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 currently exploring her creative side as an emerging artist (2022 - present). A founder and CEO of Jantz Management, she is retiring in 2022. Her career in investment management included positions of Chief Investment Officer at NorthStar Asset Management of Boston, Investment Analyst at GMO and AVP at Putnam Investments. She is a graduate of Bethel College (BA), the University of Iowa (MS) and MIT Sloan (MBA) and, she is a Chartered Financial Analyst®. At Jantz Management, she developed the firm's 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). In 2016 at Jantz Management, she created a groundbreaking Net-Zero GHG emissions shareholder proposal paving the way for numerous similar proposals. Her mission of creating change at NorthStar was not only through shareholder engagement, but also within the firm; hiring a portfolio management team comprised of women of color. Her membership in the Mennonite Church is through the Calvary Mennonite Church in Liberal, Kansas. (1st term with MEA is 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)

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. Formerly an economist with Corporate Treasury at Bank of America, she writes on the intersections of faith and money for publications by Sojourners, Faith and Money Network, United Methodist Women, and others. 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 (vice-president) and Bartimaeus Cooperative Ministries (chair) and is an active member of her Anabaptist congregation in Louisville, KY. (2nd term ending 2026)

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)

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.

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. (2nd term ending 2025)

Hannah Roth is a Regional Director at Dimensional Fund Advisors where she is responsible for developing relationships with large, complex national RIAs. In this role, she consults with advisors and investment teams on asset allocation, practice management, and client communication. Prior to joining Dimensional, Hannah was an English language teacher, working with students both in the United States and Spain. Hannah holds an MBA and Master of Finance from the University of Iowa and a BA in Education from Goshen College. She and her husband live in Austin, Texas.

Everence staff

Taylor Caouette is an Investment Administrator and MEA Investment Facilitator at Everence as of December 2021. Before Everence, she worked at RSM as a tax accountant for 3 years and at Bennington Marines as an HR Administrative Assistant for 6 years. She is a 2017 graduate of Goshen College (BA in Accounting).

Consultant: Mercer Investment Consulting, Norwalk, CT

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-networth 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 Principal in the Norwalk, CT office of Mercer's Wealth business. Theresa serves corporate defined benefit and defined contribution plans, endowments and foundations. She is responsible for providing consulting advice to help plan sponsors manage risks and to enhance employees' retirement outcomes. She assists clients with the development of investment policies and objectives, evaluating investment structures, conducting asset allocation modeling, monitoring plan performance, and researching and selecting investment managers. Theresa has more than 20 years of experience having joined Mercer in July 2011 following the acquisition of Evaluation Associates. Theresa holds a BA in Mathematics from Western New England College and an MBA from University of New Haven.

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.