Mennonite Education Agency Investment Committee Members

Barry Bartel is Executive Director for the Ecumenical Project for International Cooperation (EPIC), working from his home west of Denver and partnering with local organizations in Latin America. He also serves as part-time Coordinator for the Conference Minister Team of Mountain States Mennonite Conference. He is a graduate of Bethel College (Kansas) and Willamette University College of Law. He has practiced law for half of his career, most recently as a trial lawyer with Holland & Hart LLP in Denver, Colorado. 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. 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. (2nd term ending 2020)

Chad Horning 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 was a portfolio manager of various active and index equity portfolios for Everence and its predecessor company, Mennonite Mutual Aid (1999-2013). He is treasurer of the Christian Investment Forum (2014-present) 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).

Christine Jantz is a co-founder of Jantz Management (2002-present) and currently serves as CEO. She is also the 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 has not only been through the shareholder process, 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 (chair) 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 is also a member of the Community Foundation of Elkhart County's Investment Committee. He brings 42-years of financial service and investment experience. He is a member of Eighth Street Mennonite Church, Goshen, Indiana. (3rd term ending 2021)

Bart Miller served as the managing director of Liquidity and Funding Management at BMO Harris Bank (2014-2018). He is a graduate of Goshen College and Brandeis University with additional work at Instituto Techologico Autonomo (Mexico). He worked for the Federal Reserve Bank (1995-2014) as a senior bank examiner and liquidity risk specialist. He is a Chartered Financial Analyst (2000). He is a member of Lombard (Illinois) Mennonite Church. (3rd term ending 2020)

JB Miller (vice chair) 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 MEDA Sarasota Chapter. He has served on various boards including several educational institutions. He has senior management experience as a financial services executive. He has expertise in developing and implementing business and strategic plans along with having a broad knowledge of investment and other financial services products. He is an advocate for Mennonite/Anabaptist education and is a member of Covenant Mennonite Fellowship in Sarasota, FL. (1st term ends 2020)

Susan Taylor is a partner with Just Money Advisors which specializes in socially responsible and community investing options. Prior to this she was an economist with the Corporate Treasury at Bank of America. She is also a writer on the intersections of faith and money, writing for Faith and money Network, the newsletter of Natural Investments, LLC, *Presbyterians Today* and *Sojourners*. 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 is currently Vice-President of the Faith and Money Network and is on the fundraising advisory committee of Bartimaeus Cooperative Ministries. She is a member of the Baptist Peace Fellowship of North America. (1st term ending 2022)

Katie Villegas is a financial advisor with Old Peak Finance. She is a CERTIFIED FINANCIAL PLANNER™ and has been working in the financial planning and community investment field for over 6 years. 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 volunteers with the VITA program, providing free tax assistance to those in the community, and is on the board of Student Action with Farmworkers, a local non-profit. She is a member of Chapel Hill (North Carolina) Mennonite Fellowship. (1st term ending 2019)

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. (1st term ending 2021)

Linwood Rush is a retired regional hospitality services director for the Portland service area of Providence Health and Services. He is currently a volunteer tax preparer for the AARP Tax Aide program. He has served as treasurer of Portland (Oregon) Mennonite Church as well as being the finance chair of the Church Building Task Force. He has served as a church conference delegate and as a member of the Pacific Northwest Mennonite Conference Finance Advisory Task Force. He has been a board member of the Oregon chapter of Healthcare Foodservice Administrators and Western Mennonite School (five years as chair). He has also served as treasurer for Sunnyside Mennonite Montessori School (Portland, Oregon). As treasurer of the Mennonite Education Agency Board of Directors, he is an ex-officio member of the Investment Committee. He is a member of Portland Mennonite Church.

Consultants: Mercer Investment Consulting, Norwalk, Connecticut

Christine Bradford is Senior 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 is a voting member of Mercer's Endowment & Foundation Investment Committee, which is responsible for approval of asset allocation and manager selection decisions for Mercer's discretionary endowment and foundation client portfolios as well as setting strategic guidance and developing Intellectual Capital to assist all endowment and foundation clients. She is also a member of Mercer's North America ESG Strategic Research Team. Christine holds a BA from Rutgers College. She is on the Norwalk Steering Committee for the Women@Mercer 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.

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 serves on the Stewardship and Finance Commission.

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.