starr's focus is on matters pertaining to ERISA, employee benefits, federal taxation and trade. He has legislative experience representing clients with issues involving title I and title IV of ERISA, tax code rules governing pension and welfare benefit plans, state regulation of multiple employer welfare arrangements, and federal rules governing group health plans.

In 1989, Mr. Starr became an associate at Williams & Jensen. He became a partner of the firm in 1991.

Upon graduation from law school, he became a Legislative Assistant, and later Legislative Director to Senator Howard Metzenbaum (D-OH) focusing on tax and benefit issues. He served as pension counsel to the Senate Labor Subcommittee during the drafting and passage of the Single-Employer Pension Plan Amendments Act of 1986. He was the principal staff member who negotiated bankruptcy law protections for retiree health benefits. He also developed and implemented legislative strategies on a vast array of substantive issues. Jeff Birnbaum in his 1987 book, *Showdown at Gucci Gulch*, describes some of these efforts. Mr. Starr's Senate floor activities even earned public praise from then - Senate Finance Committee Chairman Bob Dole (R-KS) in the Congressional Record.

Mr. Starr has been a faculty member at two ABA sponsored National Institutes on Employee Benefits in Bankruptcy. He has also been a speaker at pension conferences, describing legislative developments that impact benefit programs. Mr. Starr is active in Democratic politics and fundraising. He has participated in Democratic Leadership PACs, steering committees and other political organizations. Mr. Starr graduated from Miami University (Ohio) in 1978, and received his J. D. from the Washington University School of Law (St. Louis, Missouri) in 1981, at age 22. He was a senior editor of the law review, and a member of the Order of the Coif.

Kathy Tunheim

Chief Executive Officer, Tunheim Partners, Inc.

Kathy Tunheim co-founded Tunheim Santrizos Company in 1990 with four colleagues from Honeywell, Inc, and has served as president and chief executive officer throughout the firm's evolution to Tunheim Partners, Inc. With her own areas of specialization in corporate communications and communications strategy, she maintains an active role in many of the agency's client relationships. She is also a well known crisis communications counselor to senior executives, and is honored to have had the opportunity to provide support to clients in their most challenging situations.

Prior to cofounding the agency, she gained experiences in both the corporate world and the political arena that profoundly shaped her approach to creating value as an agency counselor. She worked at Honeywell, Inc. for 10 years, rising to the post of vice president for public relations and internal communications. In that role, she led a global team of professionals with ultimate responsibilities for media relations and employee communications. Earlier in her career, she handled media relations and speechwriting for Wendell R. Anderson – both when he was governor of the State of Minnesota, and during his tenure in the U.S. Senate. Collectively, these experiences cause her to be particularly intrigued by the challenges of helping clients navigate the intersections of business, public policy, and the media.

Kathy grew up in Northfield, Minn., in a family that was bipartisan politically, deeply engaged in community service, and steeped in a passion for football. With brothers who played quarterback, she spent many afternoons “going long” on passing route patterns – experience that she believes not only kept her in shape, but contributed to her fascination with dynamic strategy formulation. With a tentative interest in studying engineering, Kathy attended the University of Minnesota, ultimately choosing to shift her focus into political science. Part of her education was financed by her work as a musician; she regularly appeared in coffeehouses and clubs throughout the Midwest while in college, and continues to enjoy music of every variety.

Shaw B. Wagener, CFA

Director, Capital Group International, Inc.

Shaw B. Wagener is president and a director of Capital Group International, Inc., chairman and a director of Capital International, Inc., and senior vice president of Capital Guardian Trust Company. He is an emerging markets equity portfolio manager and the vice chairman of the Investment Committee for emerging markets. He is also on Capital International's Private Equity Investment Committee. He serves on various business-related committees, including the Global Institutional Group Executive Office and the Capital Group Companies Management Committee. Mr. Wagener joined our organization in 1981 and has also served as the head of equity trading for Capital Research and Management Company. He is a graduate of Claremont McKenna College (cum laude) with a B.A. in international relations. He holds the Chartered Financial Analyst® designation and is a member of the Los Angeles Society of Financial Analysts. He is based in Los Angeles.

William L. Walz, FSC

CBA Planning Committee Chair, Christian Brothers Services

Brother William Walz, a De La Salle Christian Brother since 1966, recently retired as President and CEO of Christian Brothers Services, a position he held 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 was leader of the senior management team in fulfilling the Lasallian mission and traditions of the organization.

J.C. Watts

Former congressman, ordained minister, CNN political analyst and professional athlete

Former congressman, ordained minister, CNN political analyst and professional athlete, J.C. Watts is a visionary statesman whose concerns encompass the health and welfare of people around the world. He is chairman of J.C. Watts Companies, which provide services in communication, business, and public affairs, and his co-chairmanship of the Coalition for AIDS Relief in Africa reflects his concern for global issues such as poverty and health.

David Zellner

Chief Investment Officer, General Board of Pension and Health Benefits of the United Methodist Church

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 approximately \$15 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.