Mennonite Education Agency Investment Committee Members:

Chad Horning (chair) As Chief Investment Officer and Senior Vice President 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 currently serves as a director of MEDA Canada and was previously a director of the Christian Investment Forum (2014-2020) and a member of the board of reference for the Center for Sustainable Climate Solutions (2018-2022). 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 **is a member at** Waterford Mennonite Church, Goshen, IN. (**2nd** term ending **2026**)

Katie Villegas (vice-chair) is a CERTIFIED FINANCIAL PLANNER™ professional and has been working in the financial planning and community investment field for over a decade. 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 role as a financial advisor, she was director of campaign planning and operations at Duke University. She has a bachelor's degree from Westmont College in Santa Barbara, CA, a master's in international relations from the American Graduate School in Paris, and an MBA from the Collaborative MBA program through Bluffton University. She is a board member of Goshen College and a member of Chapel Hill (North Carolina) Mennonite Fellowship. (**3rd** term ending **2027**).

Hannah Roth (secretary) holds an MBA and Master of Finance from the University of Iowa and a BA in Education from Goshen College. She was most recently a Regional Director at Dimensional Fund Advisors where she was responsible for developing relationships with national RIAs. In this role, she consulted with advisors and investment teams on asset allocation, practice management, and client communication. She and her family live in Pittsburgh. (**1st** term ending **2026**).

Susan Taylor is a co-owner of Just Money Advisors (JMA, justmoneyadvisors.com), specialists in socially responsible and community investing strategies. She serves on the investment committee of JMA's RIA, Natural Investments, PBLLC, a Perpetual Purpose Trust for whom Susan is the Trust Enforcer. Formerly an economist with Corporate Treasury at Bank of America, Susan earned a Ph.D. in Economics from the University of Maryland (College Park, MD). Susan has spent her adult life exploring the intersections of faith and money. She shares time and that experience as a member of the board of Trustees of Eastern Mennonite University and the boards of Faith and Money Network (vice-president) and Bartimaeus Cooperative Ministries (chair). Susan is an active member of her Anabaptist congregation in Louisville, KY. (**2nd** term ending **2026**)

Christine Jantz is an abstract artist (2022 - present). She retired from Jantz Management 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. Christine consults on projects on an ad hoc basis. She is a graduate of Bethel College (BA), the University of Iowa (MS) and MIT Sloan (MBA) and, she is a Chartered Financial Analyst. Her membership in the Mennonite Church is through the Calvary Mennonite Church in Liberal, Kansas. (**2nd** term ending **2027**).

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 member of the Eastern Mennonite University Board of Trustees, and an adjunct instructor with the Sarasota County Schools and serves on the Sarasota County Historical Commission. He is a member of Covenant Mennonite Fellowship in Sarasota, FL. (**2nd** term ends **2024**)

Aaron Ziulkowski is a Portfolio Manager of ESG integration at Boston Trust Walden. He is a graduate of Westmont College (BA in history and minor in Spanish) and The 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 Boston Trust Walden, he worked at Ceres, Pact Inc., the Organization of American States and the World Bank. He is a member of the Mennonite Congregation of Boston. (**2nd** term ending **2025**)

Aaron Wieand is a partner at Integrated Financial Planning Solutions, LLC. He is a graduate of Goshen College and is a CERTIFIED FINANCIAL PLANNER™ (CFP®), Personal Financial Specialist (PFS), and Certified Public Accountant (CPA). Prior to joining Integrated Financial Planning Solutions, Aaron was a Division Controller for Patrick Industries, a publicly traded RV supplier, and a Lead Strategic Finance Analyst for Cambia Health Solutions, a non-profit health and wellness organization serving members in the Pacific Northwest. Aaron serves on the board of directors for Bashor Children's Home and is a member of Berkey Avenue Mennonite Fellowship (Goshen, Indiana), where he is a member. (**1st** term ending **2027**).

Mennonite Education Agency Staff:

Janice Eigsti Miller is Chief Financial Officer of Mennonite Education Agency (2022-present). She is a graduate of Goshen College and a former CPA (license inactive). She worked for the accounting firm RSM from 2001 - 2006 full time and again from 2017 - 2021 on a part time basis serving primarily not-for-profit and manufacturing clients. She worked for Bethany Christian Schools as the business manager from 2006-2012. Since 2013 she has served at Pathways Retreat, a spiritual retreat center in Goshen, IN, in various leadership and finance roles and is currently a member of the finance committee. She is a member of Walnut Hill Mennonite Church in Goshen, IN.

Everence Staff:

Taylor Hochstedler 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:

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.