

Mennonite Education Agency Investment Committee Members

Barry Bartel (secretary) has practiced law for half of his career, currently as a trial lawyer with Chipman Glasser LLC in Denver, Colorado. He also provides consulting services for organizations through Bartel Solutions LLC. He is a graduate of Bethel College (Kansas) and Willamette University College of Law. He has also served as President of Bethel College and with Mennonite Central Committee as Country Representative in Bolivia and as rural program coordinator in Haiti, and as Executive Director of the Ecumenical Project for International Cooperation. He also served as part-time Coordinator for the Conference Minister Team of Mountain States Mennonite Conference. He brings his commitment to the church and analytical skills developed in law practice and leadership positions to the unique issues faced by the MEA Investment Committee. He is a member of Glennon Heights Mennonite Church, Lakewood, Colorado. (3rd term ending 2025)

Chad Horning (chair) As Chief Investment Officer at Everence (2008-present), he leads the investment team that manages corporate assets, client portfolios, and Praxis Mutual Funds, for which he serves as President (2014-present). Prior to his leadership roles, he served as a portfolio manager of various active and index equity portfolios for Everence and its predecessor company, Mennonite Mutual Aid (1999-2013). He was a board member of the Christian Investment Forum (2014-2020) and a member of the board of reference for the Center for Sustainable Climate Solutions (2018-present) and was a board member of Meritas Mutual Funds (2009-2010). He is often called on to discuss investments, financial markets and the economy with financial advisors and their clients. He is a graduate of Goshen College and the University of Maryland and is a CFA® charterholder. He attends Waterford Mennonite Church, Goshen, IN. (1st term ending 2022)

Christine Jantz is the founder of Jantz Management (2002-present) and currently serves as CEO. She is the former CIO of NorthStar Asset Management of Boston. She is a graduate of Bethel College (BA), the University of Iowa (MS) and MIT Sloan (MBA) and, she is a Chartered Financial Analyst®. In her career as an investment professional, she has focused on the development of quantitative ESG/SRI strategies; developing the first quantitative strategy to incorporate KLD data (pre-cursor to ESG) in a bespoke product for Everence (then MMA, 2006). At Jantz Management, she brought the first shareholder proposals asking firms to report on their non-financial humanitarian philanthropy in response to the Ebola crisis and, she created the first shareholder proposal asking firms to report on the feasibility of setting a net-zero GHG emissions goal in order to highlight the need for a greater commitment to mitigating climate change. Her mission of creating change at NorthStar was not only through shareholder engagement, but also at the firm with the hiring and development of a portfolio management team comprised of a majority of women of color in analytical and quantitative roles. Her membership in the Mennonite Church is through the Calvary Mennonite Church in Liberal, Kansas. (1st term ending 2023)

John L. Liechty is Founder and Principal of Integrated Financial Planning Solutions, LLC. He is a graduate of Bluffton University and is a CERTIFIED FINANCIAL PLANNER™ and a Chartered Financial Consultant. He worked 32 years at Mennonite Mutual Aid (MMA), retiring in 2008 as senior vice-president of financial services and president of Praxis Mutual Funds. In 2017, he concluded a 14-year term of service as a trustee of Bluffton University and currently serves as board chair of the Pax World Funds. He also serves as Chair of the Community Foundation of Elkhart County's Investment Committee. He brings 45-years of financial service and investment experience. He is a member of Eighth Street Mennonite Church, Goshen, Indiana. (3rd term ending 2023)

Bart Miller Bart has spent 20+ years in financial supervision and regulation with the Federal Reserve Bank (Boston, Washington DC, Chicago) specializing in capital markets activities, interest rate risk, and liquidity & balance sheet management. Bart took a hiatus from the Fed from 2014-2018 to serve as the Managing Director of Liquidity & Funding at BMO Harris Bank. He is a graduate of Goshen College (B.A. Economics) and Brandeis University (M.A. International Economic & Finance) with additional graduate work at Instituto Tecnológico Autónomo (Mexico). He holds the Chartered Financial Analyst designation. Bart is a member of the board of Goshen College and attends Lombard (Illinois) Mennonite Church. (3rd term ending 2022).

JB Miller is a graduate of Eastern Mennonite University (BS social science) and Wake Forest University (MBA). He worked at Everence (vice-president of investment services, led the development and was the first president of Praxis Mutual Funds). He retired from Everence in 2014. Prior to joining Everence he was senior vice-president of Citizens and Southern Bank (Sarasota, Florida). He is a board member of Lake Institute on Faith and Giving at the Lilly School of Philanthropy (IUPUI) and Eastern Mennonite University Board of Trustees. He is an adjunct instructor with the Sarasota County Schools, and a member of Covenant Mennonite Fellowship in Sarasota, FL. (2nd term ends 2024)

Susan Taylor is a partner with Just Money Advisors (JMA, justmoneyadvisors.com), a financial planning and investment management practice specializing in socially responsible and community investing strategies. She also serves on the investment committee of JMA's RIA, Natural Investments, LLC. Prior to this she was an economist with Corporate Treasury at Bank of America. She is also a writer on the intersections of faith and money, writing for Faith and Money Network and other groups. Susan received a B.A. in Journalism and Business Administration from Western Kentucky University (Bowling Green, KY) and a Ph.D. in Economics from the University of Maryland (College Park, MD). She serves on the board of directors for Faith and Money Network and Bartimaeus Cooperative Ministries and is an active member of her Anabaptist congregation in Louisville, KY. (1st term ending 2022)

Katie Villegas (vice-chair) is a financial advisor with Old Peak Finance. She is a CERTIFIED FINANCIAL PLANNER™ professional and has been working in the financial planning and community investment field for over 8 years. As a Chartered SRI Counselor™, Katie is particularly interested in sustainable investing practices and provides expertise to clients interested in aligning their investments with their values. Prior to her current role, she was director of campaign planning and operations at Duke University. She has a bachelor's degree from Westmont College in Santa Barbara, CA, and a master's in international relations from the American Graduate School in Paris. Katie is currently enrolled in the Collaborative MBA program through Bluffton University. Katie volunteers with the VITA program, providing free tax assistance to those in the community. She is a member of Chapel Hill (North Carolina) Mennonite Fellowship. (2nd term ending 2023)

Aaron Ziulkowski is a manager of ESG integration at Boston Trust/Walden Asset Management. He is a graduate of Westmont College (BA in history and minor in Spanish) and George Washington University (MA in Latin American Studies). He holds the Chartered Financial Analyst® designation and Fundamentals of Sustainability Accounting (FSA) Credential and is a member of CFA Society Boston and the CFA Institute. Prior to his current position at Walden, he worked at Ceres, Pact Inc., the Organization of American States and the World Bank. He has experience developing multi-stakeholder solutions to global environmental and social challenges, including work in Africa, Asia, and Latin America. He is a member of the Mennonite Congregation of Boston and currently serves on the finance and investment committee and the church council. (2nd term ending 2025)

Roy Williams (Mennonite Education Agency treasurer and ex-officio member of the Investment Committee) is a pastor of College Hill Mennonite Church since 1985. He has been on several church boards and community organizations. Roy was a former bank executive primarily in auditing and real estate and commercial lending.

Consultants: Mercer Investment Consulting, Norwalk, Connecticut

Christine Bradford is Senior Not-for-profit Investment Consultant at Mercer. Based in Mercer's Norwalk, Connecticut office, she brings more than 30 years of financial investment experience as an investment consultant, corporate plan sponsor, and investment manager. Her focus is on asset allocation, manager selection and ESG integration. Christine currently manages relationships with a diverse group of clients, which include endowments, foundations, faith-based pools, and high-net-worth trusts. She specializes in working with clients, both advisory and OCIO, with mission-based and responsible investing mandates. Her focus is on asset allocation, manager selection and ESG integration. Christine is the Not-for-Profit Regional Segment Leader for Mercer's East Market. She is a member of Mercer's Endowment & Foundation Strategic Research Team, which is responsible for thought leadership on portfolio management focus, intellectual capital development, process improvement and business development. Christine is also a member of Mercer's North America ESG Strategic Research Team. Christine holds a BA from Rutgers College. She is a member of the recruitment committee for Mercer's Racial & Ethnic Diversity Business Resource Group as well as volunteers with MercerCares.

Theresa Allgaier is a consultant at Mercer Investment Consulting. She earned her MBA from the University of New Haven and her BA in Mathematics from Western New England College. She has over 15 years of experience in the investment consulting industry. She serves client relationships that are diversified by type and size and include endowments and foundations, corporate defined benefit and defined contribution plans. She works closely with clients in the development of investment policies and objectives, evaluates investment structures, conducts asset allocation modeling, monitors plan performance, and researches and selects investment managers.

Greg Karsky is a Senior Investment Consultant in Mercer's Not-for-Profit Wealth business. Based in Mercer's Norwalk, Connecticut office, Gregory brings more the 15 years of experience working with clients in both a traditional advisory relationship and OCIO (outsourced CIO) framework. In addition to his client responsibilities, he is a member of Mercer's ESG strategic research team, which is responsible for develop intellectual capital and providing strategic guidance in developing an environmental and sustainability investing framework for Mercer's clients. Prior to joining Mercer, Gregory's professional experience includes serving as a portfolio analyst and investment strategist with Bank of America Global Wealth Management and most recently with Spruce Hill Capital, an independent RIA. As a portfolio analyst, Gregory specialized in tactical asset allocation and portfolio construction for high-net-worth individuals and midsize institutions. Gregory graduated from Bentley University with a BA in finance and is currently a CFA level II candidate.

MEA Staff

Lisa Heinz is Senior Director of Operations and Chief Financial Officer of Mennonite Education Agency. She is a graduate of Goshen College (BA in accounting). She is a member of Berkey Avenue Mennonite Fellowship, Goshen, Indiana where she currently serves as an elder.

MEA Investment Committee Assistant

Vyron Schmidt is a Charitable & Church Relations Consultant for Everence. He is a graduate of Bethel College (Newton, KS), AMBS and Chicago Theological Seminary. He also earned the chartered financial consultant (ChFC) and chartered advisor of philanthropy (CAP) certifications from the American College. He is a member of Waterford Mennonite Church.