

## STEPHEN L. ZIELINSKI

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### CURRICULUM VITAE

#### Introduction

**Steve has devoted his professional career to serving the specialized needs of religious institutes, church, and other faith-based organizations around the world. His mission is to help enable and empower leaders to better serve their organizations.**

Through his continuous work as a senior consultant and trusted advisor to religious institutes and their sponsored institutions, for more than 30 years, his experience is useful in **helping Leaders and Treasurers** to:

- Better understand their circumstances, challenges, and opportunities
- Design action plans to achieve desired outcomes
- Proactively implement, monitor, and report progress ongoing

The Congregation for Religious issued guidelines for financial management, in the circular letter signed Aug. 2, 2014 by Cardinal Joao Braz de Aviz, which exemplifies the philosophy and approach of Steve's **work toward improving the management of funds, highlighting a needed alignment between works and mission, and – in the longer term – informing a new approach of religious institutes to these issues.**

Steve is professional, diligent, and innovative in his work toward helping religious institutes achieve their goals, both short and long-term. This includes goals at the local, provincial, and worldwide, congregational level. He has worked in many countries and on most of the Continents.

Change is inevitable. As the average age in religious communities, in the northern and western hemispheres, increases and vocations continue to grow in the southern and eastern hemispheres, religious leaders are called to articulate a vision and establish a plan for future sustainability which supports the ministries and mission of the worldwide congregation in a financially secure and managerially sound manner. **This is no easy task and requires a high level of analysis, understanding, communication, leadership, and participation/engagement.** This process is often described as transformative and is especially challenging in organizations with members from countries with different cultures, languages, backgrounds, experiences, business/government, geographic, and socio/economic environments.

**Steve's extensive background and experience of working with Catholic religious institutes and their sponsored institutions has prepared him to excel in these matters** as a professional financial advisor, socially responsible investment fiduciary, and Catholic entrepreneur and leader.

**Current Professional Activities:**

- **ViaGem, LLC** is a Registered Investment Advisor based in St. Louis, MO who specializes in serving faith and mission-based organizations with a U.S. and global presence. The firm provides investment consulting and discretionary investment management to primarily, religious institutes and their sponsored institutions. [www.viagemconsulting.com](http://www.viagemconsulting.com)
- **ViaGem Consulting, LLC** is a Financial Advisory and Management Consulting firm focused on addressing the financial and management needs of religious orders in the U.S., Europe, Asia, Africa, and Latin America through ongoing advisory relationships, special project work, and financial services agreements to help leadership teams, treasurers, and directors achieve their goals and missions.
- **ViaGem Foundation – Mission Related Investment - Loan Program** has had a positive impact on a number of smaller nonprofit organizations, since 2009, who have requested assistance in finding financial resources to help them expand their ministries. Through an innovative “dual solutions approach”, linking high-impact investment opportunities with low-cost loans, ViaGem Foundation Program links the financial resources of larger institutes with those in need of funds. The program’s success is directly related to the trusted advisory relationships Steve has established over the years with religious leaders and has resulted in successful outcomes. [www.viagemfoundation.org](http://www.viagemfoundation.org)
- **Socially Conscious (SRI, ESG, and Ethical) Investing** – ViaGem is a premier provider of SRI Services to faith-based, institutional investors. With extensive experience and resources, ViaGem helps clients define their SRI guidelines and approach involving: negative screening, shareholder engagement and advocacy, manager/fund due diligence, company ratings, issue/industry research, proxy voting and compliance, and proactive SRI investing.

ViaGem’s *SRI Overlay Program* provides clients with a framework to help them: understand the (SRI and Corporate) issues, make informed decisions, and further advance mission effectiveness by leveraging their status as shareholders. ViaGem represents many clients at various SRI association meetings, including: Interfaith Coalition for Corporate Responsibility (ICCR), SRI in the Rockies, and several regional Coalitions for Responsible Investing (CRIs).

The work also entails review and critique of Corporate Social Responsibility (CSR), at the portfolio company level, including: Sustainability Reports and Environmental, Social, and Governance (ESG) policies/disclosures/rankings pertaining to activities in which companies are involved. Steve is committed to helping organizations/companies evaluate the effectiveness of their current programs and helping them to improve their capabilities to make a positive difference by doing well while doing good, and driving value by focusing on a “triple bottom-line”. This effort has been benefitted and continues to be inspired by Laudato Si’.



- **The Stewardship Culture Assessment** is a proprietary tool developed by ViaGem used with investment and finance committees (and companies) to:
  - Raise awareness of Stewardship
  - Educate fiduciaries about measuring, and balancing, triple bottom-line priorities
  - Identify gaps between current status and desired outcomes in areas relating to organizational and financial Stewardship
- **Financial Services** - Steve has worked his entire career with Treasurers, CFO’s, and Finance Directors on financial issues with religious institutes to improve the quality of financial performance and Finance Office operations.

These services include: Operational reviews, General reviews, Organizational assessments and restructuring, Policy–procedure manuals, Employee job descriptions/ evaluations/ hiring/terminations. Other services include: Reviews/assessments of insurance, legal compliance, real estate and facilities, social security and retirement funding/planning, and financial viability projections; Auditing, accounting and budgeting oversight, and Resource management and reporting at all levels of the organization.

- **Strategic Planning and Facilitation** – Steve has been involved as a team member, volunteer, advisor, and leader of numerous strategic planning processes. He is an avid reader of various thought leaders specializing in strategic and organizational management, viewpoints, and improvements. Steve has the ability to facilitate groups of various sizes, and is excellent at staying on task, on point, and on time. He is committed to documenting the most important aspects of all meetings which need to be summarized for the record/minutes, following-up action items, and preserving the institutional archive.

Steve has regularly attended for decades conferences, workshops, and assemblies such as: RCRI, LCWR, CMSM, NRRO, ICCR, and others.

- **Sisters of the Charity of the Incarnate Word (CCVI)** – Steve serves as Chairperson for the Congregational Investment Committee including the assets and interests located in the U.S., Mexico, Peru, and Zambia, under the leadership of S. Tere Maya, CCVI. His expertise and experience benefits the Congregation in many ways. Examples include his initiative to change the investment strategy in Mexico which has resulted in significantly higher returns than what was previously received, and introducing other alternative investment strategies which increased returns, while maintaining a relatively low level of risk.

His involvement in the investment industry, at the institutional and international levels, provides ready access to relevant, global resources and relationships as needed. His knowledge of risk management and investment management has helped to “raise the bar” on how the members carry out their role as Stewards of the Congregation’s resources.

Sr. Yolanda Tarango, CCVI, former Congregational Coordinator, stated: *“Steve is dependable and attentive to the needs of our organization. He brings significant energy to his role as an active member of our committees. His creative and thoughtful approach has a positive impact on our meetings and his commitment and professionalism have a positive impact on our results. Steve understands our congregation, the charism of our mission, culture of our community, and the leadership dynamics involved in our efforts to act to make God's love real in the world by promoting human dignity, especially among the most vulnerable.”*

- **Crosier Worldwide Investment Study** – Recently Steve completed a study for the master general and general council in Rome which involved an in-depth analysis of the investments, financial, and demographic profiles of the different areas of the Congregation and the establishment of a plan toward a fraternal economy to help share information, experiences, and resources between provinces and areas which have for many decades operated autonomously.

The project is just an example of Steve and his firm bringing professional skills, religious order experience, sophisticated analytical tools, and innovated solutions to address complex problems and provide valuable resources to benefit leaders of religious orders. Following are comments from Crosier leaders and an advisor:

Very Rev. Thomas A. Enneking, osc U.S. Prior Provincial - *We found Steve’s expertise in communication, professional experience and knowledge of financial management, commitment to meeting key deadlines in the study, outstanding quality of the prepared summary of the study, and thorough dialogue with the various people involved in our financial management, both Crosier and lay, to result in a very comprehensive study with helpful recommendations for us to consider.*

Mr. Frank Boomers – Dutch financial advisor and member of the General Finance Commission - *The assignment was highly sensitive, the topic very technical for the confreres involved and regional interest quite diverse and at times contradictory. In this very sensitive arena Mr. Zielinski managed through his bottom-up approach to create the trust and confidence necessary of most participants and acted with diligence and perseverance on realizing the goals of the assignment. He managed also to find appropriate ways to share the complicated information on a level manageable for those receiving it. I especially appreciated his efforts to assist the Order in proper ways of communications and the courage to speak out where this was hampering the cooperation.*

Very Rev. Laurentius Tarpin, OSC Master General of the Canons Regular of the Order of the Holy Cross - *Based on the successful partnership between the general leadership of the Order and the Consultant/ViaGem, I am optimist and convinced that results of the Investment study helped me a lot to move ahead to implement recommendations of the study for the sake of implementing the 2015 General Chapter Directives concerning fraternal economy. I am grateful and would like to express my sincere gratitude to Steve Zielinski and ViaGem who worked hard, consistently and professionally so that the Investment study accomplished timely.*

### **Background and Experience**

**Zielinski Companies**, a family business, was founded in 1957 to exclusively serve the financial and management needs of Catholic Institutes and their sponsored institutions. Over the years, the original CPA firm evolved to become a diversified professional services firm including: Fund develop, management consulting, investment management, health care services, facilities and real estate management, credit cards, and central banking services. [www.zielinskico.com](http://www.zielinskico.com)

Steve was an Executive Director with Zielinski Companies for more than 20 years and spent most of his time as a financial, accounting, and investment management consultant. After founding ViaGem, LLC in 2006, Steve has continued to work and collaborate with the family business as an independent contractor to provide financial and management services to many of the long-standing Zielinski clients.

**Commercial Banking Leadership Experience** - In 1987, Steve joined the legal board of a local community bank in St. Louis, which was later acquired by a regional bank. In 1993, Steve joined the legal board another local community bank and over the following 13 years served as: Chairman of two of the bank's financial centers, Audit Committee Chair, Investment Committee Member, Community Reinvestment Committee Member, and Loan Committee Member. In 2006, that bank was acquired by a regional bank.

### **Volunteer / Board /Committee Positions**

- 1992-1995 – President of the Missouri Athletic Club – Under Forty Organization
- 1993-2006 – Member of Trustcorp, Inc. Board (Associated with Missouri State Bank)
- 1997-1999 – President of the St. Louis University Alumni Association
- 2002-2004 – Member of the Finance Council for the Clerics of St. Viator in Chicago
- 2006–2008 – Member of the Entrepreneurs Organization Board – St. Louis Chapter
- 2009-2011 – Member of SchoolTube, LLC Board
- 1995 – Present – Active member of Interfaith Center for Corporate Responsibility (ICCR) and involved in multiple SRI/CSR issue committees
- 2010 – Present - Member, currently Chair, of the CCVI Investment Committee
- 2013 – Present – Guest Speaker on SRI/ESG topics annually at St. Louis University and University of the Incarnate Word.
- 2014 – 2016 Advisory Board Member for Hospital Information Security - Pilot Project

### **Professional Designations**

- Certified Investment Management Analyst (CIMA) through the Investment Management Consultants Association
- FINRA Registered Representative (Series 2, 7, 63, 79)
- Certified Valuation Analyst (CVA) through National Association of Valuation Analysts
- Real Estate Broker (Missouri)
- Prior recipient of the Accredited Investment Fiduciary Analyst (AIFA) designation through the Center for Fiduciary Studies

### **Education, Certifications and Awards**

Steve earned a Bachelor’s of Science in Management Sciences from St. Louis University. He also completed executive and investment certification programs from The Haas School of Business at the University of California, Berkeley; University of Pittsburgh; The Wharton School of the University of Pennsylvania; University of Chicago Booth School of Business, and University of Manchester, England.

Steve received service awards from St. Louis University as President of the Alumni Association and the Young Entrepreneurs Organization as a Board Member and Moderator of the Year for his work on various committees.

### **Personal Interests**

Steve and his wife Ursula have two post-college aged children Eric and Julie. Other interests include: International cultures, travel, music, art, sports, history, geo-politics, languages and the outdoors. Member of St. Catherine Laboure Parish in St. Louis.

## REFERENCE LIST OF RELIGIOUS INSTITUTE LEADERS

**Sr. Teré Maya, CCVI**, President of the Sisters of Charity of the Incarnate Word in San Antonio and President of Leadership Conference of Women's Religious (LCWR) [teresa.maya@amormeus.org](mailto:teresa.maya@amormeus.org)

**Mother Agnes Mary Donovan, SV**, President of the Sisters of Life in New York and President of the Council of Major Superiors of Women Religious (CMSWR) [mother@sistersoflife.org](mailto:mother@sistersoflife.org)

**Very Rev. John Pavlik, O.F.M Cap.** Former President of the Capuchin Franciscan Friars of Pittsburgh and President of the Conference of Major Superiors of Men (CMSM) [jpavlik@cmsm.org](mailto:jpavlik@cmsm.org)

**Sr. Pat Murray, ibvm - UISG** Secretary General, [segretaria.esecutiva@uisg.org](mailto:segretaria.esecutiva@uisg.org)

**Very Rev. Laurentius Tarpin, OSC** Master General Crosiers, Rome [master.general@crocigeri.it](mailto:master.general@crocigeri.it)

**Very Rev. Thomas Enneking, OSC** Prior Provincial U.S. Crosiers, Phoenix [tenneking@crosier.org](mailto:tenneking@crosier.org)

**Br. Stephen Glodek, SM**, Former Provincial of the Marianists U.S.A. and now a consultant at the National Religious Retirement Office (NRRO) in Philadelphia [sglodek@sm-usa.org](mailto:sglodek@sm-usa.org)

**Sr. Janice Klein, PBVM**, President of the Presentation Sisters in South Dakota  
[jklein@presentationsisters.org](mailto:jklein@presentationsisters.org)

**Sr. Rebecca Ann Gemma, OP** Prioress General, Dominican Sisters [sragemma@spdom.org](mailto:sragemma@spdom.org)

**Rev. David Fitzgerald, sP**, Servant General, Servants of the Paraclete [servantgeneral@aol.com](mailto:servantgeneral@aol.com)

**Sr. Francis Clare Radke, OSF**, Treasurer General of the Franciscan Sisters of Chicago  
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**Sr. Yolanda Tarango, CCVI**, outgoing Congregational Coordinator  
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**Sr. Kathleen Coughlin, CCVI**, Board Member CHRISTUS [kathleen.coughlin@amormeus.org](mailto:kathleen.coughlin@amormeus.org)

**Don Beeler**, CHRISTUS Health Sponsorship Committee [beeler.don@gmail.com](mailto:beeler.don@gmail.com)

## CATHOLIC CHURCH OFFICIALS AND REPRESENTATIVES

**Bishop Thomas J. Paprocki**, Diocese of Springfield, IL [tjpaprocki@dio.org](mailto:tjpaprocki@dio.org)

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**Bishop Mark S. Rivituso**, J.C.L. Auxiliary Bishop Archdiocese of St. Louis, MO

**Mr. John Maxwell, CFO** -Diocese of Springfield, IL [jmaxwell@dio.org](mailto:jmaxwell@dio.org)

**Carlo Dalla Vedova**, ESQ, Dalla Vedova Studio Legale, Rome, Italy [cdv@dallavedova.com](mailto:cdv@dallavedova.com)

## HEALTH CARE LEADERS AND PROFESSIONALS

**Jamie Wehrung**, Senior Director, Finance & Administration, Ascension Health Ventures  
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**Ernie Sadau**, CEO CHRISTUS Health System, [ernie.sadau@christushealth.org](mailto:ernie.sadau@christushealth.org)

**Jim Sanders**, Mercy Health - Portfolio Manager (Retired) [sanders0827@sbcglobal.net](mailto:sanders0827@sbcglobal.net)

**Ed Gerardo**, Director of Community and Social Investments, Bon Secours Health System, Inc.  
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**Yul Garces**, CEO CHRISTUS MUGUERZA Cali, Colombia [yul.garces@christushealth.org](mailto:yul.garces@christushealth.org)

**Guillermo Navarro Sada**, CCVI Finance Committee – CHRISTUS Consultant Monterey, Mexico  
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## OTHER PROFESSIONALS

**Francis Slay**, Former Mayor of the City of St. Louis, 314-622-3201

**Ann Wagner**, U.S. Congresswomen 2<sup>nd</sup> District of Missouri 202-225-1621

**Aloys H. Litteken**, Anheuser Busch (Retired Executive) former CCVI San Antonio Finance Committee Chair [ahl-cdl@swbell.net](mailto:ahl-cdl@swbell.net)

**Steve Smith**, CEO The Lawrence Group – Health care architects  
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**Tom Chulick**, Chairman and Chief Executive Officer of UMB Bank St Louis  
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