

Northeast Regional Endowment Conference

Saturday, April 11, 2015 • 8:30am to 4:00pm • Salem Waterfront Hotel in Salem, MA



AGENDA

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|-----------------------|--|-----------------------------|
| 8:30 – 9:30a | Registration & coffee reception | |
| 9:30 – 10:30a | Invocation
Opening Plenary — The Church, Money & the Economy
<i>A panel discussion on financial and fundraising issues churches face, how churches use their endowments, desired return vs. risk tolerance, and more.</i>
<i>Panelists: Sylvia Ferrell-Jones, Don Hill, Dave Klassen Moderator: Don Hart</i> | Gary Schulte |
| 10:30 – 10:45a | Break | |
| 10:45 – 11:30a | Workshop Session A (<i>choose one</i>)
Planning your legacy
Reviewing & refining your endowment policy | Don Hill
Matt Wagner |
| 11:45-12:30p | Plenary — Getting Real about Spending Goals & Policies | Mark Parthemer |
| 12:30 – 1:15p | Greeting & blessing
Lunch | Jim Antal |
| 1:15 – 2:00p | Afternoon Plenary — Investing & Values
<i>Presentations from Dave Klassen (investments) and Katie McCloskey (SR), followed by discussion about responsible investing.</i>
<i>Panelists: Dave Klassen, Katie McCloskey Moderator: Don Hart</i> | |
| 2:00 – 2:15p | Break | |
| 2:15 – 3:00p | Workshop Session B (<i>choose one</i>)
Donor-friendly endowment marketing
The next steps in spending policies | Cheri Lovell
Matt Wagner |
| 3:00 – 3:15p | Break | |
| 3:15 – 3:45p | Reflection — Investing, Values & Being Church | The Rev. Dr. James Sherblom |
| 4:00p | Conference ends | |