



Journey to a Secure Future

ViaGem provides



Investment management consulting to religious institutes, church and other mission-based organizations, including:

- Financial planning, fiduciary consulting, steward education
- Organizing, assessing and designing investment strategies
- Implementing, coordinating and monitoring the investment process

ViaGem's mission is to enable leaders to serve their organizations better.

Why we do what we do?

We are dedicated to the global standards of excellence in our profession and enthusiastically committed to helping and enabling our clients to succeed. We are privileged to work side by side with them, as trusted advisors, to develop and carry out important plans and decisions affecting the future of their organizations and the people they serve.



Ask yourself...

— Is our strategy focused on meeting our organization's specific goals?

Is our process meaningful and useful to all parties involved?

Are we positioned to take advantage of opportunities and avoid common investment pitfalls? (such as: hidden risks and hidden fees)

Are we taking on the appropriate level of risk for our situation?

Are we doing the best job possible as fiduciary stewards and fulfilling applicable standards?

— Imagine being able to consistently affirm each of these important aspects.

However, if you answered "Don't know" or "No" to any of these questions, it's ok, because, this is the type of work we do with our clients, and we would welcome the opportunity to talk with you to see if we can help.

Our experience and approach enables us to quickly identify and understand your situation, needs and priorities. We formalize your investment plan and process to focus on your goals and issues, including specific "best practices" for successful implementation.

ViaGem takes the lead to keep the process on track with consistent communication, evaluation, and periodic educational workshops and planning sessions. We require open dialogue and collaboration with all parties involved in order to maintain clear expectations (roles and responsibilities), mutual trust and a discerning decision-making environment.

Quarterly Evaluation Reports are prepared using:

- State-of-the-art management and performance evaluation tools
- Up-to-date market data and socially responsible investment (SRI) practices
- Comprehensive methods for manager and fund due diligence

As an independent co-fiduciary, ViaGem does not accept compensation or commissions from money managers on assets under advisement.

Experience ViaGem

ViaGem, LLC is a Registered Investment Advisor. (The word "ViaGem" is of Portuguese origin meaning "Good Journey.") Since the early 1980's members of the ViaGem team have worked full-time with numerous religious congregations, sponsored institutions and church entities on various types of investment accounts and a broad scope of related issues.

Stephen L. Zielinski, CIMA, AIFA, AVA



Steve is President and a Senior Consultant. Since graduating with a Management Sciences degree from St. Louis University, he has devoted his professional career to serving the specialized needs of religious institutes, church and other faith-based organizations around the world.

Related industry certifications, licenses, and affiliations:

- Certified Investment Management Analyst (CIMA)—The Haas School of Business at the University of California, Berkeley
- Accredited Investment Fiduciary Analyst (AIFA)—Center for Fiduciary Studies
- Designated Investment Advisory Officer—NASD Series 7, 63, and 2; NSAA Series 65
- Investment Management Consultants Association (IMCA) Endowments and Foundations Certificate—The Wharton School of the University of Pennsylvania
- Accredited Valuation Analyst (AVA)—National Association of Certified Valuation Analysts (NACVA)
- Interfaith Center on Corporate Responsibility (ICCR)

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