

Speaker Bios

Investor Conference 2014



THE REV. DR. JIM ANTAL

Conference Minister & President — Massachusetts Conference

The Rev. Dr. Jim Antal serves the Massachusetts Conference of the United Church of Christ as the Conference Minister and President, providing instrumental leadership in the areas of the environment and climate change. He recently authored the UCC resolution to divest from fossil fuel companies, which passed at UCC's 2013 General Synod and became a historic first for a US religious denomination. The Rev. Dr. Antal also provides guidance for the Massachusetts Conference Environmental Ministries group and regularly convenes the New England Regional Environmental Ministries representatives from the six New England UCC Conferences. With over 30 years in ministry, he speaks frequently in churches throughout the US on the essential role people of faith must play to counter climate change. The Rev. Dr. Antal graduated Magna Cum Laude from Princeton University in 1972, Cum Laude from Yale Divinity School in 1978, and holds a PhD in Ministry from Andover Newton Theological School.

THE REV. GEOFFREY BLACK

General Minister & President — United Church of Christ

Prior to being elected as the General Minister and President of the United Church of Christ, the Rev. Geoffrey Black held several ministerial roles within the UCC. The Rev. Black also served as assistant chaplain at Brown University, associate minister at St Albans Congregational UCC in Queens, Lecturer in the Field Education Department at Union Theological Seminary in New York City, and Protestant chaplain at Adelphi University. During his tenure as a local church pastor, the Rev. Black was active in Association and Conference life, serving on several committees and holding a number of elected offices. Ecumenical commitment, concern for equal justice, African-American empowerment, and community improvement have shaped his ministry in the church and in the communities in which he has lived. This resulted in the Rev. Black's work with organizations such as the Nassau Coalition for Safety and Justice, The Long Island Interracial Alliance for a Common Future, and the Amistad Cultural Center of Long Island — which he co-founded.

MICHAEL DE GUZMAN

Senior Research Analyst — United Church Funds

Mr. Michael de Guzman launched his career at the Controllershship Group of the leading default mortgage solutions provider and then worked for two years in real estate investment banking. He went on to work as an analyst for a long/short equity hedge fund covering energy and energy services companies. Mr. de Guzman graduated with a BA in History from Dartmouth College and an MBA from Columbia Business School. While at Columbia, he served as Teacher's Assistant for Capital Markets, EMBA Corporate Finance and Global EMBA Corporate Finance. Mr. de Guzman also coauthored a case study which is now a part of the Core Corporate Finance curriculum. He currently serves on the Leadership Committee of The Resolution Project and as a director of Dream Hope Believe Foundation.

NAOMI HARDING

Principal Educational Consultant — Blackbaud

Ms. Naomi Harding is the Principal Educational Consultant for Blackbaud where she has worked for over 15 years in education and training. Ms. Harding specializes in helping non profit organizations achieve better fundraising results through the use of Blackbaud's software, such as Raiser's Edge and Altru. Ms. Harding graduated from Clemson University in 1991 before beginning a career in customer service. Blackbaud provides professional training and advice to non-profits globally — helping them increase their fundraising potential.

DON HART

President — United Church Funds

The chief executive of United Church Funds since 1991, Mr. Don Hart joined the Pension Boards UCC in 1989, serving first as Controller then as Treasurer and Assistant Treasurer of United Church Foundation, before being named Executive Vice President in 1991. A Certified Public Accountant and Accredited Investment Fiduciary, Mr. Hart lived in Caracas, Venezuela for 10 years serving as the Treasurer and Business Administrator for the Venezuela Mission of the Foreign Mission Board of the Southern Baptist Convention. He holds a BS in Business Administration from Auburn University and an MA in Missiology from Southwestern Baptist Theological Seminary. Mr. Hart serves on the Executive Council of the United Church of Christ and the Board of Trustees of Chicago Theological Seminary, and is a member of The Riverside Church in New York City.

JASON HENNING

Director of Investor Relations — Global Partnerships

Mr. Jason Henning joined Global Partnerships in 2004 and manages investor relations, fund capitalization and investor communications. For the past six years Mr. Henning has worked with a diverse set of impact investors, ranging from individuals and foundations to religious institutions and development banks. Prior to his work at Global Partnerships, Mr. Henning spent six years in politics, working in Washington, DC on issues of healthcare and energy, and on several congressional and presidential campaigns across the country. Mr. Henning earned a BA in political science from The Pennsylvania State University and an MPA from the Daniel J Evans School of Public Affairs at the University of Washington.

DON HILL

Consultant — Don Hill Consulting

Mr. Don Hill is an independent fundraising and planned giving consultant for faith communities and other non-profits. For 13 years he served as chief development officer for the national and global ministries of the United Church of Christ, overseeing the Church's national planned giving program. He was also responsible for the major and annual gifts programs, working with staff in all settings of the church to build fundraising capacity. A financial development and non-profit professional with over 30 years of experience, Mr. Hill has worked in a variety of settings including education, human rights, theological education and the arts. His past work includes leadership positions with Andover Newton Theological School, the Unitarian Universalist Service Committee and Outward Bound. Mr. Hill teaches fundraising and planned giving at New York University and is a member of the Board of Directors of Pacific School of Religion in Berkeley, California.

DAVE KLASSEN

Chief Investment Strategist — United Church Funds

A 30-year veteran of the investment and finance industry, Mr. Dave Klassen served on United Church Funds' Investment Committee before accepting his current position. Over the years, he has served in portfolio management positions at Morgan Stanley Dean Witter and JP Morgan Chase. Mr. Klassen earned a BA in Accounting from Franklin & Marshall College and a Master of Divinity from Union Theological Seminary. A Chartered Financial Analyst, he serves on the Investment Committee of Union Theological Seminary and the Board of Trustees of the Village of Irvington, New York.

KATIE McCLOSKEY

Director, Social Responsibility — United Church Funds

Ms. Katie McCloskey joined United Church Funds in 2007 and leads the social responsibility program. She also serves as the secretary of the Board of Directors of the Interfaith Center on Corporate Responsibility (ICCR), the organization of note for faith-based investing. Ms. McCloskey has extensive experience in the non-profit and humanitarian fields, and holds a BA in Women's Studies and Literature from the University of Virginia. She lives on Long Island with her husband and two children, and enjoys knitting and scuba diving.

THE REV. NELSON MURPHY

Director of Investor Development — United Church Funds

The Rev. Nelson Murphy joined United Church Funds in 2001 after working for the National Council of Churches, and previously for the Reformed Church in America. Upon graduating from college, he worked as a registered representative (stock broker) with the Hamilton Management Corp. The Rev. Murphy was ordained in 1973 by the Southeast Wisconsin Association after graduating from McCormick Theological Seminary in Chicago. He has served three UCC churches in New Mexico and Wisconsin, and now lives in Oakland, NJ. The Rev. Murphy is a proud grandfather of Henry, Graciela, Otis and Nicolas.

JESSICA PORTER

Senior Vice President & Director of Consulting — Summit Strategies

Ms. Jessica Porter is a Senior Vice President and lead consultant, and also serves as Director of Summit's Consulting group. Ms. Porter joined Summit in 2000, and prior to her transition to consultant, served as a valued member of the firm's Manager Research group, where she was responsible for conducting manager due diligence and all aspects of manager search/research for both domestic and international equity asset classes. Ms. Porter received her BS in Accounting from the University of Missouri—St Louis, and is a CFA charterholder and member of the CFA Society of St. Louis. Ms. Porter serves as a member of the Board of Directors of the St. Louis Area Foodbank. She enjoys following the Dallas Cowboys and St. Louis Cardinals, golfing, and spending time with her family.

CYNTHIA STEER

Head of Manager Research & Investment Solutions —BNY Mellon Investment

Ms. Cynthia Steer is the Head of Manager Research & Investment Solutions at BNY Mellon where she is responsible for performance oversight, due diligence and analysis of investment performance across BNY Mellon Investment Management. Ms. Steer is also the senior investment advisor to the executive management of BNY Mellon Investment Management, measuring and analyzing the firm's investment strategies and its overall solutions effort. Prior to her current role, Ms. Steer worked as the managing director of investment strategy and consulting for Russell Investments, and as the chief research strategist at Rogerscasey. Ms. Steer received a BA from Smith College and an MBA in Finance from The Wharton School at the University of Pennsylvania. Among her professional highlights, she was named the 2010 Distinguished Investment Professional of the Year by Women Investment Professionals. Additionally, Ms. Steer has written and lectured widely on strategic investment matters.

SHAWNA STOUT

Director of Development — Community Church of Vero Beach

Ms. Shawna Stout was born and raised in Ohio and graduated from Ohio University with a degree in psychology. After gaining extensive experience in the financial and investment industry she moved to Vero Beach, eventually becoming the Capital Campaign Coordinator for the Onward Together! capital campaign. Currently as the Director of Development, Ms. Stout coordinates the annual stewardship campaign, as well as the Planned Giving program. She has been a featured guest speaker at various seminars on Planned Giving and is an active member of the Planned Giving Council of Indian River County.

MATTHEW WAGNER

Investor Development Associate — United Church Funds

Prior to joining UCF, Mr. Matt Wagner worked for a private investment bank focused on merger & acquisition and capital sourcing activities for closely-held businesses, and as a financial advisor for one of the largest independent investment brokerage firms in the US. Mr. Wagner holds a BA from McKendree University and is a member of St. Paul UCC in Lebanon, IL. When he's not playing golf or coaching his daughters' athletic teams, Mr. Wagner volunteers for the Illinois South Conference UCC, the Boy Scouts of America's Lewis & Clark Council, the Mid-America Workforce Investment Board, and the Rotary Club of Red Bud, IL. He lives near St. Louis, MO with his two daughters.