



Western Regional Endowment Conference

Speaker Bios

The Rev. Patrick Duggan — Executive Director — Church Building and Loan Fund (CBLF)

Innovator, executive, consultant, and management professional in both the public and private sectors for over 25 years, Patrick Duggan is the Executive Director of the United Church of Christ (UCC) Church Building and Loan Fund (CBLF), and Pastor of the Congregational Church of South Hempstead (UCC). Since 1853, CBLF and its predecessor organizations have provided thousands of churches with planning, technical assistance and financing for the purchase of land and buildings and the construction of churches, schools, libraries, meeting houses, parsonages and other church buildings. An ordained minister with the United Church of Christ, Patrick has served as Senior Pastor of the Congregational Church of South Hempstead/United Church of Christ since 1995 where he has increased membership, assisted five seminarians to complete the ordination process, and led the congregation through a vision discernment process to create *CCSH 2043*, a vision plan for the church's next generation.

Lynne Hansen — Planned Giving Associate — United Church Funds

Lynne Hansen joined UCF in July of this year as the Planned Giving Associate after having administered the UCC Planned Giving program since 1997, through the Office of Philanthropy and Stewardship in Cleveland. Prior to this, Lynne worked for the Presbyterian Church (USA) Bicentennial Fund Campaign and the Presbytery of Giddings Lovejoy in St. Louis, and has served local churches in the areas of stewardship and mission interpretation for much of her adult life. Lynne earned a BA in psychology and English from Rutgers University. She currently serves on the board of her local League of Women Voters.

Donald Hart — President & Chief Investment Officer — United Church Funds

Donald Hart joined the Pension Boards UCC in 1989 and became president of UCF and treasurer of PBUCC in April 1991, serving as the Controller, Treasurer and Executive Director of UCF. A Certified Public Accountant, Don lived in Caracas, Venezuela for 10 years where he served 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. Don is a member of The Riverside Church in NYC where he sings in the choir. He has two children and one grandchild.

Don Hill — Consultant – Don Hill Consulting

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, Don 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.

The Rev. Elena Larsen — Senior Minister — First Congregational Church of Long Beach

The Rev. Elena Larsen is the newly appointed Senior Minister at First Congregational Church of Long Beach. After receiving an M.Div. from the Pacific School of Religion in Berkeley, Elena worked at the First Congregational Church in Palo Alto and as Campus Minister at Stanford University. Previously she was the Associate Conference Minister at United Church of Christ, Minnesota Conference. Elena has a strong justice orientation and is passionate about local and global community outreach. She is a renowned preacher, theologian, leader and visionary — known for her motivational abilities and humor.

The Rev. Cheri Lovell — Director, Marketing & Strategic Initiatives — United Church Funds

The Rev. Cheri Lovell worked as UCF's marketing consultant for six years before joining the team full time in 2012 to head up their marketing department. She has held various roles in the finance and not-for-profit sectors and graduated with a BA in Journalism from the University of North Carolina, an M.Div. from Emory University and a Certificate in Women's Studies. Cheri has extensive experience in banking and investments, earning securities sales, and principal's licenses, and is an ordained UCC Minister. When she isn't traveling between her two homes in NYC and North Carolina, she likes to knit and delve into the ever-expanding world of technology.

Kathryn McCloskey — Director, Social Responsibility — United Church Funds

Kathryn McCloskey joined the team in 2007 and oversees the responsible investing arm of UCF. With extensive experience in the not-for-profit and humanitarian fields, she holds a BA in Women's Studies and Literature from the University of Virginia, and is on the Interfaith Center on Corporate Responsibility (ICCR) Board of Directors as their Secretary and Vice Chair. Katie lives in Long Island and with her husband and two children and enjoys knitting and scuba diving.

The Rev. Nelson Murphy — Director, Investor Development — United Church Funds

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

Jessica Portis — Senior Vice President & Director of Consulting — Summit Strategies

Jessica Portis is a Senior Vice President and lead consultant, and also serves as Director of Summit's Consulting group. As a member of the investment consulting team, Jess is actively involved in the daily management and administration of client relationships. Her clients include public funds, corporations, and nonprofits. Jess 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. She received her BS in Accounting from the University of Missouri–St. Louis, is a CFA charterholder and member of the CFA Institute and the CFA Society of St. Louis. In addition, Jess is a member of NASP (National Association of Securities Professionals) and serves on the Board of Directors of the St. Louis Area Foodbank.

Andrew Russell — Director of Fixed Income Investments — Pension Boards-UCC

Andrew Russell is the Head of Fixed Income Investments at the Pension Boards-UCC where he directs fixed income investment management activities including portfolio management, research, trading, and investment risk management functions. Additionally he advises the CIO on asset allocation regarding externally managed fixed income strategies. Andy's primary responsibility is to lead the team that manages the respective in-house Core-Fixed strategies used by the Pension Boards Bond Fund and United Church Funds' Fixed Income Fund. Under his management UCF's Fixed Income Fund's Core-Fixed sub-portfolio has outperformed its index benchmark for every trailing period including 1, 2, 3, 5, 7, and 10 years. Prior to joining the Pension Boards-UCC in 2003, Andy spent over 10 years at Chase Asset Management where he held positions as analyst, trader, and portfolio manager, managing both Vista mutual funds as well as institutional bond portfolios. He graduated from the University of Vermont in 1990 with a BA in History and Political Science.

Matthew Wagner — Investor Development Associate — United Church Funds

Prior to joining UCF, Matthew 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. Matt holds a BA from McKendree University and is a member of St. Paul UCC in Lebanon, Illinois. When he's not playing golf or coaching his daughters' athletic teams, Matt 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, Illinois. He lives near St. Louis, Missouri with his two daughters.