THANK YOU
for becoming part of this unique opportunity by joining other DFMC members as we gather for our annual meeting.

JOIN US FOR THE DFMC VIRTUAL ANNUAL MEETING
SEPTEMBER 14–17, 2020

www.dfmconf.org
OUR MISSION:

TO PROVIDE LEADERSHIP IN FISCAL MANAGEMENT TO THE CATHOLIC CHURCH.

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.

VIRTUAL ANNUAL MEETING
SEPTEMBER 14 - 17, 2020

HOSTED BY:

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ARCHBISHOP OF DENVER

Most Reverend Barry C. Knestout
BISHOP OF RICHMOND

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PLEASE NOTE THAT SPEAKER HAND-OUTS ARE CONVENIENTLY POSTED IN THE “MEMBERS ONLY” AREA OF OUR DFMC WEBSITE:
www.dfmconf.org

OCTOBER 3-6, 2021

NASHVILLE, TENNESSEE
GAYLORD OPRYLAND RESORT & CONVENTION CENTER
On behalf of Bishop Knestout and the entire Diocesan Fiscal Management Conference (DFMC) Board of Directors, it is my privilege to welcome you to the 50th annual meeting!

As you are probably aware, the first DFMC was held in Denver and it was our plan to go back to the Mile High City for our milestone 50th conference; however, current conditions have forced us to think outside the box - so far outside the box that the 50th conference can be attended from the comfort of your living room!

We are excited to hold our first virtual conference which will include top notch presenters covering topics pertinent to the challenges we are currently facing due to current circumstances.

The conference will kick off on Monday, September 14 and conclude on Thursday, September 17. The program schedule is designed to be during “work hours” (keep in mind our participants cover several time zones) and will include an exhibition hall with our great exhibitors, opportunities to mix with colleagues, and extra CPE. All of this for the lowest cost yet as there will be no travel expenses and a lower than usual registration fee. Our hope is that the lower cost will make it possible for more people to attend, so please share this opportunity with your staff members.

Please take note that we have a good amount of scholarship money available from our partners to cover registration costs.

The DFMC board would like to thank Catholic Extension, the USCCB Subcommittee on Catholic Home Missions and the following exhibitors for helping fund scholarships:

Platinum Booth Sponsors:
• Captrust
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• DeMarche
• FACTS Management
• Greater Mission
• Manning and Napier
• PrimePay
• Reinhart Partners

There is a great way that you can give back to these supporting diocesan friends, especially if you are a recipient of a scholarship. During the exhibit hour breaks at the meeting, stop by the virtual booths of these partners, enter into a zoom chat with them, and personally thank them for their generous support.

Despite the challenges the world is throwing at us, we are confident that this year’s DFMC will be informative and memorable. Although human interaction cannot be replaced, it is extremely important that we stay connected.

This conference offers us the opportunity to speak, learn, and pray together - which is more important than ever as we face the challenges ahead of us. We look forward to catching up with all of you at the 50th DFMC in September.

SEE YOU VIRTUALLY SOON!
MONDAY, SEPTEMBER 14

8:00am-8:30am  MORNING PRAYER

9:00am-9:30am
10:00am-10:30am
11:00am-11:30am

8:30am-10:00am  PRE-CONFERENCE INTERNAL AUDIT FORUM
Mr. Jorge Montenegro, Spanish Facilitator
Mr. Don Borisch and Ms. Kathy Hogan, English Facilitators
Reviewer: Patrick Markey, CPA, MBA (1.8 CPE, Auditing - Technical)
Bring your ideas, questions, and comments to this forum for networking and sharing with other internal auditors and fiscal managers from around the country in an informal setting.
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.

10:30am-12:00pm
11:30am-1:00pm

10:30am-12:30pm

OPENING SESSION, WELCOME AND KEYNOTE - REASON FOR HOPE!
Mr. Chris Stefanik, Real Life Catholic - Founder and President
Reviewer: Keith Parsons, CPA (2 CPE, Personal Development - Non-Technical)
All seemed lost when the apostles were locked in the upper room. It wasn’t during easy times that they received the best news ever told, and their commission to share it. It was while they were “quarantined,” for fear of death that they heard, “He is risen!” It was in the midst of persecution that the early Church flourished, with laser focus on why they existed, as Church, in the first place. These are not easy times in the Catholic Church in America. But now, as in 33AD, God is breaking in, leading us, and offering us hope. Now, as for the first Christians, trials necessitate laser focus. When everything seems in flux, it’s time to come back to unchanging things. To first things. And to start anew.
Learning Objectives: By the end of the program the participants will
1) Understand the strategic necessity of a Church that articulates the WHY in every level of ministry, financial decision making, and communications.
2) Learn practical advice on how to implement the WHY.
3) Learn the real reasons for hope in a renewal right now.
4) Be full of hope for their work in the diocese and for the future of the Church.

1:00pm-2:00pm
2:00pm-3:00pm
3:00pm-4:00pm
4:00pm-5:00pm

SESSION II - MIGRATION AND THE USCCB-HISTORY/PRESENT CHALLENGES
Mr. William Canny, USCCB, MRS - Executive Director
Reviewer: Dcn. Aruna Silva (1.2 CPE, Specialized Knowledge - Technical)
The session will delve into the history of the USCCB involvement in forced migration including aspects of initial resettlement programs, the US/Mexican Church’s pastoral letter on migration, modern day programs sponsored by USCCB in collaboration with the Catholic Charities offices, immigration reform. The speaker will also brief touch on some of the specific reporting and accounting requirements of the federal government.
Learning Objectives: By the end of the program the participants will
1) Know the genesis of the initial refugee resettlement programs of the Church.
2) Understand the basic principles of migration as outlined in “Strangers no Longer.”
3) Understand federal guidelines for storage of documents.
4) Understand current federally funded programs of USCCB.

This session is made possible in part through a generous gift from CBIS.

9:00am-9:30am
10:00am-10:30am
11:00am-11:30am
SESSION III - GIFT ACCEPTANCE AND DISPOSITION
Mr. Peter de Keratry, Archdiocese of Oklahoma City - Executive Director, Stewardship & Development
Reviewer: Timothy Thomas (1.2 CPE, Management Services - Technical)
Gift Acceptance and Disposition will explore best practices in the acceptance and disposition of gifts to the Church. The session will explore various types of gifts such as cash, appreciated securities, Qualified Charitable Distributions from IRA’s, and encumbered property. It will also explore best practices in receipting and acknowledgment for Donor Advised Funds, Foundations, IRA’s and other entities.

Learning Objectives: By the end of the program the participants will
1) Understand the unique circumstances for receipting non-cash gifts.
2) Understand the difference between receipts and acknowledgement.
3) Identify some of the challenges with accepting encumbered property.
4) Understand how QCD’s can be valuable tools of giving.
5) Identify tax advantageous vehicles for giving.

SESSION IV - DIOCESAN PAYROLL SYSTEM STRATEGIES
Dn. Aruna Silva, Diocese of Las Vegas - Chief Financial Officer
Mr. Keith Parsons, Archdiocese of Denver - Chief Operating Officer
Reviewer: Sheila Murray, CPA, MBA, CDFM (1.2 CPE, Accounting - Technical)
This session will explore the successes, failures, and lessons learned from diocesan payroll systems including implementation issues and various approaches to structuring - decentralization, centralization, or standardization. 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 payroll system or beginning a new one. Participants will leave with a better understanding of how to best execute a payroll system in their diocesan situation. This is especially important as federal and state law around payroll and benefits become more complex and reporting more involved and complicated.

Learning Objectives: By the end of the program the participants will
1) Know the types of structures dioceses use to process payroll and benefits.
2) Know the positive and negative aspects of the various structures.
3) Know what to consider in implementing a new payroll system.
4) Understand some of the issues that the staff will encounter with a new payroll system.

SESSION V - CATHOLIC SCHOOL SUSTAINABILITY
Dr. John Staud, Notre Dame, Alliance for Catholic Education - Executive Director
Dr. Erin Barisano, Diocese of Orange - Superintendent of Schools
Reviewer: Elizabeth Jensen, CPA (1.2 CPE, Specialized Knowledge - Technical)
How do we ensure that our Catholic schools will survive in a changing landscape? The Diocese of Orange recently completed a School Sustainability Study as part of the diocesan strategic plan. This session will offer an overview of the study and explain the implementation of various recommendations that affect school sustainability. We will explore the successes and challenges associated with leading systemic change as well as the importance of a clear mission to navigate change. With a focus of advancing the mission of our Church, we will discuss school staffing, marketing and enrollment, tuition, financial assistance, and development. We will also highlight the importance of collaboration between the Department of Catholic Schools and Department of Finance.

Learning Objectives: By the end of the program the participants will
1) Understand the process used to complete a school sustainability study.
2) Have learned the successes and challenges of implementing change at the diocesan level.
3) Understand the importance of mission-focused leadership while leading change.
SESSION VI - EVERYONE LEADS: HOW TO REVITALIZE THE CATHOLIC CHURCH

Chris Lowney's presentation will begin by highlighting some of the disconcerting challenges now facing the Church: declining sacramental participation, challenges engaging young people, and a striking imbalance in the proportion of adult "leavers" versus those who join. While we often attempt to meet these challenges by drawing on checklists, programs, or best practices, Chris will suggest that as (or more) important than any program is an underlying culture change that must effect how we think, behave, and make decisions. Specifically, Chris will talk about three dimensions of that change: becoming more entrepreneurial, becoming more accountable, and fostering an environment where all in the Church understand themselves as having a leadership opportunity and responsibility.

Learning Objectives: By the end of the program the participants will
1) Be more familiar with data points indicating challenges the Church is facing.
2) Understand how the phrase "leadership" can apply to all Catholics as nothing more than the embodiment of the baptismal promise.
3) Understand that "entrepreneurial" is a word that applies not only to businesses but to how we think about our Church ministries.
4) Perceive how we might become a more accountable Church, in the sense of tracking and monitoring the goals and impact of our ministries.


This presentation wants to offer an overview of the understanding of the role of the pastor and the responsibilities of the Parish Finance Council. It will offer a dialogue that may illustrate a balance between this understanding and current business practices.

Learning Objectives: By the end of the program the participants will
1) Understand the roles & responsibilities of finance council.
2) Understand the role and responsibility of the pastor over the finance council.
3) Understand Accountability vs. Restriction of Power.
4) Have a better understanding on how to work with pastors.
SESSION VIII - DISASTER RECOVERY - HOW TO TURN DISASTER INTO OPPORTUNITY

Mr. Tom Gordon, Catholic Extension Society - Chief Operating Officer
Mr Matt Hochstein, Hagerty Consulting - Vice President, Client Services
Reviewer: William Biggs, CPA (1.2 CPE, Specialized Knowledge - Technical)

Many dioceses experience disasters that can cause major damage and disruption to the operations of their Churches, Schools, Catholic Charities and Ministries such as hurricanes, wildfires, floods, tornadoes, and now a pandemic. Once an event is declared a Federal Disaster, there are many Federal Funding opportunities (FEMA and other programs) available to the Church after many years of being excluded from these programs. This session will provide an overview on what you can do now to be prepared to access FEMA and other federal programs when the next disaster occurs. It will review the documentation needed to trigger access to programs and the types of expenditures that are recoverable. The presenters will provide tools to help the diocese gather documentation in the right format for submittal to FEMA and other federal programs.

Learning Objectives: By the end of the program the participants will
1) Learn about changes to Federal regulations that allows Church organizations to access federal funds.
2) Learn what triggers access to federal funds and the significant amount of funds available to Church organizations.
3) Learn how federal programs are complex and often lack clarity, which is why expert guidance is helpful in these very difficult situations.
4) Learn what you can do now to be prepared for the next disaster.
5) Learn the types of expenditures covered by federal funds including the cost of administering the federal application process.
6) Have access to a Disaster Preparation & Recovery Toolkit to help a diocese better prepare for, respond to, and recover from major disasters and national emergencies.

SESSION IX - FINANCIAL ASSISTANCE FOR PRIESTS AND BISHOPS NO LONGER IN MINISTRY

Ms. Diane Barr, Archdiocese of Baltimore - Chancellor
Reviewer: Susan Clifton, CPA (1.2 CPE, Business Law - Technical)

A consideration of “financial assistance for priests and bishops no longer in ministry” necessarily begins with the Church’s teaching on the demands of justice and the implication of this teaching. This session will explore the application of professional principles to three fundamental questions: How is the Church served by the professional? Does the topic of financial assistance concern the integrity of ordination? What principles or norms of law are relevant to the use of temporal goods of the Church?

Learning Objectives: By the end of the program the participants will
1) Be introduced to the theological principles requiring appropriate application of professional principles.
2) Be introduced to the norms of Church law governing the ministry, status and care of ordained ministers.
3) Be invited to develop a practical approach to the individual situation of financial assistance for a priest or bishop no longer in public ministry that meets the perceptions of justice of members of the community.
4) Better understand the Church’s teaching on the demands of justice and its implications.
SESSION X - ADAPTING YOUR DIOCESE AND LEADERSHIP TO ACCELERATING CHANGE AND VOLATILITY

Mr. L. Ben Lytle, Lytle Healthcare, LLC - Partner
Reviewer: Sheila Murray, CPA, MBA, CDFM (1.2 CPE, Personal Development - Non-Technical)

The forces of democratization, deinstitutionalization, demographic change, and innovation are reshaping life and organizations as never before in history. Those living in 2050 will look back to find life in 2020 unrecognizable. Expect positive and negative life-changing events of the 21st Century’s first two decades to become more frequent and consequential in the next three decades. The post WWII success model no longer works for employees or organizations and must be adapted to a new reality. Mission-driven organizations such as the dioceses and their leadership can position themselves and their organizations to adapt. Failing to adapt will result in declining constituencies, relevance, and connection particularly to the young. There are examples of organizations on the leading edge of adaptive strategies.

Learning Objectives: By the end of the program the participants will
1) Better understand the reality and consequences of accelerating change.
2) Understand what the terms democratization and deinstitutionalization really mean and what their relevance is for dioceses.
3) Have learned about the "post WWII success model" and what is emerging to replace it, including the consequences to individuals, families, and dioceses.
4) Understand the indicators that inform organizations and whether they are ripe for disruption or adaptation.
5) Learn what can leadership do to become proactive and adaptive.

SESSION XI - FULFILLING MISSIONS DURING VOLATILE ECONOMIC CONDITIONS

Mr. Kyle Campbell, CAPTRUST - Vice President, Financial Advisor
Mr. Kevin Barry, CAPTRUST - Chief Investment Officer
Mr. Stephen H. Schott, CAPTRUST - Principal & Director
Reviewer: Timothy Thomas (1.2 CPE, Finance - Technical)

Successfully fulfilling the mission of a nonprofit depends on careful control, planning, and financial oversight of spending, investments, and long-term portfolio health. Sit in with CAPTRUST’s assembly of award-winning subject matter experts for a deep dive into CAPTRUST’s survey of more than 130 endowments and foundations detailing what the nonprofit sector is saying about managing their organizations investment portfolios biggest challenges and obstacles. Find out what kind of governance practices are most supportive, why a poorly understood or implemented spending policy may be worse than not having one at all, and what every nonprofit needs to know about using liquidity to meet capital needs. In addition, this expert-led session will cover industry standards for deposit and loan programs, as well as best practices for setting up or converting to a defined contribution plan.

Learning Objectives: By the end of the program the participants will
1) Look at the array of implications market volatility could have on the overall health of a financial portfolio.
2) Know how to use spending policies to advance the mission of an organization and its multiple goals.
3) Identify areas to improve policies and strengthen the overall structure of nonprofit governing bodies.
4) Understand nonprofit industry standards and best practices for the financial wellness of Catholic Investment pools.
5) Gain insight into the unique circumstances nonprofits face during times of market volatility.
SESSION XII - THINKING OUTSIDE THE XBOX
Mr. Robbie Bach, Author and Speaker
Reviewer: Susan Clifton, CPA (1.2 CPE, Management Services - Technical)

In a world where change is accelerating, Robbie Bach shares valuable insights on how to turn disruptive forces into transformative opportunities. Based on his experiences innovating within Microsoft and leading the creation of one of the most successful business units of our time -- the iconic Xbox and Xbox 360 gaming consoles -- Robbie outlines proven practices for any organization to foster fruitful change. From his 3P strategic framework (Purpose, Principles & Priorities) to his concept of “intrapreneurship” to drive innovation within large organizations, Robbie explores how to utilize existing resources and identify new tools and future trends to transform organizations. Far from a technology talk, Robbie demonstrates the strategic, operational, and cultural initiatives required to turn ever-present disruptions into productive opportunities.

Learning Objectives: By the end of the program the participants will
1) Recognize opportunities presented by systemic change.
2) Learn a strategic framework to manage change productively.
3) Identify new ideas in business, experience and technical areas.
4) Evaluate different modes of leadership and how they can use their own skills.
5) Realize the overwhelming imperative to manage culture proactively.

SESSION XIII - CATHOLIC CEMETERIES: LESSONS LEARNED AS AN ESSENTIAL BUSINESS IN THE COVID CRISIS
Mr. Robert Seeling, Catholic Funeral & Cemetery Services - Chief Executive Officer
Reviewer: Jorge Montenegro, CIA (1.2 CPE, Specialized Knowledge - Technical)

Learn about the “crisis management” model deployed by CFCS in over 15 dioceses during the coronavirus crisis. With coronavirus burials and employee anxiety, the Catholic cemeteries became a front-line ministry. New models of communication, emergency support services, employee engagement, and family service have forever changed the approach CFCS is taking to this vital ministry. Attendees will receive resource books and tools as a guide for current and future planning.

Learning Objectives: By the end of the program the participants will
1) Learn new methods for burial and funerals during the crisis and beyond.
2) Learn how cemeteries are a front line ministry.
3) Learn how cemeteries can still provide the best family service amidst all the change.
4) Learn how to transition from crisis management to a thriving ministry.

SESSION XIV - RESTART & REFRESH: RAISING CAPITAL TO JUMPSTART PARISH FINANCIAL RECOVERY
Mr. Ray Coogan, OSV - Senior Account Executive
Mr. George Betancourt, OSV - Senior Account Executive
Reviewer: William Biggs, CPA (1.2 CPE, Finance - Technical)

It is likely that offertory giving will take priority coming out of this crisis, and it should. In fact, a parish’s offertory should be stabilized to the greatest extent possible. But, following the COVID-19 crisis and into the future, parishes will likely need an infusion of cash to fully cover operating costs, structural maintenance needs and needed equipment (HVAC, heater, water boilers, etc.) that can’t otherwise be attained through operating funds. This is especially true if the parish is in recovery mode and the offertory funding and budget is tight. It is important to take new approaches with raising funds, and use the effort to highlight a new, refreshed, and positive approach to supporting the Church community.

Learning Objectives: By the end of the program the participants will
1) Understand the environment needed to establish an effective fundraising effort.
2) Learn general guidelines to a process that has proven successful in delivering results.
3) Learn some common pitfalls to avoid during campaign execution.
4) Learn new considerations developed from the recent social distancing environment.
5) Learn steps to take to evaluate options and prepare for the beginning of a successful campaign.
SESSION XV - RACISM IN THE CHURCH--HOW TO CONFRONT IT, HOW TO OVERCOME IT

Dr. Tia Noelle Pratt, Ph.D.
Reviewer: Patrick Markey, CPA, MBA (1.2 CPE, Behavioral Ethics - Non-Technical)

Recent events have exposed prevalent and recurring systems of injustice and racism in many structures of society in North America. Unfortunately, the Church is not immune to this history and its evil effects must be addressed. This session will explore the systems of racial inequality in the Church, the practical impact of it, and solutions to addressing to rooting it out of our structures and the life of the Church.

Learning Objectives: By the end of the program the participants will
1) Have a better understanding of systems of injustice and racism in the Church.
2) Know the often unknown history of the slavery and mistreatment of African descendants in the Catholic Church.
3) Have a greater understanding of the U.S. bishops pastoral statement on racism, “Open Wide Our Hearts.”
4) Have explored practical solutions for addressing systematic in Church structures.

SESSION XVI - FINANCIAL MANAGEMENT POLICIES AND THE VATICAN ISTITUTO PER LE OPERE DI RELIGIONE

Mr. Luca Saletti, Head of Customer Relations and Giovanni Boscia, CFO, Vatican Istituto per le Opere di Religione (IOR)
Reviewer: Tammy DiLorenzo, CPA (1.2 CPE, Finance - Technical)

Mr. Saletti and Mr. Boscia will discuss some of the latest reforms taking place at the Vatican bank, the Istituto per le Opere di Religione (IOR) and its mission in the Church.

Learning Objectives: By the end of the program the participants will
1) Have a greater understanding of international banking and accounting standards.
2) Know what the Istituto per le Opere di Religione (IOR), a.k.a., the Vatican Bank, is and how it operates at the service of the Universal Church.
3) Have solutions for transferring funds to assist the Church around the world (Financial Hub).
4) Have a greater understanding of the wonderful charitable work of the Church around the globe.

SESSION XVII - THE APPLICATION OF HRO PRINCIPLES IN DAILY OPERATIONS

Reviewer: Dcn. Aruna Silva (1.2 CPE, Business Management & Organization - Non-Technical)

Policies and procedures alone are not enough to prevent abuse from happening within an organization. While these are necessary steps to take, the overall organizational culture must strive to be one that reinforces prevention and promotes a culture of safety. High Reliability Organizations (HROs) implement five principles in their day-to-day operations. The airline industry, hospitals, and the military depend on their “preoccupation with failure” to protect customers and employees. The principles look at “deferring to the expert(s)” in dealing with the holes in the safety nets. All organizations need a culture of safety and well-being that anticipates “accidents or failures” that will occur, the resiliency to press forward with operations, and the resolve to contain and learn from these “accidents.” The Secretariat of Child and Youth Protection with the United States Conference of Catholic Bishops has a pilot program that is now in its Beta Phase of Training. Dioceses that have participated in the Alpha Phase see the value of HRO principles not just for the protection of children but in their daily endeavors in all departments and with all personnel.

Learning Objectives: By the end of the program the participants will
1) Learn how to identify key factors involved in creating a strong organizational culture.
2) Learn how to identify the principles of high reliability organizations.
3) Learn how to identify practical ways in which the principles of high reliability can be implemented in their daily operations.
THURSDAY, SEPTEMBER 17

2:00pm-3:00pm
CLOSING REMARKS/CONFERENCE WRAP-UP/AWARDS/EVENING PRAYER

3:00pm-4:00pm

4:00pm-5:00pm

5:00pm-6:00pm

2019 DFMC ANNUAL MEETING IN CHICAGO
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.

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).
Donald Borisch is the Diocesan Internal Auditor for the Diocese of Rockford, Illinois since July, 2006 when the Office of Internal Audits was launched. He was instrumental in developing the practices that are currently in use and provides all internal audit services for 105 parishes, 6 Catholic High Schools, and 27 ministries. Prior to that, he was the Fiscal Manager for Social Services at the Diocese, responsible for the financial operations of Catholic Charities and other social ministries in the Diocese of Rockford. He has been a facilitator of the Internal Audit Forum at the DFMC since 2007.

Mr. Borisch received his BBA in Finance from the University of Wisconsin at Oshkosh and an MBA from Northern Illinois University. He is married with three step-sons and is an active private pilot.

Donald Borisch Pre Conference Internal Audit Forum - English

Jorge Montenegro, Chief Financial Officer of the Catholic Diocese of San Bernardino, spent six years as financial external auditor for KPMG Peat Marwick in San Jose, Costa Rica. Later He became part of GBS Procter & Gamble accounts payable and internal audit team.

For three years was an auditor at Mission Foods based at Irving Texas, to later join the Diocese of Fort Worth as its first Internal Auditor, role that he performed over a period of five years then promoted to Controller, role that performed for another five years.

Jorge holds a Bachelor & Licentiate degree in Accounting from the University of Costa Rica, a Master of Business Administration (MBA) degree from the Instituto Tecnologico de Costa Rica and a master’s in science (MS) degree in Accounting from the University of Dallas, Texas.

He is a Certified Internal Auditor since 2005 and a Certified Public Accountant in Costa Rica since 1999.

Jorge Montenegro Pre Conference Internal Audit Forum - Spanish

Kathleen Hogan is an internal auditor and financial consultant for the Diocese of Joliet, Illinois, since April 2013. She received a Bachelor of Science degree in Accountancy from Northern Illinois University. She is a Certified Public Accountant and a Certified Diocesan Fiscal Manager.

Kathy Hogan Pre Conference Internal Audit Forum - English

Chris Stefanick is an internationally acclaimed author, speaker, and television host who has devoted his life to inspiring people to live a bold, contagious faith.

Recipient of the Papal Benemerenti Medal, Archbishop Charles J. Chaput calls Chris “one of the most engaging defenders of the Christian faith on the scene today.” Chris’s live seminars reach more than 85,000 people per year. His reality TV show, videos, and radio spots reach millions of people, and his educational initiatives are turning the tide in the Church. He authored the Chosen Confirmation program which has already formed more than 600,000 teens.

A graduate of Franciscan University of Steubenville, Chris is also the founder and president of Real Life Catholic, a non-profit which operates as the headquarters for Chris’s various initiatives.

Above all, Chris is proud to be the husband to his wife Natalie and father to their six children.

Chris Stefanick Session I, Keynote

FEATURED SPEAKERS
WILLIAM CANNY  Session II

William Canny is the Executive Director of the USCCB Migration and Refugee Services (MRS). Bill brings experience of over 25 years of service to the Catholic Church and to refugees and migrants through his previous positions at Catholic Relief Services (CRS) and the International Catholic Migration Commission, as well as strong skills as a leader and administrator. From 2010-2012, he served as CRS’ director of emergency operations, leading the emergency department in global prevention, preparedness, protection and response operations. Canny directed CRS’ initial response to the Haiti earthquake of 2010. He received an honorary doctorate in humane letters from the University of Scranton; a master’s degree in public health from the University of Pittsburgh; and graduated cum laude from the University of Scranton, with a bachelor of science degree in human services.

PETER L. DE KERATRY, CFRE  Session III

With more than 25 years of experience in fund development, Peter de Keratry has worked in a variety of professional settings beginning as a college student at Texas A&M where he served as Development Director for Saint Mary’s Catholic Center at Texas A&M and oversaw a $5 million campaign for new facilities while an undergraduate student. Following his time in College Station, de Keratry served a diverse group of organizations as a fundraising consultant, campaign director, and fundraising executive.

He has worked in parishes, dioceses, schools, associations, and a diverse array of non-profit settings including an international cultural center and museum built to honor Pope Saint John Paul II. In addition to extensive work in sustainable fund development roles, he has overseen campaigns with goals ranging from $1 million to $350 million.

He served as Campaign Director for The Citadel Foundation with responsibility for the planning and implementation of a $100 million campaign to fund endowments, facilities and operations at The Military College of South Carolina. In 1994, Peter became co-founder of Petrus Development and has advised numerous clients including the Vatican Observatory Foundation, Benedictine College, the University of Mary in Kansas and various Catholic ministry centers at large public and private universities.

From 2010 to 2014, Peter served as the Director of Resource Development for the Archdiocese of Brisbane in Australia. Then from 2014 to 2016 he served as Campaign Manager and Interim Director of Development for the Archdiocese of Chicago and its To Teach Who Christ is campaign. With a goal of $350 million, the campaign eventually raised more than $420 million in commitments.

Peter has been a speaker on a variety of fundraising topics including campaigns, major gifts, sustainable development programs, building a culture of cultivation, soliciting gifts, the case for support and other topics. He has been a speaker at several national and international conferences for the Association of Fundraising Professionals, the Fundraising Institute of Australia, the Italian Fundraising Conference, the International Catholic Stewardship Council, the National Catholic Development Conference, the Petrus Leadership Institute, and others.

In 2016, Peter and his family settled in Oklahoma City, Oklahoma where he serves as the Executive Director of Stewardship & Development. After raising 165% of the goal of the first comprehensive campaign in the diocese, he currently oversees all aspects of a multifaceted fund development program including annual giving, parish support, major gifts for projects, special events, and a State of Oklahoma tax credit program benefiting low-income students.

He is past chair of the Association of Fundraising Professionals’ International Development Committee and serves on the board of the International Catholic Stewardship Council. He has been a Certified Fund Raising Executive since 1999.

Peter graduated with a Bachelor of Arts degree in Speech Communication from Texas A&M University and completed a Master of Arts degree in Philanthropy and Development from St. Mary’s University of Minnesota. He resides in Oklahoma City, Oklahoma with his wife Colleen and their four children. He is an active member of the Order of Malta and volunteers in his local parish, with the Serra Club of Oklahoma City and with Sister BJ’s Pantry serving the homeless in Oklahoma City.

ARUNA SILVA  Session IV

Deacon Aruna Silva serves as the Chief Financial Officer for the Diocese of Las Vegas. In this capacity, Deacon Silva is responsible for the business services of the Diocese, including finance, investments, construction, employee benefits, property & casualty insurance, information technology, pension plans, the deposit & loan fund.

Prior to joining the Diocese, Deacon Silva was a Corporate Tax Director for two publicly traded companies and was also a Senior Tax Manager for KPMG, LLP. Deacon Silva is a California certified CPA (inactive), who holds Masters in Business Taxation from University of Southern California and a Bachelor of Science degree with a concentration in Accounting from the California State University of Northridge.

Deacon Silva is married to Nilakshi Helen and has two daughters – Nelisha (20) and Anisha (17). He was ordained as a Permanent Deacon in 2013 and serves at St. Elizabeth Ann Seton Catholic Church.
**KEITH PARSONS**  Session IV  

Keith Parsons is the Chief Operating Officer of the Archdiocese of Denver where he oversees the business aspects of the archdiocesan operations. Keith joined the Archdiocese in February 2015 as the Chief Financial Officer and served in that position until June 30, 2019 when he became the COO. He previously was a partner with PricewaterhouseCoopers LLP, an international, public accounting firm and prior to that worked in a variety of roles including a partner for RSM McGladrey, a senior manager with Deloitte & Touche, LLP, and the corporate controller with Crocs, Inc.

Keith is a graduate of Indiana University with a BS in business (accounting specialty). Keith currently lives in Golden, CO with his wife Angela and five children Mattea (14), Dominic (10), Ezekiel (9), Josiah (7) and Quentin (5) and is an avid trail runner.

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**DR. JOHN STAUD**  Session V  

Dr. John Staud serves as the Acting Director of the Institute of Educational Initiatives and Executive Director of the Alliance for Catholic Education and is a fellow of the Institute for Educational Initiatives. He also teaches courses on American literature in the English department. His scholarly activity has focused on the writings of Herman Melville.

Additionally, Staud is the principal author of the final report of the Notre Dame Task Force on Catholic Education and co-author of To Nurture the Soul of a Nation: Latino Families, Catholic Schools, and Educational Opportunity. He is the recipient of the Rev. William A. Toohey, C.S.C Award for Social Justice, the Joyce Award for Excellence in Teaching, and the Kaneb Teaching Award.

Staud did his undergraduate work at Notre Dame, graduating magna cum laude in 1987 with degrees in chemical engineering and English. Awarded a Mellon Fellowship in the Humanities, he completed his doctorate in English in 1992 at the University of Michigan, where he specialized in American literature. Prior to returning to Notre Dame, he taught British and American literature as an adjunct professor at Loyola University Chicago and at Jesuit high schools in Chicago and Denver.

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**DR. ERIN BARISANO**  Session V  

Dr. Erin Barisano is the Superintendent of Catholic Schools in the Diocese of Orange, CA. Prior to serving as superintendent, Dr. Barisano spent five years as an assistant superintendent and WCEA Elementary Commissioner in the Archdiocese of Los Angeles. She has served as a part-time faculty member in the Catholic School Leadership Academy at Loyola Marymount University where she earned her doctorate degree in Educational Leadership for Social Justice.

Dr. Barisano is a proud product of Catholic education. She earned her undergraduate degree from the University of Notre Dame and a masters degree in Catholic School Administration from Mount St. Mary's University, Los Angeles. Dr. Barisano's leadership and research interests consist of dimensions of spiritual leadership for Catholic school principals. She has presented at educational conferences across the country and is excited to actively lead and implement the Catholic Schools Sustainability Study in the Diocese of Orange. She is a member of Alpha Sigma Nu and Kappa Delta Pi and is the recipient of the Excellence in Educational Leadership Award from the University Council for Educational Administration.

Erin lives in Huntington Beach, CA. She and her husband, Bart, have been married for twenty-two years and enjoy a blessed life with their two children, Sophie and Casey.

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**CHRIS LOWNEY**  Session VI  

Chris Lowney currently vice chairs the board of CommonSpirit Health, one of America’s largest Catholic healthcare systems, with more than one hundred hospitals across twenty-one states. Chris, a onetime Jesuit seminarian, later served as a Managing Director of J.P. Morgan & Co. in Tokyo, Singapore, London, and New York before leaving the firm in 2001. He has authored six books, including the bestselling Heroic Leadership, which has been translated into eleven languages and is on the recommended reading list of the Commandant of the US Marine Corps. He has also authored Pope Francis: Why He Leads the Way He Leads; and, most recently, Everyone Leads: How to Revitalize the Catholic Church, which won a Catholic Press Association award. Chris was born in New York City, hates the Yankees, and is a long-suffering Mets fan. He graduated from Fordham University and holds seven honorary doctoral degrees (but has been manifestly incapable of actually earning one the old-fashioned way).
TOM GORDON  
Session VIII

Tom Gordon is the Chief Operating Officer at Catholic Extension. His responsibility is to ensure the organization is able to address the growing needs of the Catholic Church in America’s under-resourced communities. In this role, Tom provides the leadership to advance the vision of Catholic Extension as a national, vital voice and support system for mission dioceses in part by instituting a “best practices” model of fundraising, operations and management.

Tom has strong managerial credentials and broad-based business background that includes leadership roles in large corporations, entrepreneurial firms and small start-up companies. He has more than 30 years of experience in strategic planning, marketing, sales and finance.

Tom received his Bachelor of Arts and MBA in Marketing and Finance from the University of Illinois in Champaign-Urbana.

MATT HOCHSTEIN  
Session VIII

Matt Hochstein is Vice President of Client Services for Hagerty Consulting. Matt maintains over 20 years of management consulting experience working with clients across the Emergency Management, Financial Services, Health Care, and Technology sectors. Within Emergency Management, Mr. Hochstein has led engagements in both Hagerty’s Preparedness and Recovery divisions, including disaster recovery efforts for multiple FEMA Public Assistance and HUD CDBG-DR programs across a variety of hazards: hurricanes, floods and wildfires.

In the preparedness space, Mr. Hochstein served as Hagerty’s executive over the development of a recovery framework for California Office of Emergency Services (Cal OES). Previously, he led a 25+ person team in FEMA’s first multi-state/region catastrophic planning effort designing the disaster response strategy for four FEMA regions and eight states. At the time, the project was the largest pre-disaster planning effort in FEMA’s history.

Matt is a certified Project Management Professional (PMP) and completed the Homeland Security Exercise and Education Program (HSEEP). He received a Master of Business Administration from the Kenan-Flagler Business School, University of North Carolina, and a Bachelor of Arts, Government, from Wesleyan University (CT). He lives in Virginia with his wife and children.

DR. DIANE BARR  
Session IX

Dr. Diane Barr is completing her twelfth year as Chancellor of the Archdiocese of Baltimore where she oversees canonical and civil legal matters related to sexual misconduct of minors as well as the many administrative and ethical issues that relate to diocesan governance. She has been involved with canonical and civil cases of sexual misconduct since 1984 as a representative of the diocese, a diocesan investigator, an expert witness or as the canonical advocate for individuals who have been accused of misconduct.

Dr. Barr earned her Juris Doctorate Degree from the College of Law at the University of Idaho in Moscow before beginning her canonical studies at Saint Paul University in Ottawa where she was awarded a licentiate and later a doctorate in Roman Catholic Canon Law.

She is a member of the Idaho Bar Association. She served the Diocese of Boise in Idaho for twenty years in a number of positions including that of Director of the Office of Canonical Affairs. She also served for three years as a judge and the Moderator for the Tribunal of First Instance for the Archdiocese of Atlanta prior to beginning her work in Baltimore.

Dr. Barr has been a lecturer at Saint Paul University with a special emphasis on civil law issues for canon lawyers. She has served on the Board of Governors for the Canon Law Society of America and many of the organization’s various committees. She is also the author of many other articles on a variety of canonical subjects.

Dr. Barr has given presentations to various national and regional groups on issues such as the canonical rights of clergy and laity, due process, canonical financial processes, advocacy and sexual misconduct issues, as well matters of concern to pastoral ministers at the diocesan and parish levels. She continues to maintain a canonical private practice in tribunal and advocacy issues.
FEATURED SPEAKERS

**BEN LYTLE**  
*Session X*

Ben Lytle is a health care entrepreneur with a 55 year career. He is best known as founder, Chairman and CEO of Anthem, Inc.(NYSE), one of the nation’s largest health plans. He also founded took public, and sold Acordia, Inc.(NYSE), which became the world’s 7th largest insurance broker and today is part of USI, Inc. After Anthem, Mr. Lytle co-founded two companies with his son, Hugh: Axia, a prevention and wellness company, and Univita, a company focused on the care of complex illness in the home. He continues as an advisor in Hugh’s new venture, Equality Healthcare, a primary care delivery system focusing on demographic differences and complex care to vulnerable populations.

Ben has extensive public policy experience as Chairman of Indiana’s Healthcare Commission, Chairman of the Foundation for Better Health, as a member of President Clinton’s Commission on Consumer Protection and Healthcare Quality, and as board member of the American Enterprise Institute, one of the nation’s leading public policy organizations. Ben has provided testimony to Congress and state legislatures and advised state and federal executive branches of government.

Ben’s entrepreneurial leadership, innovative strategies, and writings have been noted in numerous publications. He has been active throughout his career as a speaker on health care policy, entrepreneurship, and strategic planning.

Mr. Lytle has served on numerous not for profit and 11 investor-owned Boards of Directors, frequently as Chairman or Lead Director. He is the recipient of numerous awards for civic and entrepreneurial leadership.

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**KYLE CAMPBELL**  
*Session XI*

Kyle Campbell joined CapTrust Advisors in Tampa in 2013. Kyle is currently a vice president, financial advisor responsible for providing investment advisory services to endowments, foundations, captive insurance plans, Taft-Hartley plans, and public pension plans. Kyle has worked in the industry since 2013. Kyle received a Bachelor of Science degree in financial from Stetson University. He also has a designation of Chartered Financial Analyst® (CFA), and Chartered Alternative Investment Analyst (CAIA).

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**KEVIN BARRY**  
*Session XI*

Kevin Barry is CAPTRUST’s chief investment officer and works out of the Raleigh, North Carolina, office. As CAPTRUST’s chief investment officer, Kevin leads the firm’s Investment team, the team responsible for investment manager due diligence, asset allocation, and discretionary investment management for CAPTRUST’s institutional retirement plan and wealth management advisory businesses. He is a lifelong student of the capital markets and also serves as a member of the Leadership Team.

Most recently, Kevin served as chief investment officer and senior portfolio manager for Third Law Capital Management in New York. There, he developed macroeconomic investment themes, conducted fundamental security analysis, and implemented asset allocation, hedging, and risk management solutions for clients. Previously, he was a partner and portfolio manager at Caxton Associates, a global macro hedge fund. He has more than 20 years’ experience in portfolio management, capital market strategy, and investment research.
STEPHEN SCHOTT  Session XI

Stephen Schott has over 35 years of experience in investment consulting. He advises to endowments, foundations, captive insurance plans, Taft-Hartley plans, and private and public pensions. He consults to CAPTRUST clients on investment policies, asset allocation, asset/liability analysis, and manager recommendation. Mr. Schott successfully merged the firm he founded; The Schott Group, with CAPTRUST in 2007 to become one of the firms’ current three managing principles. The combined firm creates a preeminent institutional consulting firm with very strong intellectual capital and capabilities. Mr. Schott worked on Wall Street in New York City in the 1980’s at Drexel Burnham Lambert. While continuing his consulting career, he moved to Cincinnati and served as the chief operating officer of the World Champion Cincinnati Reds from 1988-1991, overseeing all aspects of team management and representing ownership. He is a graduate of Denison University with additional studies in business and finance at Wamborough College in England. He furthers his professional development by continuous education and executive programs, for example, Investment Decisions and Behavioral Finance.

Outside the office, Mr. Schott has previously served as the chairman of the Board of the Schott Memorial Foundation and as a trustee of the Pope John Paul II Cultural Center. He is a member of the Investment Committee of the Catholic Relief Services and Sacred Heart Major Seminary Foundation, a board member of the Pro Football Hall of Fame, appointed as vice chairman of their National Advisory Board, and a member of the BCS Orange Bowl Committee.

Mr. Schott has joined the Board of Directors of the SET SEG Educational Foundation and has also served terms on the Boards of Northern Michigan Hospital Foundation, the Ohio Sports and Law Commission, St. Thomas University and Law School and the National Catholic Partnership on Disability. In recognition of his commitment to professional excellence and contributions to the community, Mr. Schott was chosen as one of Cincinnati’s outstanding Forty under 40 by the Cincinnati Business Courier in 1996. Mr. Schott has been a guest on CNBC and quoted in a variety of national publications such as USA Today, BusinessWeek and Forbes Magazine. He has also been interviewed as a guest on CNN Headline News’ Newsmakers Segment. He brings extensive experience in developing and overseeing investment programs.

The Religious Services Team lead by Stephen Schott was recognized in the top three of Barron’s Top 50 Institutional Consultants in 2019 and in the top five the previous year.

ROBBIE BACH  Session XII

Robbie Bach joined Microsoft in 1988 and over the next 22 years worked in various marketing, general management and business leadership roles. He played an important role as a marketing leader in the successful development of the Microsoft Office business, and subsequently led the creation and development of the Xbox business where he served as the Chief Xbox Officer. Bach retired from Microsoft in 2010 as the company’s President of the Entertainment and Devices Division.

Robbie now works as a Civic Engineer with corporate, philanthropic, and civic organizations who are driving positive change in our communities. He guest lectures extensively at a variety of colleges and universities and speaks to corporate, civic, and trade association audiences across the country. In 2015, he completed his first book, Xbox Revisited: A Game Plan for Corporate and Civic Renewal. For more information, see www.robbiebach.com.

As part of his civic commitment; Robbie serves on the national board of governors for the Boys and Girls Clubs of America and for the local Boys and Girls Club chapter in Bellevue, WA. He is also a member of the United States Olympic and Paralympic Committee board of directors, the board of directors for the Puget Sound chapter of Year-Up, and is Chair of the Board of the Bipartisan Policy Center in Washington, DC. His corporate responsibilities include being co-owner of Marin’s, Inc., a gluten-free pasta and flour company, and serving on the board of directors for Sonos Inc.

He was an Arjay Miller Scholar at the Stanford Graduate School of Business where he earned his MBA, and a Morehead Scholar at the University of North Carolina where he earned his degree in economics and was also named an Academic All-American on the Tar Heel’s tennis team.

ROBERT SEELIG  Sponsor Session XIII

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.

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RAY COOGAN  Session XIV
Ray Coogan began his career in Catholic Parish fundraising in 1997 when he joined Cunneen Parish Fundraising as the National Director. He remained with Cunneen until 2013 when they were purchased by the Cathedral Corporation. Ray remained with Cathedral until April of 2016 as the New England Director. In May of 2016, Ray joined Our Sunday Visitor as a Senior Campaign Consultant. His focus with OSV has been to introduce Capital Campaigns to the OSV suite of programs and services.
Ray has spent the last 23 years working in Catholic Parish Fundraising, serving hundreds of parishes across the country with Increased Offertory Programs, Capital Campaigns, Feasibility Studies and Pledge Redemption programs. Ray is very excited to be part of the OSV team to continue to serve the Church and provide capital campaign solutions to diocese and parishes across the country. Ray’s home is in Hamden, Connecticut where he resides with his wife, Denise, and their daughter Caitlin.
Ray holds a degree in Business Management from Central Connecticut State University.

DOMINGO BETANCOURT  Session XIV
Domingo Betancourt believes that a parish’s new building or renovation project is more than just brick and mortar. Rather, it is an act of praise and stewardship that invites parishioners to pray, participate and pledge as a reflection of their love of God and each other and to honor a gift to build or improve a place consecrated in His name.
Domingo is a Senior Consultant with Our Sunday Visitor’s Increased Offertory Solutions Division for the western region of the U.S. and specializes in bilingual Capital Campaigns, Feasibility Studies, Pledge Redemption Services and Increase Offertory Programs.
Prior to his work at Guidance in Giving, Domingo worked at John V. McCarthy and Associates in Southfield, MI.
With nearly 20 years of fundraising experience, Domingo has raised millions of dollars for Catholic parishes, schools and dioceses and specializes in working with communities of diverse cultures and languages. He is a member of the Association of Fundraising Professionals and resides with his wife Yolanda Betancourt, five children and three grandchildren in El Paso, Texas where they attend St. Frances Xavier Cabrini Parish.
He holds a Master’s in Business Administration from Webster University, St. Louis, MO.

DEACON BERNIE NOJADERA  Session XVII
Deacon Bernie Nojadera, executive director for the Secretariat for Child and Youth Protection, United States Conference of Catholic Bishops since 2011. He served as Director of the Office for the Protection of Children and Vulnerable Adults with the Diocese of San Jose, California from 2002 – 2011. He was a pastoral associate at St. Mary Parish, Gilroy, California (1987-2002). He was awarded a Bachelor of Arts degree from St. Joseph College, Mountain View, California, in 1984; a Master of Social Work degree specializing in Health and Mental Health Services from San Jose State University in 1991; and a Master of Arts in Theology from St. Patrick’s Seminary and University, Menlo Park, California, in 2002. He was ordained a permanent deacon in 2008. He has been a member of the Diocese of San Jose Safe Environment Task Force, involved with the San Jose Police Department’s Internet Crimes Against Children Task Force, the County of Santa Clara Interfaith Clergy Task Force on the Prevention of Elder Abuse, and the County of Santa Clara Task Force on Suicide Prevention. He has worked as a clinical social worker for Santa Clara Mental Health (1991-2000) and is a military veteran. He is married and has two children.
MR. WILLIAM BIGGS, CPA
Mr. Biggs is the Chief Financial Officer 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. 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 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.

MS. ELIZABETH JENSEN
Ms. Elizabeth Jensen the CFO for the Diocese of Orange. She also serves on the USCCB Accounting Practices Committee and the Audit Committee for the CA Conference of Catholic Bishops. Before joining the diocese she was an Audit Senior Manager for PwC.

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.

MR. JORGE MONTENEGRO, CIA
Mr. Montenegro is the Chief Financial Officer for the Diocese of San Bernardino. Before joining the Diocese of San Bernardino, he spent over ten years as internal auditor and then controller of the Diocese of Fort Worth. He is a Certified Internal Auditor since 2005 and a Certified Public Accountant in Costa Rica since 1999.

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. KEITH PARSONS, CPA
Mr. Keith Parsons is the Chief Operating Officer of the Archdiocese of Denver. Before being named to this position, he spent four and a half years as the archdiocesan CFO. Previous to that he worked in public accounting.

DCN. ARUNA SILVA
Dcn. Aruna Silva is the Chief Financial Officer for the Diocese of Las Vegas. Before joining the diocese he was a California Certified Public Accountant who has worked for a Big 4 Accounting Firm and two publicly traded corporations.

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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B113 ............................................ Baird Funds
B411 ............................................ Bloomfield Capital
B425 ............................................ Brown Advisory
B110 ............................................ Catholic Cemetery Conference
B108 ............................................ Catholic Investment Services
B117 ............................................ Catholic Mutual Group
B210 ............................................ Catholic Order of Foresters
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<td>Mr. Anthony Vercollone</td>
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<td>Mr. Eric Thomas</td>
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<td>925-790-2661</td>
</tr>
<tr>
<td>Baird Funds – Booth #113</td>
</tr>
<tr>
<td>Mr. Richard Whittow</td>
</tr>
<tr>
<td>Managing Director</td>
</tr>
<tr>
<td>777 E. Wisconsin Avenue</td>
</tr>
<tr>
<td>Milwaukee, WI 53202</td>
</tr>
<tr>
<td><a href="mailto:rwhittow@rbaird.com">rwhittow@rbaird.com</a></td>
</tr>
<tr>
<td>414-298-1081</td>
</tr>
<tr>
<td>Benefit Allocation Systems, LLC - GOLD BOOTH #200</td>
</tr>
<tr>
<td>Mr. Arthur Taylor</td>
</tr>
<tr>
<td>President/CEO</td>
</tr>
<tr>
<td>640 Freedom Business Ctr Dr, Ste 300</td>
</tr>
<tr>
<td>King of Prussia, PA 19406</td>
</tr>
<tr>
<td><a href="mailto:ATaylor@BASusa.com">ATaylor@BASusa.com</a></td>
</tr>
<tr>
<td>610-992-2500</td>
</tr>
<tr>
<td>Bloomfield Capital - Booth #411</td>
</tr>
<tr>
<td>Mr. Michael Lucci Jr</td>
</tr>
<tr>
<td>Director</td>
</tr>
<tr>
<td>280 N Old Woodward, Ste 104</td>
</tr>
<tr>
<td>Birmingham, MI 48009</td>
</tr>
<tr>
<td><a href="mailto:mlucci@bloomfieldcapital.com">mlucci@bloomfieldcapital.com</a></td>
</tr>
<tr>
<td>248-894-6888</td>
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<tr>
<td>BOK Financial - GOLD BOOTH #401</td>
</tr>
<tr>
<td>Ms. Christine Nowaczyk</td>
</tr>
<tr>
<td>Sr VP</td>
</tr>
<tr>
<td>16767 N Perimeter Dr, #200</td>
</tr>
<tr>
<td>Scottsdale, AZ 85260</td>
</tr>
<tr>
<td><a href="mailto:cnowaczyk@bokf.com">cnowaczyk@bokf.com</a></td>
</tr>
<tr>
<td>602-808-5332</td>
</tr>
<tr>
<td>Breckinridge Capital Advisors - GOLD BOOTH #202</td>
</tr>
<tr>
<td>Mr. Phillip Newell</td>
</tr>
<tr>
<td>Executive Vice President</td>
</tr>
<tr>
<td>125 High Street</td>
</tr>
<tr>
<td>Boston, MA 02110</td>
</tr>
<tr>
<td><a href="mailto:pnewell@breckinridge.com">pnewell@breckinridge.com</a></td>
</tr>
<tr>
<td>617-443-1120</td>
</tr>
<tr>
<td>Brown Advisory - Booth #425</td>
</tr>
<tr>
<td>Ms. Nicole Nesbitt</td>
</tr>
<tr>
<td>Head of US Institutional Sales and Service</td>
</tr>
<tr>
<td>9811 South Bond St</td>
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<tr>
<td>Baltimore, MD 21231</td>
</tr>
<tr>
<td><a href="mailto:nnesbitt@brownadvisory.com">nnesbitt@brownadvisory.com</a></td>
</tr>
<tr>
<td>443-827-3756</td>
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<td>CAPTRUST - PLATINUM BOOTH #302</td>
</tr>
<tr>
<td>Mr. Stephen H. Schott</td>
</tr>
<tr>
<td>Principal, Director</td>
</tr>
<tr>
<td>400 N Tampa St., #1800</td>
</tr>
<tr>
<td>Tampa, FL 33602</td>
</tr>
<tr>
<td><a href="mailto:Stephen.Schott@captrust.com">Stephen.Schott@captrust.com</a></td>
</tr>
<tr>
<td>919-870-6822</td>
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<tr>
<td>Catholic Cemetery Conference – Booth #110</td>
</tr>
<tr>
<td>David J. LaBarre, MA., M.S.</td>
</tr>
<tr>
<td>Executive Director</td>
</tr>
<tr>
<td>1400 S. Wolf Rd, Bldg #3</td>
</tr>
<tr>
<td>Hillside, IL 60162</td>
</tr>
<tr>
<td><a href="mailto:dilabarre@catholiccemetryconference.org">dilabarre@catholiccemetryconference.org</a></td>
</tr>
<tr>
<td>Office: 708-202-1242</td>
</tr>
<tr>
<td>Catholic Funeral &amp; Cemetery Services - PLATINUM BOOTH #203</td>
</tr>
<tr>
<td>Mr. Robert Seelig</td>
</tr>
<tr>
<td>CEO</td>
</tr>
<tr>
<td>4750 Willow Rd, Ste 200</td>
</tr>
<tr>
<td>Pleasanton, CA 94588</td>
</tr>
<tr>
<td><a href="mailto:rseelig@CFCSMISSION.ORG">rseelig@CFCSMISSION.ORG</a></td>
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<tr>
<td>925-965-2781</td>
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<tr>
<td>Catholic Investment Services - Booth #108</td>
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<tr>
<td>Mr. Tom Lanctot</td>
</tr>
<tr>
<td>CEO</td>
</tr>
<tr>
<td>200 State St</td>
</tr>
<tr>
<td>Boston, MA 02109</td>
</tr>
<tr>
<td><a href="mailto:info@catholicinvest.org">info@catholicinvest.org</a></td>
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<tr>
<td>617-758-6588</td>
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<tr>
<td>Catholic Mutual Group - Booth #117</td>
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<tr>
<td>Mr. Michael Intrieri</td>
</tr>
<tr>
<td>President &amp; CEO</td>
</tr>
<tr>
<td>10843 Old Mill Rd</td>
</tr>
<tr>
<td>Omaha, NE 68154</td>
</tr>
<tr>
<td><a href="mailto:mintrieri@catholicmutual.org">mintrieri@catholicmutual.org</a></td>
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<tr>
<td>800-228-6108</td>
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<tr>
<td>Catholic Order of Foresters - Booth #210</td>
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<tr>
<td>Mr. Gregory A. Temple</td>
</tr>
<tr>
<td>President &amp; CEO</td>
</tr>
<tr>
<td>355 Shuman Blvd</td>
</tr>
<tr>
<td>Naperville, IL 60566-7012</td>
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<tr>
<td><a href="mailto:gtemple@catholicforester.org">gtemple@catholicforester.org</a></td>
</tr>
<tr>
<td>630-983-4927</td>
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<tr>
<td>CBIS - GOLD BOOTH #405</td>
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<tr>
<td>Mr. Jeffrey McCroy</td>
</tr>
<tr>
<td>President &amp; CEO</td>
</tr>
<tr>
<td>125 S Wacker Dr</td>
</tr>
<tr>
<td>Chicago, IL 60606</td>
</tr>
<tr>
<td><a href="mailto:info@cbisonline.com">info@cbisonline.com</a></td>
</tr>
<tr>
<td>877-550-2247</td>
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<tr>
<td>Christian Brothers Services - GOLD BOOTH #402</td>
</tr>
<tr>
<td>Br. Michael Quirk, FSC</td>
</tr>
<tr>
<td>President &amp; CEO</td>
</tr>
<tr>
<td>1205 Windham Pkwy</td>
</tr>
<tr>
<td>Romeoville, IL 60446</td>
</tr>
<tr>
<td><a href="mailto:adelina.sklodowski@cbservices.org">adelina.sklodowski@cbservices.org</a></td>
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<td>630-378-3089</td>
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<tr>
<td>ClearPoint Federal Bank &amp; Trust - Booth #209</td>
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<tr>
<td>Ms. Ashlee Theising</td>
</tr>
<tr>
<td>President &amp; COO</td>
</tr>
<tr>
<td>100 Progress Dr</td>
</tr>
<tr>
<td>Batesville, IN 47006</td>
</tr>
<tr>
<td><a href="mailto:customer.service@clearpointfederal.com">customer.service@clearpointfederal.com</a></td>
</tr>
<tr>
<td>800-763-0234</td>
</tr>
</tbody>
</table>
CliftonLarsonAllen, LLP - Booth #116
Mr. Bill LeClaire
Principal
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320-203-5521

Conrad Schmitt Studios, Inc. - Booth #107
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Gallagher - GOLD BOOTH #403
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Graystone Consulting - Booth #211
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Greater Mission - Booth #410
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Innovest Portfolio Solutions - Booth #208
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Investing for Catholics - Booth #308
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Knights of Columbus Asset Advisors - Booth #407
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Manning & Napier - Booth #408
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Morgan Stanley Consulting Group - Booth #307
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National Investment Services, Inc. - Booth #205
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Notre Dame Federal Credit Union - Booth #207
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Prenger Solutions Group - Booth #212
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PrimePay - Booth #406
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Sage Intacct - GOLD BOOTH #201
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Serenic Software - Booth #111
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SGIA Medicare Consulting Inc. - Booth #417
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The Concord Advisory Group, Ltd. - Booth #419
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The Matthias Group LLC - Booth #311
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The Sulzer Group - Booth #309
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631-423-9500
The DFMC would like to offer a special thanks to the following organizations whose scholarships made it possible for many DFMC members to attend the 2020 50th anniversary virtual meeting!

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PrimePay
The concept of a conference for people involved in the financial management of Catholic dioceses developed during an informal gathering of six diocesan finance officers at the National Catholic Stewardship Conference in Denver, Colorado in 1969. The first conference was held the following year in Denver with 40 priests, 30 laymen and 1 Bishop in attendance. This was soon after Vatican II and the concept of positions of authority within the church was still unique.

In 1988, the thrust began to broaden the base of involvement and participation. A study was conducted to discover new ways for the Conference to be responsive to the changing needs of membership. Organizationally, the DFMC restructured with a Board of Directors, which would geographically and numerically represent the membership. The offices of President, Vice President and Secretary-Treasurer were established. A National Office was opened in Lilburn, Georgia headed by an Executive Director. The National Office was seen as an on-going help to the Board of Directors, especially in the operation of the annual Conference and the publication of the quarterly newsletter, “The Herald”.

The Conference has come a long way from the “group of six” to now represent 214 dioceses and eparchies from the United States, Canada, the Caribbean and Pacific. Membership has grown markedly with laity now representing 91% of the DFMC fiscal professionals with priests, women religious and deacons comprising the remaining balance. Lay women represent 38% of total DFMC membership.

Beginning in 2009, the DFMC began formally recognizing the professional specialized field of study inherent in diocesan fiscal management by offering a voluntary certification designation, “Certified Diocesan Fiscal Manager,” CDFM covers sixteen (16) disciplines uniquely applicable to diocesan fiscal management viewed as a ministry. Qualified applicants can sit for a comprehensive examination consisting of 4 sections of 50 multiple choice questions each. A study guide and further information is available through the National Office.

As it begins its 50th year of service to the Church, the ministry of the DFMC continues to proactively encourage and facilitate the growth and development of “Faith Filled Professionals.” It assists diocesan accounting and finance personnel in bringing their unique financial skills and expertise to promote transparency, accountability, and best practices to the service of their local and the national Church.
<table>
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<tr>
<th>Date Range</th>
<th>Year</th>
<th>City</th>
<th>Hotel / Resort</th>
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<td>October 13-16, 1970</td>
<td>1970</td>
<td>Denver</td>
<td>Radisson Hotel</td>
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<td>October 11-13, 1972</td>
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<td>Minneapolis</td>
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<td>October 15-17, 1973</td>
<td>1973</td>
<td>Orlando</td>
<td>Howard Johnson-South</td>
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<td>October 21-23, 1974</td>
<td>1974</td>
<td>Carson City</td>
<td>Ormsby House</td>
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<td>October 01-04, 1975</td>
<td>1975</td>
<td>San Antonio</td>
<td>Hilton Palacio del Rio</td>
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<td>October 24-27, 1976</td>
<td>1976</td>
<td>Boston</td>
<td>Sheraton Boston Hotel</td>
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<td>October 05-08, 1977</td>
<td>1977</td>
<td>Chicago</td>
<td>Hyatt Regency</td>
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<td>October 14-17, 1979</td>
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<td>1983</td>
<td>Phoenix</td>
<td>The Pointe Resort</td>
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<td>Charleston</td>
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<td>New Orleans</td>
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<td>Portland, ME</td>
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<td>Hyatt Regency</td>
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<td>September 28-October 2, 1996</td>
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<td>Hyatt Regency Minneapolis</td>
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<td>September 30-October 03, 2001</td>
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<td>St. Louis</td>
<td>Adam’s Mark</td>
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<td>September 22-25, 2002</td>
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<td>Denver</td>
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<td>September 28-October 01, 2003</td>
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<td>Hyatt Regency Embarcadero</td>
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<td>September 16-19, 2007</td>
<td>2007</td>
<td>Philadelphia</td>
<td>Sheraton Philadelphia City Center</td>
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<tr>
<td>September 28-October 1, 2008</td>
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<td>Miami</td>
<td>Hyatt Regency Miami</td>
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<tr>
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<td>2009</td>
<td>Chicago</td>
<td>Hyatt Regency Chicago</td>
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<td>September 26-29, 2010</td>
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<td>New Orleans</td>
<td>Sheraton New Orleans</td>
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<td>Saint Paul/Minneapolis</td>
<td>Hyatt Regency Minneapolis</td>
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<td>Hilton Americas-Houston</td>
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<td>Sheraton Grand Phoenix</td>
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<td>September 29-October 2, 2019</td>
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**SEPTEMBER 14-17, 2020**

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<th>Date Range</th>
<th>Year</th>
<th>City</th>
<th>Hotel / Resort</th>
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<td>2021</td>
<td>Nashville, TN</td>
<td>Gaylord Opryland Resort</td>
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Mount 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.

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PLEASE NOTE THAT SPEAKER HANDOUTS ARE CONVENIENTLY POSTED IN THE “MEMBERS ONLY” AREA OF OUR DFMC WEBSITE: www.dfmconf.org
Thank you for becoming part of this unique opportunity by joining other DFMC members as we gather for our annual meeting.

Join us virtually for the DFMC Virtual Annual Meeting September 14–17, 2020