Thank You

for becoming part of this unique opportunity by joining other DFMC members as we gather for our annual conference.
Mindful of our special ministry in the Roman Catholic Church as the extension of the diocesan bishop in fiscal matters, the members of the Diocesan Fiscal Management Conference (DFMC) are united to serve the Church in the ministry of fiscal management.

In particular, this organization:
• Promotes the spiritual growth of its members.
• Encourages the development of professional relationships among members.
• Facilitates the free exchange of ideas and information.
• Provides fiscal and administrative expertise and professional services to the local and national Church.
Welcome back to CHICAGO!

The Archdiocese of Chicago, Cardinal Blase Cupich and I are pleased to welcome you to Chicago, the host city for the 2019 annual Diocesan Fiscal Management Conference this fall (September 29 - October 2) and the beginning of DFMC’s 50th year! The conference will take place at the Hyatt Regency Chicago, located on the riverfront in downtown Chicago. We hope you take time during the conference to enjoy Chicago’s treasures, including the Lake Michigan coastline, our beautiful skyline, our world-class museums, and Millennium Park. We would also recommend visiting some of our historic churches in the downtown area, including Holy Name Cathedral and Old St. Patrick’s Church.

The Archdiocese of Chicago is the 3rd largest archdiocese in the United States and is the spiritual home for more than 2.2 million Catholics. Our 336 parishes celebrate the Eucharist daily in more than 23 different languages. We educate more than 80,000 children in our Catholic schools. Our social services outreach serves, including Catholic Charities, Maryville Academy, Misericordia Home, and Mercy Home for Boys and Girls, more than 1.2 million persons per year.

In the Archdiocese of Chicago, we are exploring a number of inter-related issues in order to better serve the mission of our Church over the long-term. We know other dioceses are exploring these topics, and we look forward to discussing many of these issues during this year’s DFMC. Some of our most relevant issues include:

- Renewing and supporting vibrant Catholic communities across the Archdiocese of Chicago, while engaging the changes that have taken place across these communities since they were formed.
- Enhancing funding for the mission and ministries, and successful stewardship of our financial resources.
- Helping parishes and schools improve their operations and financial stability.
- Building financial organizations and operations to meet today’s and future needs of the Church.

On Sunday September 29, this year’s Conference will commence with a keynote speech by Matt Maher, best-selling musician, singer and Catholic songwriter. Tuesday evening, Mass will be celebrated at Holy Name Cathedral by Chicago’s own Bishop Robert Casey. This year’s Conference is packed with great speakers and subjects, and we thank the DFMC organization for all of their work in planning the conference. We look forward to seeing you in Chicago for spiritual growth and renewal, professional formation, relaxation, and exploration of common issues facing our local churches.

Paul Mannino

ARCHDIOCESE OF CHICAGO
SUNDAY, SEPTEMBER 29

**Sunday liturgy** at local parishes in the Archdiocese of Chicago *(See list of churches on page 15)*

### 9:00 am - 7:00 pm
**Conference Registration**
Grand Registration Desk

*Conference notepads and pens are sponsored through a generous gift from Goldman, Sachs & Co., Atlanta, GA*

### 12:00 noon - 2:00 pm
**Catholic Extension Luncheon Meeting for Extension Mission Dioceses**
Columbus GH

### 3:00 pm - 4:00 pm
**Certified Diocesan Fiscal Manager (“CDFM”) Overview**
Columbus AB

*Ms. Debbie Swisher, CPA, CGA, CDFM, CFO at the Diocese of Lexington*

*Reviewer: Patrick Markey, CPA, MBA*

*(1.2 CPE, Specialized Knowledge - Technical)*

**Learning Objectives:** By the end of the program the participants will
1) Have a greater understanding of the DFMC certification program.
2) Be more familiar with the sixteen topics covered by the CDFM examination and understand their relevance in relation to the duties of a diocesan fiscal officer.
3) Be able to identify and discuss on-line resources available to assist Diocesan Finance Officers.

### 4:00 pm - 5:30 pm
**Internal Audit Forum**
Columbus I-L

*Mr. Don Borisch, English Facilitator*

*Mr. Jorge Montenegro, Spanish Facilitator*

*Reviewer: Patrick Markey, CPA, MBA*

*(1.8 CPE, Auditing – Technical)*

**Learning Objectives:** By the end of the program the participants will
1) Have learned the effectiveness of risk management, control, and governance processes in dioceses.
2) Have a greater comprehension of best practices pertaining to internal auditing techniques currently in use at member dioceses.
3) Have learned how to better relate to the internal audit function in dioceses through dialogue with peers on results, challenges, and experiences.

### 5:30 pm - 6:00 pm
**OPENING RECEPTION**
Grand Foyer South

### 6:00 pm - 8:30 pm
**SESSION I**
Grand A-D North

**WELCOME BANQUET AND KEYNOTE ADDRESS**

*Most Reverend Barry C. Knestout, Episcopal Moderator, Bishop of Richmond*

*Most Reverend Ronald A. Hicks, Auxiliary Bishop of Chicago*

*Keynote: Matt Maher, Award Wining and best-selling Catholic Music Artist*

*Reviewer: Patrick Markey, CPA, MBA*

*(2 CPE, Personal Development - Non-Technical)*

**Best-selling and five time-GRAMMY® nominee musician, singer, and Catholic songwriter Matt Maher is no stranger to songs that connect to the heart of the human condition. He has penned numerous No. 1 hits and performed around the world, including at an intimate meeting with Pope Francis earlier this year. Matt will share his experience of trial, loss, and faith through stories and song. This will be a different kind of keynote but one that will set a relaxing and fun-filled yet inspiring tone for the days ahead.**
Learning Objectives: By the end of the program the participants will
1) Understand better how we come closer to God by seeing His work in our lives.
2) Understand the mysterious role of difficulty and struggles in living Christian life.
3) Be inspired to work together for a stronger and more vital Church.

The opening reception and banquet are for DFMC members and their guests only (not including professional partner firms’ representatives).

This session is made possible in part through a generous gift from Christian Brothers Investment Services, Inc., New York, NY.

MONDAY, SEPTEMBER 30

7:00 am - 7:30 am Sacrament of Reconciliation Grand Suite 2
7:00 am - 4:00 pm For prayer and adoration, attendees are invited to visit the chapel at the Hyatt Regency Chicago Grand Suite 3
7:00 am - 5:00 pm Late Registration/Information Grand Registration Desk
7:30 am - 8:15 am Mass at the Hyatt Regency Chicago, celebrated by Most Rev. Barry C. Knestout, Bishop of Richmond and DFMC Episcopal Moderator Columbus C-F
8:30 am - 9:30 am Breakfast Columbus G-L

SESSION II - GENERAL SESSION Grand A-D North

Recovery and Reform: Toward a Culture of Accountability, CoResponsibility and Transparency
Ms. Kerry Robinson, Global Ambassador and former president of the Catholic Leadership Roundtable for Church Management
Reviewer: Ms. Laura Clark, CDFM (1.2 CPE, Regulatory Ethics – Non-Technical)

The Catholic Church in the U.S. is confronting twin crises: sexual abuse of minors and vulnerable adults and a crisis of distrust of leadership. These crises offer an opportunity of transformation however: to create a new culture of servant leadership and management practices and a new partnership between the laity, religious and ordained members of the Church in co-responsibility. Restoring trust requires cultural change based on transparency, accountability, competency and justice. In what concrete ways can we be part of the solution? Where are there signs of hope?

Learning Objectives: By the end of this program participants will
1) Be inspired in their vocation to be co-responsible for the Church.
2) Be reminded of how crucially important the role of laity is in the mission of the Church.
3) Explore ways to respond to the sexual abuse crisis and restore trust.
4) Be encouraged by partnerships and initiatives that advance financial health for the Church.
5) Find renewed hope and commitment to practices of accountability and transparency.

This session is made possible in part through a generous gift from Notre Dame Federal Credit Union, Notre Dame, IN

10:30 am - 11:00 am Beverage Break Grand Foyer

This break is made possible in part through a generous gift from Grant Thornton, LLP Chicago, IL.
SESSION III - GENERAL SESSION

**Going, Going, Gone … the Dynamics of Disaffiliation in Young Catholics**

Dr. Robert J. McCarty, D.Min., Pastoral Consultant
Reviewer: Ms. Susan Clifton, CPA

(1.2 CPE, Specialized Knowledge – Technical)

In their 2015-2017 study, the *Dynamics of Disaffiliation in Young Catholics*, Saint Mary’s Press describes extensive research on young Catholics who have left the Church. Using both quantitative and qualitative assessments the research identifies common antecedents in the disaffiliation process, the myriad reasons young people choose to leave the faith community, and where they go, if anywhere. The disaffiliated provide a window into broader cultural trends that impact the development of a religious identity in a secular age. This session will examine the Catholic religious landscape and the implications for the continued pastoral and financial viability of our parishes. And we will hear from young Catholics, in their own words and in their own voices, about their connection to the Catholic community.

**Learning Objectives:** By the end of this program participants will
1) Understand the five foundational hungers that drive young people today.
2) Identify the six common antecedents leading to disaffiliation.
3) Situate disaffiliation in young Catholics within the broader secular context.
4) Understand that disaffiliation is not a “youth problem” but rather a faith community challenge.
5) Consider the implications for sustaining parish viability.

12:00 pm - 1:00 pm

**Lunch**

_Columbus G-L_

This Luncheon is made possible in part through a generous gift from Diamond Hill Capital Management, Columbus, OH.

1:00 pm - 2:00 pm

**Open Exhibit Hall**

_Dessert Reception with Exhibitors_

_Grand CD South, EF_

1:00 pm - 6:30 pm

**Exhibit Hall**

_Grand CD South, EF_

SESSION IV - CONCURRENT SESSIONS M-1

**A. Trends in Church and Society: A Discussion with Catholic Charities on How to Be Engaged as Problem Solvers**

Mr. Brian R. Corbin, Executive Vice President of Member Services, Catholic Charities USA
Reviewer: Ms. Tammy DiLorenzo, CPA

(1.2 CPE, Specialized Knowledge - Technical)

Over the past 109 years, national Catholic Charities USA continues to analyze data and trends impacting the Church and society regarding service needs, family structure and community development utilizing the lens of Catholic social teaching with an eye towards racial and socioeconomic equity. This session will explore some trends impacting us and discuss the strategic priorities of Catholic Charities agencies (affordable housing, integrated health and nutrition, immigration and refugees, Catholic leadership and formation, social enterprises, disaster response, and social policy analysis and advocacy). Various case studies will be shared to provide insights on how Diocesan Officials can marshal resources in cooperation with their local Catholic Charities agencies to enhance integral human development.

**Learning Objectives:** By the end of this program participants will
1) Understand the role of Catholic Charities agencies as, in Pope Benedict XVI’s words, an “inseparable” element of the Church (Deus Caritas Est, 25).
2) Be able to analyze national trends in the socio-economic-political realm that impact their local work and organizations.
3) Understand how to apply an equity lens based in Catholic social doctrine to better organize resources to improve their local communities.
4) Know how to better extrapolate insights from case studies to apply to local circumstances.
B. Reputation Management in the Age of Outrage
Mr. Christopher J. Lukach, APR, President, AKCG – Public Relations Counselors
Reviewer: Mr. Timothy Thomas
(1.2 CPE, Communications and Marketing – Non-Technical)

Today’s diocesan communicators face more than an onslaught of “fake news” – they face an epidemic of shrinking attention spans coupled with recreational outrage. This reality makes both social and traditional media hotbeds for new forms of reputational crises. While crises cannot always be prevented, they can be anticipated. Those dioceses most successful in weathering crises are those that recognize and prepare – practically – for the realities and immediacy of today’s communications landscape.

Learning Objectives: By the end of this program participants will
1) Understand the changing media landscape and its impact on their diocese.
2) Understand the pros and cons of various forms of communications.
3) Understand the difference between “winning” in the courts of law and public opinion.
4) Know how to distinguish between various forms of causes and issues.
5) Learn actionable steps for improving communications during challenging times.

C. Preserve and Protect Endowment Assets for Today, Tomorrow and Forever
Ms. Suzanne Nunn, Interim CEO & Planned Giving Professional, Orange Catholic Foundation
Reviewer: Mr. Anthony Rabago, MBA
(1.2 CPE, Finance – Technical)

Endowment building is a critical component of sustainable funding and provides an additional means to respond to the increased financial stress your diocese may be experiencing. This session will include considerations for an analysis of potential claims against endowment assets or holdings. It will identify vulnerabilities and steps to preserve and protect the endowment assets with lessons from a recent canon and civil law review of a Catholic foundation. Additional subjects will include defining various types of endowments; endowment policies; investment and financial objectives; gift acceptance, spending and investment policies; asset structure; portfolio managers and endowment agreements.

Learning Objectives: By the end of this program participants will
1) Be able to define endowments and each aspect of an endowment Fund.
2) Know how to identify vulnerabilities in endowments and learn steps to preserve and protect the endowment assets.
3) Better comprehend endowment fund agreements and policies.
4) Have an understanding of policies and guideline for endowment management, investing, and spending.
5) Be able to identify endowment committee structures and characteristics.

3:00 pm - 3:30 pm
Beverage Break with Exhibitors

3:30 pm - 4:30 pm
SESSION V - CONCURRENT SESSIONS M-2

A. Trends in Church and Society: A Discussion with Catholic Charities on How to Be Engaged as Problem Solvers
Mr. Brian R. Corbin, Executive Vice President of Member Services, Catholic Charities USA

B. Reputation Management in the Age of Outrage
Mr. Christopher J. Lukach, APR, President, AKCG – Public Relations Counselors

C. Preserve and Protect Endowment Assets for Today, Tomorrow and Forever
Ms. Suzanne Nunn, Interim CEO & Planned Giving Professional, Orange Catholic Foundation

4:30 pm - 6:30 pm
Reception with Exhibitors

Evening Free
TUESDAY, OCTOBER 1

7:00 am - 7:30 am  Sacrament of Reconciliation  Grand Suite 2
7:00 am - 4:00 pm  For prayer and adoration, attendees are invited to visit the chapel at the Hyatt Regency Chicago
7:00 am - 5:00 pm  Late Registration/Information  Grand Registration Desk
7:00 am - 8:30 am  Breakfast  Columbus G-L  
   This Breakfast is sponsored through a generous gift from Baird Funds, Milwaukee, WI.

7:00 am - 8:30 am  Coffee Talk with Exhibitors (coffee and pastries in Exhibit Hall)  Grand CD South, EF
7:00 am - 2:00 pm  Exhibits  Grand CD South, EF
8:30 am - 9:30 am  SESSION VI - GENERAL SESSION
Enterprise Risk Management: Integrating with Strategy and Performance  Grand A-D North
Mr. Paul J. Sobel, CIA, QIAL, CRMA, Vice President/Chief Risk Officer for Georgia-Pacific, LLC and Chairman of the Committee of Sponsoring Organizations of the Treadway Commission (COSO)
Reviewer: Ms. Sheila Murray, CPA, MBA, CDFM
(1.2 CPE, Management Services – Technical)
Organizations of all types and sizes must deal with uncertainty in an ever-changing world. Enterprise Risk Management (ERM) provides a keyway to understand and deal with that uncertainty. The Committee of Sponsoring Organizations of the Treadway Commission (COSO), best known for its Internal Control – Integrated Framework, has also published and updated an ERM framework, the latest version titled “Enterprise Risk Management: Integrating with Strategy and Performance.” This framework has applicability to all organizations, with elements that are relevant to both large and small diocese. Paul Sobel, the Chairman of COSO and Chief Risk Officer of Georgia-Pacific in Atlanta, will provide an overview of COSO’s ERM framework. Having also served on an Atlanta Archdiocese Budget and Operations Committee, he will provide insights into how this framework can help diocesan financial managers leverage the framework in their day-to-day jobs.

Learning Objectives:
1) Understand the COSO ERM framework.
2) Relate the ERM components and principles to diocesan areas of focus.
3) Learn how ERM can be an integral part of strategic planning.
4) Understand the importance of establishing a strong risk and control culture.
5) Begin thinking about how to embrace risk thinking in their diocese.

This session is made possible in part through a generous gift from Burke, Warren, MacKay & Serritella, P.C., Chicago, IL.

9:30 am - 10:30 am  Beverage Break with Exhibitors  Grand CD South, EF

10:30 am - 11:30 am  SESSION VII - GENERAL SESSION
The Captive Insurance Company: What It Is and How It Can Add Value to a Diocesan Insurance Program  Grand A-D North
Mr. Frank Napolitano, Director of Risk Management and Insurance Services, Archdiocese of New York and Mr. James Evans, Jr., Principal Consultant, Albert Risk Management Consultants
Reviewer: Mr. Anthony Rabago, MBA
(1.2 CPE, Specialized Knowledge - Technical)
A captive insurance company is a corporate vehicle that allows its parent to effectively retain and manage insurable risk while retaining control of premiums and costs. Thousands of corporations, including several diocesan corporations, manage their risk through a captive insurance vehicle and derive a significant financial and risk-financing benefit from doing so. Your
(arch)diocese may benefit from organizing and managing a captive insurance company. There are certain regulatory and financial requirements for operating a captive insurance company and whether your diocese can benefit from managing its risk through such a vehicle will depend on several factors. This session will explore what a captive insurance company is, the steps to formation, whether it is an option for your diocese to consider in financing its risks, the possible strategic advantages as part of a diocesan risk and insurance program and the unique challenges of operating a diocesan captive.

**Learning Objectives:** By the end of this program participants will

1) Know what a captive insurance company is and isn’t.
2) Understand what resources and costs are required to operate a captive insurance company.
3) Know the possible risk financing strategies that benefit an (arch)diocese available through a captive insurance vehicle.
4) Understand how to incorporate a captive insurance company into the overall (arch)diocesan insurance program and how it can be tailored to meet a diocese’s insurance needs.
5) Realize the critical determinants for a successful diocesan captive insurance company.
6) Understand the potential operational and financial challenges and opportunities in a diocesan setting.

11:30 am - 2:00 pm
**Lunch, Time with Exhibitors and Raffle in Exhibit Hall**

This luncheon is sponsored through a generous gift from USI Consulting, Glastonbury, CT.

2:00 pm
Exhibits close and move out

2:00 pm - 3:00 pm
**SESSION VIII - CONCURRENT SESSIONS T-1**

**A. How to Prepare Your Diocese for a Sea of Data Security Threats**

Mr. Keith Moulsdale, Partner at Whiteford, Taylor, Preston
Reviewer: Ms. Tammy DiLorenzo, CPA
(1.2 CPE, Informative Technology - Technical)

There are many risks to be aware of in the day-to-day operations in a diocesan chancery. One up-and-coming, and possibly all consuming, has to do with IT and data security. Since accounting and payroll systems rely more and more on IT security, this is an ever-greater concern. What should be done to prepare for data breaches and losses? And when a data breach happens, what steps are needed to mitigate risk and recover. This session will explore these questions and explain must do action steps as well as must avoid mistakes.

**Learning Objectives:** By the end of this program participants will

1) Understand trends in data security breach methods and be able to link strategic planning and succession planning.
2) Appreciate the complexity of data privacy + security laws, including understanding the key components of the succession planning process.
3) Recognize the scope and scale of data privacy/security breach costs and fines.
4) Have a ten-step plan to address privacy/data security risks.
5) Know how to respond to privacy/data security incidents.

**B. Serving Parish and School Financial Needs ... From Direct Service, to Consulting and Everything in Between**

Ms. Ashley Conley, Director of School Finance, Archdiocese of Baltimore and
Ms. Catherine Favre, Director of Multi-Parish/School Accounting, Diocese of Beaumont
Reviewer: Mr. William Biggs, CPA
(1.2 CPE, Accounting -Technical)

This session will explore the successes, failures, and lessons learned from diocesan sponsored accounting services for Parishes and Schools. The presentation will give participants the knowledge of different experiences at different size dioceses and the ability to use that knowledge in making decisions about their own existing programs or beginning a new one. Participants will leave with a better understanding for the need for administrative and financial support as a ministry within the diocesan administrative office. This is especially important as federal and state laws become more complex and reporting more involved and complicated.
Learning Objectives: By the end of this program participants will
1) Know what the diocese has to have in place to start an accounting service.
2) Know where to begin in starting an accounting service.
3) Know what type of staff the service program will need.
4) Understand some of the issues that the staff will encounter at the parish/school.
5) Have a better understanding of what financial and administrative support the program will need from diocesan administration.

C. Contingency Planning for the Church in Today’s Crisis
Ms. Sheila Murray, CFO and Mr. Matt Haverstick, General Counsel, Diocese of Greensburg
Reviewer: Mr. Kevin Kiley, CDFM
(1.2 CPE, Business Management & Organization – Non-Technical)

The current situation in the Church can create an uncertain future for temporal goods and their administration. What can we learn from past challenges and what should we do to prepare for what may come? This session will offer insights from dioceses that have already taken up some of these challenges, explaining how they faced them as well as the lessons learned along the way. It will explore things like the governance structure to put in place to try and protect temporal assets, coordination of potential insurance coverage based on claim dates, how potential funding structures were created and administered, and the course of obtaining proper approvals from the applicable boards and Rome. It will also explore outreach efforts to survivors and the civil and canonical law pitfalls to watch out for.

Learning Objectives: By the end of this program participants will
1) Have learned important insights from dioceses that have already gone through the financial and administrative impacts of the current crisis including lessons learned along the way.
2) Go back to dioceses with ideas of the governance structure to put in place to try and protect temporal assets and the course of obtaining proper approvals from the applicable boards & Rome.
3) Understand how to coordinate potential insurance coverage based on claim dates and how potential funding structures can be created and administered.
4) Have learned from outreach efforts to survivors and the civil and canonical law pitfalls to watch out for.

3:00 pm - 3:30 pm
Beverage Break
Columbus Foyer
This Break is made possible in part through a generous gift from Mesirow Financial, Chicago, IL.

3:30 pm - 4:30 pm
SESSION IX - CONCURRENT SESSIONS T-2
A. How to Prepare Your Diocese for a Sea of Data Security Threats
Mr. Keith Moulsdale, Partner at Whiteford, Taylor, Preston
Columbus AB

B. Serving Parish and School Financial Needs … From Direct Service, to Consulting and Everything in Between
Ms. Ashley Conley, Director of School Finance, Archdiocese of Baltimore and Ms. Catherine Favre, Director of Multi-Parish/School Accounting, Diocese of Beaumont
Columbus CD

C. Contingency Planning for the Church in Today’s Crisis
Ms. Sheila Murray, CFO and Mr. Matt Haverstick, General Counsel, Diocese of Greensburg
Columbus EF

5:30 pm - 6:30 pm
Mass at Old St. Patrick’s Catholic Church
Meet the bus at the West Tower Lobby (4:30-5pm)
Presider and Homilist - Most Reverend Robert G. Casey, Auxiliary Bishop of Chicago

Evening Free
## DFMC 2019 PROGRAM

### WEDNESDAY, OCTOBER 2

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Location</th>
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<tbody>
<tr>
<td>7:00 am - 7:30 am</td>
<td>Sacrament of Reconciliation at Hyatt Regency Chicago</td>
<td>Grand Suite 2</td>
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<tr>
<td>7:00 am - 2:00 pm</td>
<td>For prayer and adoration, attendees are invited to visit the chapel at Hyatt Regency Chicago</td>
<td>Grand Suite 3</td>
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<tr>
<td>7:30 am - 8:30 am</td>
<td>Mass at Hyatt Regency Chicago</td>
<td>Columbus C-F</td>
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<tr>
<td>8:00 am - 4:00 pm</td>
<td>Late Registration/Information</td>
<td>Grand Registration Desk</td>
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<tr>
<td>8:30 am - 9:30 am</td>
<td>Breakfast</td>
<td>Grand EF</td>
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**This Breakfast is sponsored through a generous gift from the Catholic Cemetery Conference, Hillside, IL.**

### SESSION X - CONCURRENT SESSIONS W-1

#### A. Good Stewards Are Great Fiduciaries: How to Protect Your Diocese from 403(b) Litigation

Mr. Jim Ceplecha, Managing Director of Christian Brothers Retirement Planning Services and Mr. Todd Timmerman, CFS, CEBS, AlF®, Managing Director RPA Financial, LLC

Reviewer: Ms. Tammy DiLorenzo, CPA

(1.2 CPE, Specialized Knowledge – Technical)

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.

**Learning Objectives:** By the end of this program participants will

1) Understand the role of Diocesan leaders as a fiduciary.
2) Recognize the expectation of committee members on ensuring fees are reasonable.
3) Review 403(b) plan lawsuits - what organizations did to win, what organizations did to cause large settlements.
4) Know what documentation provides the most protection from litigation.
5) Learn whether an open-architecture or a turnkey approach is the best path.

#### B. Finance and Philanthropy: Putting the Pieces Together

Mr. Walt Coughlin, Executive Vice President at Coughlin & Co., and Mr. Michael Schierl, Senior Partner of Julius Capital

Reviewer: Ms. Susan Clifton, CPA

(1.2 CPE, Finance – Technical)

Catholic Dioceses often face challenges accessing the “full vision funding” necessary to commence and timely complete (i) priority new construction projects and (ii) desperate needed improvements to existing, older buildings. Priority new construction projects are oftentimes cut in half, delayed or abandoned altogether due to a perceived lack of financing options which give credit to expected future cashflow from pledges receivable and in-process capital campaigns. Desperately needed maintenance and retrofit projects are oftentimes delayed or abandoned altogether due to a perceived lack of available financing and philanthropic funding options. This presentation will describe and illustrate several innovative financing methods that Diocesan Financial Partners are currently using to help forward-thinking Dioceses obtain full vision funding for their priority new construction and maintenance/retrofit projects. We will use practical case studies of several recent transactions to illustrate how the various funding innovations are being successfully employed in the field.
Learning Objectives: By the end of this program participants will
1) Know how to solve funding shortfalls with funding solutions that integrate finance and philanthropy.
2) Be able to start new construction projects on time by getting credit from lenders for expected cashflow from pledges receivable and in-process capital campaigns.
3) Understand how to utilize C-Pace financing to fund new construction and maintenance/retrofit capital projects.
4) Know how to maximize borrowing capacity and minimize annual debt service payments by combining shorter-term bank debt and longer-term public bonds (taxable or tax-exempt) under a single evergreen credit facility.
5) Be able to utilize balance sheet philanthropy to obtain structured and planned gifts from within your local “Catholic Financial Ecosystem.”

C. Funding the Mission – Expanding the Vision
Ms. Joanie Lewis, OSV Appeals and Campaigns Account Executive
Reviewer: Mr. Kevin Kiley, CDFM
(1.2 CPE, Management Services – Technical)

In the Catholic Church, we do not do a good job of defining the word Mission. Parishioners are largely disconnected with understanding how their offertory gift funds not just parish operations but allows the church to provide ministries and services to serve God’s people, spread the Gospel, and make disciples. Funding the mission is the first step in being able to advance the parish. Without a clear Vision Plan, the parish is largely on autopilot and reactionary to the liturgical calendar. No clear plan for growth, involvement, or formation is in place to guide us in a direction for moving forward. In this session, the attendees will gain an understanding of the importance of connecting mission to vision and how financial support is critical in advancing the Catholic Church. This discussion will unite parish mission and vision to parishioner generosity thus allowing the church to work abundantly versus from a place of limited resources.

Learning Objectives: By the end of this program participants will
1) Understand the need to ask for money in the Catholic Church.
2) Be able assist leadership in defining the mission of the Church to their community.
3) Understand the need for a clear vision plan.
4) Have tools for funding the mission plus tools for creating the vision plan.
5) Have reviewed actual examples of parishes who have increased offertory revenue, tied mission to an established vision plan.

D. Killing the Golden Goose: The Perpetual Care Issues of Catholic Cemeteries
Mr. Robert Seelig, Chief Executive Officer of Catholic Funeral and Cemetery Services
Reviewer: Mr. Robert Ash, MBA
(1.2 CPE, Specialized Knowledge – Technical)

In this session Catholic Funeral and Cemetery Services (CFCS) will discuss how to improve investment of diocesan resources into properly structured capital funds. In the process, attendees will come away with a better understanding of the Catholic cemetery market, associated capital funds, and how to make overall improvements to diocesan cemeteries.

Learning Objectives: By the end of this program participants will
1) Understand the Catholic cemetery market.
2) Have a greater understanding of some key trends in capital needs for the Church.
3) Understand the CFCS Capital Fund.
4) Understand how to improve diocesan cemeteries.

10:30 am - 11:00 am Beverage Break

This break is sponsored through a generous gift from FloQast, Sherman Oaks, CA
SESSION XI - CONCURRENT SESSIONS W-2

A. Good Stewards Are Great Fiduciaries: How to Protect Your Diocese from 403(b) Litigation

Mr. Jim Ceplecha, Managing Director of Christian Brothers Retirement Planning Services and Mr. Todd Timmerman, CFS, CEBS, AIF®, Managing Director RPA Financial, LLC

Columbus AB

B. Finance and Philanthropy: Putting the Pieces Together

Mr. Walt Coughlin, Executive Vice President at Coughlin & Co., and Mr. Michael Schierl, Senior Partner of Julius Capital

Columbus GH

C. Funding the Mission – Expanding the Vision

Ms. Joanie Lewis, OSV Appeals and Campaigns Account Executive

Columbus IJ

D. Killing the Golden Goose: The Perpetual Care Issues of Catholic Cemeteries

Mr. Robert Seelig, Chief Executive Officer of Catholic Funeral and Cemetery Services

Columbus KL

SESSION XII - MEMBERSHIP BUSINESS LUNCH WITH SPECIAL GUEST SPEAKER

Living as a Missionary Disciple

Archbishop Borys Gudziak, Ph.D., Metropolitan Archbishop of Philadelphia of the Ukrainian Greek Catholic Church

Reviewer: Patrick Markey, CPA, MBA

(1.8 CPE, Personal Development – Non-Technical)

During this luncheon, after the DFMC Business Meeting, Archbishop Borys Gudziak will share his inspiring journey of faith.

Learning Objectives: By the end of this program participants will
1) Know DFMC activities, developments and future plans.
2) Have assessed the implementation of the Strategic Plan & review the staff Operational Plan.
3) Have elected new board members.
4) Have experienced DFMC membership development, focusing on roles & responsibilities.
5) Have a better understanding of effectively evangelizing in today’s world.

This business luncheon is made possible in part through a generous gift from ADP, Elk Grove, IL.

SESSION XIII - GENERAL SESSION

Maintaining a Culture of Integrity Amid Scandal and Sorrow

Ms. Kathleen McChesney, Ph.D., CEO of Kinsale Management Consulting

Reviewer: Mr. Kevin Kiley, CDFM

(1.2 CPE, Behavioral Ethics – Non-technical)

Dr. McChesney will share her experiences and lessons learned in her previous roles as the first Executive Director of the Office of Child Protection of the US Bishops’ Conference and Chair of the National Advisory Council of the Conference of Major Superiors of Men with regard to the impact of sexual abuse by Catholic clergy and the resulting distrust of Catholic hierarchy in the United States. This session will provide participants with a greater understanding of the manifestations and causes of distrust of the Catholic hierarchy and will suggest actions necessary to “Maintain a Culture of Integrity” amidst the tragic circumstances of abuse of minor and vulnerable adults within Catholic ministries.

Learning Objectives: By the end of this program participants will
1) Have a greater understanding of the manifestations of distrust of the Catholic hierarchy in the United States.
2) Have a greater understanding of the causes of distrust of the Catholic hierarchy in the United States with regard to matters of sexual abuse.
3) Have a reinforced understanding of the importance of maintaining a “Culture of Integrity” with regard to stewardship.
4) Be able to identify ways to “Maintain a Culture of Integrity” amid scandal and sorrow.
SESSION XIII - GENERAL SESSION continued  
Grand A-D North

This session is made possible in part through a generous gift from The National Catholic Risk Retention Group, Inc., Lisle, IL.

3:00 pm - 3:30 pm  
Beverage Break  
Grand Foyer

This break is made possible in part through a generous gift from the Catholic Order of Foresters, Naperville, IL.

SESSION XIV - GENERAL SESSION  
Grand A-D North

Who Will Be the Next You .... Succession Planning
Ms. Nanette Lowe, Director of Human Resources
Dn. Eric Simontis CFO for the Archdiocese of Washington
Reviewer: Mr. Kevin Kiley, CDFM
(1.2 CPE, Personnel/Human Resources – Non-Technical)

Creating a culture where strategic succession planning is a priority starts with the leadership of an organization, however, the development and implementation of a plan that is operational and aligned with the strategic vision of the organization is a collaborative effort between leadership and Human Resources. This session will explore the necessary components and rationale for succession planning in order to provide you with helpful tools and information that will allow you to successfully partner with Human Resources in the development and implementation of an effective succession plan that identifies and fosters the next generation of leaders for your organization.

Learning Objectives: By the end of this program participants will
1) Understand why to engage in succession planning.
2) Have learned how to better engage and partner with HR on succession planning.
3) Understand the key components of the succession planning process.
4) Understand key success factors to effective succession planning for the Diocese/Archdiocese.

4:30 pm - 5:30 pm  
Closing Reception and Awards  
Grand EF

The closing reception and awards is made possible in part through a generous gift from Richard P. Garrigan & Associates, Omaha, NE.

THURSDAY, OCTOBER 3

8:00 am - 5:00 pm  
Accounting Practices Committee  
Columbus G

The annual meeting internet service is made possible in part through a generous gift from PRIMEPAY, West Chester, PA.
Sunday Liturgy will be at local parishes in the Archdiocese of Chicago

LOCAL CHURCHES TO CONSIDER
(Mass times subject to change, please check churches before attending):

ASSUMPTION
www.assumption-chgo.org
323 W. Illinois St., Chicago IL 60654
Saturday: 5:00 pm
Sunday: 7:30 am, 9:00 am, 10:30 am, 12:15 pm

HOLY NAME CATHEDRAL
www.holynamecathedral.org
730 N. Wabash Ave., Chicago IL 60611-2514
Saturday: 5:15 pm, 7:30 pm
Sunday: 7:00, 8:15, 9:30, 11:00 am; 12:30

ST. PETER’S IN THE LOOP
www.stpetersloop.org
110 W. Madison Street Chicago, IL 60602
Saturday: 5:00 pm
Sunday: 9:00 am, 11:00 am, 12:30 pm

IMMACULATE CONCEPTION
www.icsparish.org
1434 N. North Park Ave., Chicago, IL 60610
Saturday: 5:00 pm
Sunday: 9:30 am and 12:30 pm

ST. JOSEPH PARISH
www.icsparish.org
1107 N. Orleans St., Chicago IL 60610-2511
Sunday: 8:00 am and 11:00 am

OLD ST. PATRICK’S
www.oldstpat.org
700 W. Adams St., Chicago IL 60661
Sunday: 7:00 am, 8:00 am, 9:30 am, 11:15 am

ST. JOHN CANTIUS
www.cantius.org
825 N. Carpenter St., Chicago IL 60642
Saturday: 5:00 pm (Ordinary Form of the Mass—English)
Sunday: 7:30 am (Extraordinary Form of the Mass—Tridentine Low Mass in Latin);
9:00 am (Ordinary Form of the Mass—English);
11:00 am (Ordinary Form of the Mass—Latin);
12:30 pm (Extraordinary Form of the Mass—Tridentine High Mass in Latin)

SANTA MARIA ADDOLORATA
www.smacatholicchurch.com
528 N. Ada St., Chicago IL 60642
Saturday: 5:30 pm (English)
Sunday: 9:00 am (English); 10:30 am (Spanish); 12:30 pm (Spanish)

HOLY INNOCENTS
https://holyinnocentsparish.org
743 N. Armour St., Chicago IL 60642-5255
Saturday: 7:45 am (English); 9:00 am (Spanish); 10:30 am (Polish);
12:00 pm (English); 1:30 pm (Spanish)

HOLY TRINITY POLISH MISSION
www.trojcowo.com
1118 N. Noble St., Chicago IL 60642
Saturday: 6:30 pm (Polish)
Sunday: 8:00 am (Polish); 10:00 am (Polish); 12:15 pm (Polish)
The Diocesan Fiscal Management Conference (DFMC) is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of the continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org.

**NASBA APPROVES DFMC AS CPE SPONSOR**

The DFMC is an approved sponsor on the National Registry of CPE Sponsors. The Registry is a program developed by the National Association of State Boards of Accountancy (NASBA) to recognize sponsors for their ability to meet nationally accepted standards for continuing professional education.

To become registered, a sponsor must undergo a comprehensive review of its methods of course presentation, measurement, development and reporting. As a registered sponsor, the DFMC has demonstrated its ability to meet the standards for CPE that have been established for the accounting profession, as well as its commitment to a national system that promotes the delivery of high quality continuing professional education nationwide.

The Conference will be available for up to 21.6 hours of credit as a Group-Live offering. There are no prerequisites and/or advanced preparation required for these courses other than working for a diocesan accounting and finance office or in diocesan leadership. The courses are offered as updates. The objectives for each presentation are listed in the formal program for each individual session. For more information regarding administrative policies, such as complaint and refund, please contact our office at 4727 E. Bell Road, Ste. 45-358, Phoenix, AZ 85032 (602-992-2900).

To submit completed CPE hours, please go to www.dfmconf.org/cpe or scan the QR code. On the CPE Completion Form, please only select the sessions that you attended in their entirety. Note that a maximum of 2 concurrent sessions are available per day.
FEATURED SPEAKERS

MATT MAHER  Session I - Welcome Banquet & Keynote Address

Since his 2008 major label debut, Matt Maher has become a staple in the artistic and songwriting community. A nine time-GRAMMY® nominee and three time-GMA Dove Award winner, he has garnered multiple radio successes, writing and recording songs such as his Top 5 CCLI song “Lord, I Need You” and the chart-topping radio single “Because He Lives (Amen).” Along with other hits such as “Hold Us Together,” “Christ Is Risen,” “All The People Said Amen,” and “Your Grace Is Enough,” Maher has written / co-written five No. 1 radio singles. Penning numerous songs recorded by Chris Tomlin, Crowder, Third Day, Jeremy Camp, Matt Redman, Hillsong, Casting Crowns, Meredith Andrews, Jesus Culture, Jars of Clay, and Passion, he’s had multiple titles on the CCLI chart’s Top 500 list. With career album sales of more than 550,000 units to date, Maher was awarded his first RIAA Gold certification for his popular single “Lord, I Need You” in 2015. He’s released nine studio albums, including his 2017 GRAMMY-nominated album Echoes. He released his first Christmas album and children’s book, both titled The Advent of Christmas, during the 2018 holiday season.

Matt Maher achieved a career highlight in 2013 when he performed for Pope Francis and a crowd of three million people for World Youth Day in Rio de Janeiro. Two years later he performed again for the Pope in downtown Philadelphia as part of the World Meeting of Families, appearing along with The Fray, Aretha Franklin, Juanes, Jim Gaffigan and Mark Wahlberg, among others. Maher also recently joined the elite group of musicians and artists as an official Steinway Artist.

KERRY ALYS ROBINSON  Session II - General Session

Kerry Alys Robinson is the founding executive director and global ambassador of Leadership Roundtable, dedicated to promoting excellence and best practices in the management, finances, communications and human resource development of the Catholic Church by harnessing the managerial expertise and financial acumen of senior level lay executives.

Kerry has served as a trustee on the national boards of the Jesuit Volunteer Corps; Education for Parish Service Foundation; the Gregorian University Foundation; the National Catholic AIDS Network; the Institute for Religious Education and Pastoral Ministry at Boston College; the Center of Applied Research in the Apostolate (CARA); the Center for the Study of Church Management at Villanova University; Busted Halo: Paulist Young Adult Ministries; America Media; Raskob Foundation for Catholic Activities; FADICA (Foundations and Donors Interested in Catholic Activities); and the National Pastoral Life Center. From 1995 to 2010 she served on the national committee for the U.S. Catholic Conference of Bishops’ Catholic Campaign for Human Development. She has served on the advisory boards of Voices of Faith, a global platform in the heart of the Vatican to celebrate the contribution of women to the Church and world; the Initiative of Catholic Social Thought and Public Life at Georgetown University; and the Get in Touch Foundation, an international health advocacy organization. In addition to the Raskob Foundation for Catholic Activities, Kerry currently serves on the boards of Saint Thomas More Catholic Chapel and Center at Yale University, the Hartford Bishops Foundation, the International Business Leadership Advisory Council (an initiative of the Secretariat for the Economy in Rome), and the International Festival of Arts and Ideas.

She is the prize-winning author of Imagining Abundance: Fundraising, Philanthropy and a Spiritual Call to Service and is the founding editor of The Catholic Funding Guide: A Directory of Resources for Catholic Activities first published by FADICA in 1998 and now in its 8th edition. She has been an advisor to grantmaking foundations, charitable nonprofits and family philanthropies since 1990. She is a frequent writer and speaker on the subjects of philanthropy, development and faith and is a columnist for Chicago Catholic and has a blog on spirituality called “Love in Ordinary Time.”

BOB MCCARTY  Session III - General Session

Bob McCarty is a pastoral ministry consultant and trainer and has been in professional ministry since 1973, serving in parish, school, diocesan, and national settings. He offers consultations, retreats, workshops and training programs in ministry skills and issues internationally. Bob serves as the project coordinator for the Saint Mary’s Press research project, Going, Going, Gone: The Dynamics of Disaffiliation in Young Catholics.

His recent books are Thriving in Youth Ministry; The Vision of Catholic Youth Ministry: Fundamentals, Theory and Practice; Be A Champion for Youth: Standing With, By and For Young People, co-authored with his wife, Maggie; and Faith Talk: Having Conversations with Young People That Matter! through Saint Mary’s Press.

Bob is a volunteer in his parish youth ministry and catechetical program at St. Francis of Assisi Parish in Fulton, MD. Bob has a BS in Sociology/Theology from St. Joseph’s University, an MA in Religious Education from LaSalle University and a D.Min. from the Graduate Theological Foundation in Indiana.

Bob is adjunct faculty at The Catholic University of America and The University of Dallas. His hobbies include rock climbing, cycling, and grandparenting!
**BRIAN CORBIN** Session IV/V - Concurrent Sessions M-1&2A

For Brian Corbin Catholic Charities is “a ministry of the bishop that enables us to continue the work of the early Apostles in caring for the widows, orphans and strangers among us.”

Prior to joining Catholic Charities USA as the Executive Vice President of Member Services (2015) and Senior Vice President of Social Policy (2014), Brian served as the Diocese of Youngstown, OH’s Executive Director for Catholic Charities Services and Health Affairs; the Secretary/Treasurer for the Diocese of Youngstown Catholic Charities Corporation; the Diocesan Director for Migration and Refugee Services (MRS); Diocesan Director of the Catholic Campaign for Human Development (CCHD); the Diocesan Director of Catholic Relief Services (CRS); and the Diocesan Liaison for the Northeast Ohio Diocesan Council of St. Vincent de Paul. In these roles -- with over 27 years of service at the Diocesan level -- he was responsible for providing leadership to and coordination for the health and social ministries of the Church and creating opportunities for Church and community leaders to understand and be formed in Catholic social doctrine, helping persons and institutions to live out the Corporal Works of Mercy. Brian served as the Secretary of the national Board of Trustees of Catholic Charities USA and chaired the National Advisory Council of the United States Conference of Catholic Bishops (USCCB). Over the past 31 years, he has participated on numerous boards of health and human service corporations and currently serves on the Board of Directors of the Common Wealth Revolving Loan Fund, the Common Wealth Community Development Corporation, the Community Foundation of the Mahoning Valley and Catholic Distance University.

Brian holds a Bachelor of Philosophy degree from The Pontifical School of Philosophy, and a Bachelor of Arts in Politics from The Catholic University of America, D.C. He is completing his Ph.D. at The Massachusetts Institute of Technology (MIT), has completed doctoral work in Organizational Leadership at Youngstown State University, and holds a Certification in Health Care Ethics from The National Catholic Bioethics Center in Philadelphia, Pennsylvania. He has published several academic and popular articles on Catholic social doctrine and political economy. Brian, a member of the Equestrian Order of the Holy Sepulchre of Jerusalem has been with Catholic Charities for over 31 years. He is married to Dr. Donna DeBlasio.

**CHRIS LUKACH** Session IV/V - Concurrent Sessions M-1&2B

Chris Lukach is president of AKCG – Public Relations Counselors, a national public relations consultancy with deep experience in crisis and issue preparedness. As president, Chris heads the AKCG issues and crisis communications practice.

He has been instrumental in developing issues and crisis communications plans and consulting with the firm’s diocesan clients on sensitive and pivotal matters. A frequent lecturer and author on a range of topics, Chris also leads the firm’s spokesperson training and social media teams.

Chris is a magna cum laude graduate of Rowan University, where he received a Bachelor of Arts degree in communications with a specialization in public relations. In 2018, he was named the university’s “Distinguished Alumnus.” He is accredited in public relations by the Public Relations Society of America, and serves on the board of directors of WHYY, Inc., the Philadelphia region’s leading public media affiliate.

**SUZANNE NUNN** Session IV/V - Concurrent Sessions M-1&2C

Suzanne Nunn has worked for almost 10 years at the Orange Catholic Foundation, working closely with board and volunteer committees to establish, protect and preserve the endowment fund holdings. Her most recent project involves working closely with canon and civil lawyers to protect the Foundation assets and holdings from potential claims. This entails identifying areas of vulnerability and eliminating or addressing the issues in order to protect assets against uses other than those intended by the donors – whether this malfeasance is done by someone responsible for the Foundation or by some other authority.

Suzanne works closely with Foundation committees in the establishment and preservation of Endowment Funds. This includes governing documents; policies and guidelines regarding gift acceptance, investment, distributions and fund agreements; and endowment structure and various types of endowment. This work involves working closely with the Diocesan and Foundation Finance office to create a well-structured line of communication.

Suzanne is currently a Board member for the YMCA of Long Beach, chairs the Endowment Committee and an Investment Committee member. Suzanne and her husband Charlie are members St. Timothy parish in Laguna Niguel, CA. They enjoy visiting their 6 children and 11 grandchildren scattered across the US.
PAUL SOBEL  Session VI - General Session

Paul Sobel, CIA, QIAL, CRMA, is Vice President/Chief Risk Officer for Georgia-Pacific, LLC, a privately-owned forest and consumer products company based in Atlanta, GA. He is also serving as the Chairman of the Committee of Sponsoring Organizations of the Treadway Commission (COSO). He’s authored or co-authored four books: Managing the Risk of Uncertainty; Auditor’s Risk Management Guide: Integrating Auditing and ERM; Internal Auditing: Assurance and Consulting Services; and Enterprise Risk Management: Achieving and Sustaining Success. Paul was The Institute of Internal Auditors (IIA) Chairman of the Board in 2013-2014 and has served in other IIA leadership roles. In 2012, he was recognized in Treasury & Risk Magazine’s list of 100 Most Influential People in Finance. In 2017, he received The IIA’s Bradford Cadmus Memorial Award and was inducted into The IIA’s American Hall of Distinguished Audit Practitioners.

FRANK NAPOLITANO  Session VII - General Session

Frank Napolitano is the Director of Risk Management and Insurance Services for the Archdiocese of New York where he manages an insurance program that provides property and casualty insurance to the 700 plan participants and 1900 properties operating within the Archdiocese. He began his career with the Archdiocese in 1998 as an Associate General Counsel in the Archdiocesan Office of Legal Affairs. Prior to holding his current position, Frank was the Director of Parish Finance for the Archdiocese from 2010 to 2016. Before joining the Archdiocese, he was a litigation attorney at the law firm of Kasowitz, Benson, Torres & Friedman in New York City.

Frank holds a B.A. from Columbia University and a J.D. from Brooklyn Law School. He is admitted to practice law before the federal and state courts in New York and Connecticut and before the United States Supreme Court. He is also a Knight Commander in the Order of the Holy Sepulchre.

JAMES W. EVANS, JR.  Session VII - General Session

James W. Evans, Jr. is a Principal Consultant at Albert Risk Management Consultants, an independent advisory firm outside Boston, MA. He directs both the firm’s institutional and alternative risk financing/captive insurance practices. Mr. Evans has been active in assisting many Archdioceses and Dioceses since 1981.

Mr. Evans has been directly involved in the Archdiocese of New York’s risk financing efforts, including the formation and operation of Catholic Indemnity Insurance Company, a single parent captive domiciled in Vermont in 2006. He has also consulted for Catholic Umbrella Pool, a collaborative diocesan risk and its captive CUP Re. Mr. Evans has assisted three other Archdioceses in forming single parent captives as well.

Mr. Evans received an A.B in English and an MBA with a concentration in Finance from Boston College. He also holds the Associate in Risk Management designation. He is a member of the Vermont Captive Insurance Association and has spoken at its annual conference on captive insurance in the religious sector.

KEITH MOULSDALE  Session VIII/IX - Concurrent Sessions T-1&2A

Keith Moulsdale co-chairs the Cyber Security, Information Management & Privacy practice at Whiteford Taylor & Preston. His practice focuses on licensing, IP, data security, privacy and other e-commerce and technology-related legal issues that organizations face, both in the U.S. and internationally. He regularly counsels a wide range of organizations – including financial institutions, software vendors, and trade associations – in connection with their most significant data security concerns, including: data security breach attempts; cross-functional assessment, containment and response efforts; mitigation strategies; information security policies; and compliance with statutory notification requirements.

In addition, Mr. Moulsdale regularly represents software and technology companies that develop and distribute products and services that mitigate data security risks, as well as cybersecurity forensic companies.
ASHLEY CONLEY  Session VIII/IX - Concurrent Sessions T-1&2B
Ashley Conley began her career as an intern auditor in the Assurance Practice of Arthur Andersen in 1995 and became a full-time auditor in 1996 upon graduation. During that time her clients included Sinclair Broadcast Group, State of Maryland, Maryland School for the Blind and the Archdiocese of Baltimore, among many others. Ashley transitioned to the Archdiocese of Baltimore almost 19 years ago as the Archdiocesan Financial Affairs Manager, primarily responsible for the Internal Audit Process. During her time in that role, Ashley managed 4 staff auditors and over 500 internal audits as well as oversaw the implementation of QuickBooks Online in 200+ locations, developed the annual consolidation process of reporting parish and school financial results to Executive Leadership and Archdiocesan Boards and Committees and developed ongoing training for finance personnel at the parishes and schools. In 2011, Ashley took the position of Director of School Finance and worked to assist schools in budgeting, financial reporting and analysis and overall business management. In addition, the role oversaw the Grant and Aid process for the Archdiocese, the Archdiocesan High School Financial Statement audit process and the Catholic Accounting Services group. In 2019, Ashley became the Director of Parish and School Finance and now oversees 4 Regional Controllers that serve the over 140 parishes and over 40 schools within the Archdiocese of Baltimore. In this position, Ashley is leading a change in how Central Services of the Archdiocese of Baltimore serves its locations from a financial perspective.

Ashley has served on several Boards and Committees in recent years, including Archdiocese of Baltimore Investment Committee, New Cathedral Cemetery and St. John Regional School, John Carroll High School and the United Way of Central Maryland.

Ashley Conley is a 1996 graduate of the University of Delaware with a BS in Accounting and Minor in Economics. In May 2018, Ashley received her Masters of Nonprofit Administration from the University of Notre Dame. Ashley currently lives in Eldersburg, Maryland with her husband Jason and three children Garrett (14), Mackenzie (12) and Gavan (10).

CATHERINE FAVRE  Session VIII/IX - Concurrent Sessions T-1&2B
Catherine Favre graduated from Lamar University with a Bachelor of Business Administration in Accounting in 1986. In 1995, the Diocese of Beaumont employed Ms. Favre as the Accounts Receivable Clerk. Along with serving as account receivable clerk, she performed all duties within accounting for 18 years. She performed the duties of payroll clerk, accounts payable clerk, Staff Accountant, Assistant Accounting Manager and Accounting Manager and was integral part in collaborating with the Diocesan Stewardship Department on the Annual Appeal. Since 2004, she has been an integral part of building an Accounting Service for the Diocese. In July 2013, Bishop Curtis Guillory created the Multi-Parish / School Accounting (MPSA) Department and Ms. Favre was named Director for this department. Currently the Diocese of Beaumont Multi-Parish/School Accounting Department employs four accountants and an accounting clerk. The Accounting Service operates at 29 locations, which include three schools. Ms. Favre continues to promote the MPSA Department among the priests of the Diocese of Beaumont and is an advocate for this service among other (Arch) Dioceses.

Along with the duties above, Ms. Favre collaborates with the Diocese of Beaumont Information Technology Department in transitioning to new Accounting and Church software that utilize a Virtual Machine concept and helped in creating a universal e-mail domain for all essential staff at the parishes and schools. Ms. Favre collaborates with the Diocese of Beaumont Human Resources to streamline the required paperwork for new hire employees.

SHEILA MURRAY  Session VIII/IX - Concurrent Sessions T-1&2C
Sheila Murray serves as the Diocese of Greensburg Chief Financial Officer. In this capacity Mrs. Murray is responsible for the business services of the Diocese, including finance, development, information technology, conference center, and facilities management. She is also responsible for managing diocesan investments, including two pension plans, endowments, parish deposit and loan fund, and operational short-term investments. She serves as a Trustee for the Catholic Institute of the Diocese of Greensburg and is a member of the Management Team for the Diocesan Finance Council and the Catholic Foundation boards.

Mrs. Murray’s career encompasses over three decades of service to non-profit organizations in various capacities. Immediately prior to being appointed as Chief Financial Officer in December 2010, she was the Director for Financial Operations at the Diocese of Greensburg since 1996. Prior to joining the Diocese, Mrs. Murray served as Controller at Goodwill Industries of Southwestern Pennsylvania, and Senior Auditor for Maher Duessel, CPAs, where the majority of her clients were not-for-profit entities. She was also Director of Finance/Treasurer for the Municipality of Murrysville.

Mrs. Murray holds an M.B.A from the University of Pittsburgh, and a Bachelor of Science degree in Accounting from Northwestern Oklahoma State University. She is licensed to practice accounting from the State of Pennsylvania since 1994, is a member of the AICPA and PICPA, and is also a Certified Diocesan Fiscal Manager. She spends her free time volunteering for her parish, Blessed Sacrament Cathedral.
MATT HAVERSTICK  Session VIII/IX - Concurrent Sessions T-1&2C
For over 20 years, Matt Haverstick, a Litigation Partner at the Philadelphia law firm of Kleinbard LLC, has represented government officials, private entities and individuals in high-profile, media intensive matters, ranging from major grand jury investigations to the defense of the constitutionality of state laws. Matt also specializes in defending religious organizations in criminal, grand jury and civil investigations of sexual abuse. He is well known for his ability to defend important government public policy decisions in front of the Pennsylvania Supreme Court, having argued there 7 times in the past few years. Matt understands the critical importance of serving as a trusted advisor and counselor to his clients and not just as their litigation counsel. He is adept at handling media inquiries often acting as a spokesman on behalf of his clients in high profile matters.

JIM CEPLECHA  Session X/XI - Concurrent Sessions W-1&2A
Jim Ceplecha is the managing director of Christian Brothers Retirement Planning Services. He has 37 years of experience working with Catholic organizations, with the last 28 of those years overseeing the defined benefit and defined contribution plans for Christian Brothers Services. He began his career at Christian Brothers Services in 1982 and was named managing director of Retirement Planning Services in 1990. The retirement services division provides retirement services to over 1,000 Catholic Church employers with over 40,000 participants and total assets in the plans nearing $2 billion.

Jim is a Fellow in the International Society of Certified Employee Benefit Specialists, a board member for the Diocese of Joliet Priests Retirement Plan and the chair of the Church Benefit Association's Retirement Planning Group.

TODD TIMMERMAN  Session X/XI - Concurrent Sessions W-1&2A
Todd Timmerman is Founder and Managing Director of RPA Financial (Retirement Plan Analytics). 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.

Todd and his team at RPA are on a mission to help clients be stewards by making 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. The team at RPA serves over 20 national denominations and faith-based ministries. In the last 4 years, RPA has earned over 200 clients and consults on plan assets in excess of $17 billion.

WALT COUGHLIN  Sessions X/XI - Concurrent Sessions W-1&2B
Walt Coughlin is an Executive Vice President at Coughlin & Co., which is a third-generation family owned investment banking firm founded in 1932. In his 33-year career, Walt has completed taxable and tax-exempt financings for a nation-wide network of Diocesan and Catholic parish, school and apostolate clients with transactions raising well in excess of $1,000,000,000. Walt is a graduate of Stanford University and the Kellogg School of Management at Northwestern and an active participant in a wide variety of local and national Catholic boards.
MICHAEL SCHIERL  Sessions X/XI - Concurrent Sessions W-1&2B

Michael Schierl is the Senior Partner of Julius Capital, founded in 1993, and Immaculata Law Firm, founded in 2009. A graduate of Harvard Law School and the University of Notre Dame, Mr. Schierl has over two decades of experience designing and helping his nonprofit clients implement funding solutions which integrate finance (borrowing), traditional fundraising (capital campaigns and annual giving) and balance sheet philanthropy (structured and planned giving). Michael is a recognized leader in the nonprofit financial community for his work developing philanthropy-friendly credit facilities for nonprofit borrowers, ranging from simple loan agreements to more sophisticated bond structures which integrate construction draw, bank debt and public bond capabilities under a single credit facility. Over the last decade, Julius Capital and Immaculata Law Firm have designed and implemented financing solutions for Catholic Organizations providing over $500,000,000 of funding.

JOANIE LEWIS  Sessions X/XI - Concurrent Sessions W-1&2C

As the Appeals & Campaigns Account Executive and Product Leader for Increased Offertory Programs at OSV, Joanie Lewis brings 20 years of experience working with diocese and parishes across the United States to devise plans for offertory and communications which ultimately build parishioner engagement. She also manages and consults with all of OSV's Diocesan and Bishop's Annual Appeal programs across the United States and is responsible for product development and leadership of OSV's Increased Offertory Program, diocesan appeals, and other programs to enhance parish offertory and cultivate parishioner engagement. She has a proven track record of consulting at the parish and diocesan levels to significantly increase offertory and appeal revenue with the focus of fostering vibrant parish communities.

ROBERT SEELIG  Sessions X/XI - Concurrent Sessions W-1&2D

Robert Seelig leads Catholic Funeral & Cemetery Services (CFCS) as its CEO and Founder. He created the vision for CFCS as “Church helping Church” and as such, he continues to look for ways to leverage its investment in resources by providing services to numerous organizations, rather than each organization building them on their own.

Robert had been serving as the Director of Cemeteries for the Diocese of Oakland for nine years when he founded CFCS, and prior to that he was the Vice President of Smith Industrial Supply Company, which later became US Filter. After renovating Oakland’s cemetery system, he saw the synergies developing in the industry and both developed and acquired funeral homes to provide the community with a complete set of services. Upon completion of this strategic initiative in Oakland, there was a call for providing other dioceses with consulting and management services, which led to the launch of Catholic Funeral & Cemetery Services in 2011.

ARCHBISHOP BORYS GUDZIAK

Session XII – Membership Business Lunch with Special Guest Speaker

Archbishop Borys Gudziak is the new Metropolitan Archbishop of Philadelphia of the Ukrainian Greek Catholic Church. He was born in Syracuse, New York, the son of immigrants from Ukraine. After earning a bachelor’s degree in philosophy and biology from Syracuse University, he earned a doctorate in Slavic and Byzantine Cultural History at Harvard University. In 1992, he moved to Lviv, Ukraine where he founded and directed (1992-2002) the Institute of Church History. In 2002 he became Rector of the Ukrainian Catholic University and in 2013 until June 2019, its President. In 2012 he was appointed Bishop of the Ukrainian Greek Catholic Church in France, Belgium, the Netherlands, Luxemburg and Switzerland.

Archbishop Gudziak speaks English, Ukrainian, Italian, Polish, French, Russian, and German. He is the author of a number of scholarly works, among them a doctoral dissertation on sixteenth-century church history, published as Crisis and Reform: The Kyivan Metropolitanate, the Patriarchate of Constantinople, and The Genesis of the Union of Brest (Cambridge, Mass.: Harvard University Press, 1998), as well as numerous articles in European and North American academic journals.
**FEATURED SPEAKERS**

**KATHLEEN McCHESNEY**  Session XIII - General Session

Kathleen McChesney has held unique leadership positions in the Federal Bureau of Investigation, the United States Catholic Bishops’ Conference and The Walt Disney Company prior to establishing Kinsale Management Consulting. She served in many leadership positions in the FBI, heading its field offices in Chicago, Illinois and Portland, Oregon and the FBI’s International Training Academy, before being appointed as an Executive Assistant Director - the Bureau’s third highest position. As an FBI Special Agent, she directed investigations in the areas of organized crime, public corruption and terrorism. As a detective with the King County Police in Seattle, Washington, she specialized in the investigation of homicide and sex abuse cases. As a licensed private investigator, Dr. McChesney has conducted sensitive confidential internal investigations of employee misconduct, theft and fraud. Associates are subject matter experts and former law enforcement executives from federal, state and municipal agencies with extensive experience in risk management, security and crime prevention and investigations.

Dr. McChesney was selected by the United States Catholic Bishops’ Conference to establish and lead a national office for child protection. She developed and oversaw a national compliance mechanism to ensure that all Catholic dioceses complied with civil laws and internal policies relative to the prevention, reporting and response to the sexual abuse of minors. She coordinated a major research study into the nature and scope of the problem of sexual abuse in the Catholic Church and has published and lectured frequently on the issue of sexual abuse of minors in youth-serving organizations.

Dr. McChesney is the co-author/co-editor of two books: *Sexual Abuse in the Catholic Church: A Decade of Crisis* (2012); and *Pick Up Your Own Brass: Leadership the FBI Way* (2010). She received her Ph.D. in Public Administration from Golden Gate University, her M.A. in Public Administration from Seattle University and her B.S. in Police Science and Administration from Washington State University.

**NANETTE LOWE**  Session XIV - General Session

Nanette Lowe is the Executive Director of Human Resources for the Archdiocese of Washington. With over 23 years of experience in Administration and Human Resources, Nanette brings a wealth of expertise that allows her to support pastors, parishes and schools in the Archdiocese. Prior to joining ADW in 2014, Nanette worked for the Eurasia Foundation, an international NGO who promotes civil society and democratic reform in the former Soviet Union where she provided human resources leadership to their head office in Washington DC as well as 13 overseas offices. She then created the human resources infrastructure for a startup organization Securiport, who assists with border control around the globe through biometrics.

Her experiences and love for the Church brought Nanette to the Archdiocese of Washington where her primary responsibility is to serve the Church and to promote a pastoral and human approach to caring for employees while also balancing the compliance and legal landscape. In addition to overseeing health and welfare benefits, organizational development, recruitment, employee relations and all aspects of Human Resources, Nanette is actively involved in implementing Catholic Identity initiatives for the Archdiocese of Washington. Nanette and her husband Michael have been married for 20 years, have two daughters Maari a freshman attending Salisbury University and Tori a freshman attending Archbishop Spalding High School and active parishioners at St. Pius X Church. Nanette earned her Bachelor of Arts degree in Government and Politics from the University of Maryland, College Park.

**ERIC SIMONTIS**  Session XIV - General Session

Deacon Eric Simontis was appointed to the position of Chief Financial Officer for the Archdiocese in Washington DC in January 2016. Prior to that, he worked for 13 years with various private equity firms investing in affiliated television stations across the United States. He has also worked in the high-tech industry and spent 14 years with PricewaterhouseCoopers in Cleveland, Ohio, Leeds, England, Toledo, Ohio and Dallas Texas working in a variety of public and private industries. Eric is responsible for the IT, HR, Parish and Schools, Real Estate and Facilities, Finance and Development departments at the Archdiocese of Washington and was ordained to the diaconate in June 2019. Eric also sits on many of the boards of the affiliated corporations in the Archdiocese and was recently elected to the board of the Catholic Umbrella Pool. Eric earned his Bachelor of Science in Accounting at Miami University in Oxford, Ohio.
REVIEWERS

MR. ROBERT ASH, MBA
Mr. Ash is the Chief Financial Officer for the Archdiocese of Louisville. He is responsible for overall financial management of the Archdiocese. His position oversees all financial and related functions including budgeting, audit, accounting, investments, insurance/risk management, real estate transactions and cemetery operations. Before that he was the CFO of a privately held company (11 years) and a publicly traded company (7 years).

MR. WILLIAM BIGGS, CPA
Mr. Biggs is the Chief Financial Officer of the Archdiocese for the Military Services, USA. In that capacity he has oversight of all areas of finance and administration with involvement in development. Prior to coming to the archdiocese, he worked for 8 years as Director of Finance for the Archdiocese of Washington's Center City Schools Consortium.

MS. LAURA CLARK, CDFM
Ms. Clark is the Chief Financial Officer of the Diocese of San Bernardino. She oversees the Financial Affairs Office, Accounting Services, and Mission Advancement (Development) among other areas. Before joining the diocese, she worked for over 22 years in higher education at the Claremont Colleges, a consortium of small independent colleges in Claremont, California.

MS. SUSAN CLIFTON, CPA
After four years as Comptroller, Ms. Clifton was appointed Chief Financial Officer of the Diocese of Fairbanks. In that capacity, she oversees all financial and insurance operations in the diocese. Upon appointment as CFO, she restructured the Accounting and Finance Department to reduce personnel needs while strengthening internal controls.

MS. TAMMY DILORENZO, CPA
Ms. DiLorenzo is responsible for financial management of the Diocese of Biloxi, Catholic Charities, De L'Epee Deaf Center and the Catholic Foundation. She manages the insurance funds - medical and property and is heavily involved in risk management activities. Prior to joining the diocese, she worked for the office of the State Auditor in Mississippi, public accounting firms and comptroller for the City of Pass Christian.

MR. KEVIN KILEY, CDFM
Mr. Kiley is the Chancellor and Chief Financial Officer for the Diocese of Fall River. Before that he was at the Archdiocese of Boston for 23 years. Mr. Kiley has an accounting degree from Suffolk University. While at the Archdiocese of Boston he had oversight of $31M budget for Central Ministries and oversight of Pastoral Center facility.

MR. PATRICK MARKEY, CPA, MBA
Mr. Markey is the Executive Director of the Diocesan Fiscal Management Conference (DFMC). Before moving to the DFMC he served as Executive Director of the Office of National Collections at the United States Conference of Catholic Bishops.

MS. SHEILA MURRAY, CPA, MBA, CDFM
Ms. Murray is the Chief Financial Officer for the Diocese of Greensburg. She oversees the department of finance, which includes Finance, Information Technology and Facilities, as well as the Development office, and the Bishop Connare Center. She is also responsible for all diocesan investments and coordinates the diocesan self-insurance program.

MR. TONY RABAGO, MBA
Mr. Rabago is the Controller for the Diocese of Phoenix. His bachelors and master's degrees are from Arizona State University. Prior to working for the Diocese of Phoenix he spent many years in accounting, finance and business in the high technology industry and education market including two international assignments.

MR. TIMOTHY THOMAS
Mr. Thomas is Executive Director of Administration and Finance for the Diocese of Marquette. He is responsible for all financial management of the diocese, a member of nine boards and/or finance councils affiliated with the diocese, and the head of human resources. Before joining the diocese, he worked as Comptroller of the Currency in three different states.
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Client/Partner Account Manager
445 Union Boulevard, Ste. 120
Lakewood, CO 80228
877-332-3742
marketing@serenic.com

Steiger Group, Booth #314
Mr. Matt Vuorela
President
10844 Old Mill Rd.
Omaha, NE 68154
402-829-8656
mvuorela@steigergroup.com

The Concord Advisory Group, Booth #105
Mr. Scott Santin
Managing Partner
700 Alexander Park, Ste. 203
Princeton, NJ 08540
609-987-9000
ssantin@concordadvisory.com

The National Catholic Risk Retention Group, Booth #207
Mr. Dennis H. O’Hara
President & CEO
801 Warrenville Road, Ste. 175
Lisle, IL 60532
630-725-0986
dohara@tncrrg.org

KEYNOTE, GENERAL SESSION I: Matt Maher
Sunday, Sept. 29, 2019
Christian Brothers Investment Services, GOLD Booth #101
Mr. Jeffrey A. McCroy – President & CEO
20 North Wacker Dr., Suite 2000
Chicago, IL 60606
312-803-4724
jmccroy@cbisonline.com

MONDAY BREAKFAST
Monday, Sept. 30, 2019
Merrill Lynch / Bank of America
Mr. James Ryan – Managing Director
225 Liberty Street, Floor 41
New York, NY 10281
212-236-5143
james_t_ryan@ml.com

GENERAL SESSION II: Kerry Robinson
Monday, Sept. 30, 2019
Notre Dame Federal Credit Union
Mr. Robert Kloska – Chief National Partnership Officer
P.O. Box 7878
Notre Dame, IN 46556
574-400-4731
RKloska@notredamefcu.com

MONDAY MORNING BREAK
Monday, Sept. 30, 2019
Grant Thornton, LLP
Mr. Scott Steffens – Partner
1000 Wilson Boulevard, Suite 1400
Arlington, VA 22209
703-847-7680
scott.steffens@us.gt.com

MONDAY LUNCHEON
Monday, Sept. 30, 2019
Diamond Hill Capital Management, Inc
Mr. Trey Rouse, CFA – Director - Institutional Relationships
325 John H. McConnell Blvd., Suite 200
Columbus, OH 43215
614-255-3333
trouse@diamond-hill.com

MONDAY AFTERNOON BREAK
Monday, Sept. 30, 2019
Mutual of America, Booth #208
Mr. James Murphy – Senior VP, Marketing
Four Westbrook Corporate Center
Westchester, IL 60154
708-836-0644
james.murphy@mutualofamerica.com
TUESDAY BREAKFAST
Tuesday, Oct. 1, 2019
Baird Funds, Booth #308
Mr. Richard Whittow – Managing Director
777 E. Wisconsin Ave.
Milwaukee, WI 53202
414-298-1060
rwhittow@rwbaird.com

GENERAL SESSION VI: Paul Sobel
Tuesday, Oct. 1, 2019
Burke, Warren, MacKay & Serritella, P.C.
Mr. James Serritella – Partner
330 N. Wabash Ave, Suite 2100
Chicago, IL 60611
312-894-3241
tlyman@salawus.com

TUESDAY MORNING BREAK
Tuesday, Oct. 1, 2019
SmithAmundsen, LLC
Mr. Thomas J. Lyman, III, Partner
150 N. Michigan Ave., #3300
Chicago, IL 60601
312-894-3241
tlyman@salawus.com

TUESDAY LUNCHEON
Tuesday, Oct. 1, 2019
USI Consulting, Booth #419
Mr. Bill Tremko – President & CEO
95 Glastonbury Rd., Ste 102
Glastonbury, CT 06033
860-368-2939
bill.tremko@usi.com

TUESDAY AFTERNOON BREAK
Tuesday, Oct. 1, 2019
Mesio row Financial
Mr. James J. Kilbane
Managing Director
353 N. Clark Street
Chicago, IL 60654
312-595-6761
jkilbane@mesirowfinancial.com

WEDNESDAY BREAKFAST
Wednesday, Oct. 2, 2019
Catholic Cemetery Conference
Mr. David J. LaBarre
Executive Director
1400 S. Wolf Road, Bldg. 3
Hillside, IL 60162
708-202-1242
dlabarre@catholiccemeteryconference.org

WEDNESDAY MORNING BREAK
Wednesday, Oct. 2, 2019
FloQast
Mr. Marc Bleimann and Mr. Shaun Robinson
Account Executive
14721 Califa Street
Sherman Oaks, CA 91411
marc.bleimann@floqast.com
shaun.robinson@floqast.com

GENERAL SESSION XIII: Kathleen McChesney
Wednesday, Oct. 2, 2019
The National Catholic Risk Retention Group, Booth #207
Mr. Dennis H. O’Hara
President & CEO
801 Warrenville Rd., Ste 175
Lisle, IL 60532
630-725-0986
dohara@tncrrg.org

WEDNESDAY BUSINESS LUNCHEON
Wednesday, Oct. 2, 2019
ADP
Mr. Eric Humbert
District Sales Manager
100 NW Point Blvd.
Elk Grove, IL 60007
847-718-3505
eric.humbert@adp.com

WEDNESDAY AFTERNOON BREAK
Wednesday, Oct. 2, 2019
Catholic Order of Foresters
Mr. Michael Deering
Vice President Investments
355 Shuman Blvd.
Naperville, IL 60563
331-229-5622
mdeering@catholicforester.org

WEDNESDAY CLOSING RECEPTION AND AWARDS
Wednesday, Oct. 2, 2019
Garrigan and Associates
Mr. Richard P. Garrigan
President
P.O. Box 540202
Omaha, NE 68154
402-333-4279
devq@aol.com

NOTEPADS AND PENS
Goldman, Sachs & Co., LLC
Mr. Dennis Howie
Investment Advisor
3414 Peachtree Road, Ste. 600
Atlanta, GA 30326
404-846-7360
Dennis.howie@gs.com

SCHOLARSHIP SPONSOR
Catholic Extension
Mr. Kevin McGowan
CFO
150 S. Wacker Drive, Ste. 2000
Chicago, IL 60606
312-795-5133
kmcgowan@catholicextension.org

SCHOLARSHIP SPONSOR
United States Conference of Catholic Bishops,
Office of National Collections
Ms. Mary Mencarini-Campbell
Executive Director
3211 4th Street NE
Washington, DC 20017
202-541-3146
mcampbell@usccb.org
<table>
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<th>Date</th>
<th>Year</th>
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<td>September 13-16,</td>
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Mindful of our special ministry in the Roman Catholic Church as the extension of the diocesan bishop in fiscal matters, the members of the Diocesan Fiscal Management Conference (DFMC) are united to serve the Church in the ministry of fiscal management.

In particular, this organization:
- Promotes the spiritual growth of its members.
- Encourages the development of professional relationships among members.
- Facilitates the free exchange of ideas and information.
- Provides fiscal and administrative expertise and professional services to the local and national Church.
Thank You
for becoming part of this unique opportunity by joining other DFMC members as we gather for our annual conference.

September 29 - October 2, 2019
HYATT REGENCY CHICAGO
CHICAGO, ILLINOIS

Welcome to Chicago, Illinois

~ Energize ~ Learn ~ Pray ~ Share ~ Relax ~ Prepare ~ Collaborate ~