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 is 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® charter holder. He attends Waterford Mennonite Church (Goshen, IN).

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 2020)

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 earned a certificate of financial planning through Duke University, has passed the CFP exam and is a candidate for CFP certification. 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 a Principal Senior Consultant of Mercer Investment Consulting. She is a graduate of Rutgers University (BA). She has held positions in investment consulting, investment management, and retirement plan administration. She has worked as a benefits consultant to the Perkin-Elmer Corporation, as vice-president at Mellon Bank, and as a senior pension officer for the Continental Can Company and the Continental Group's retirement plans. She has over 25 years of investment experience. She manages a diverse client base including foundations, endowments, corporate retirement funds, healthcare systems, faith-based organizations, and high-net-worth trusts.

Ellen Petrino is a Principal Senior Consultant at Mercer Investment Consulting. She is a graduate of Mount Holyoke College (AB) and New York University Stern School of Business (MBA in finance). She was a founding partner of Evaluation Associates (acquired by Mercer Investment Consulting in 2011) and a vice-president at Paine Webber Jackson & Curtis. She has over 30 years of experience in investment consulting and investment manager research. Her client base includes foundations, endowments and pension funds ranging in size from $50 million to $2 billion plans.

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 as chair of Stewardship and Finance.

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.