



Journey to a Secure Future



In Service for Religious Institutes, Church and Other Mission/Faith- Based Organizations

- Investment Consulting
 - Fulfill Opportunities
 - Avoid Pitfalls
 - Reach Your Goals
- SRI and Fiduciary Counseling
 - Best Practices
 - Measured Effectiveness
 - Sustainability
- ViaGem Foundation Program
 - For organizations with financial needs in developing areas

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

Experience ViaGem

ViaGem, LLC is a Registered Investment Advisor. (The word "ViaGem" is of Portuguese origin meaning "Journey.") Since the early 1980s, 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)
- Twenty years of banking experience as outside legal director and loan, investment and audit committee chairperson
- Interfaith Center on Corporate Responsibility (ICCR)
- Delegate in the Poverty and Capital Conference at the University of Manchester, United Kingdom
- Atendemos en Español

ViaGem LLC

10805 Sunset Office Drive, Suite 300

St. Louis, MO 63127

(p) **314.307.1090**

(f) 314.238.1250

(e) szielinski@viagemconsulting.com

(w) www.viagemconsulting.org



Please Check Items that Describe Your Situation

For more information, please fill out this card, detach and fax or mail to address on back.

- We are interested in **measuring our SRI and Fiduciary effectiveness** in comparison to the industry's "Best Practices" in order to do the best job possible as stewards.

- Our overall investment **process and results could be improved** to fulfill more opportunities and avoid common pitfalls.

- We are financially secure and **considering new ways to make alternative/ community investments** or contributions to help others in need.

- We are (or affiliated with) a faith-based organization **in financial need, in a developing area** that does not have access to professional assistance or resources, but would benefit from them.

- Other *(please describe)* _____

Organization

Contact Name

Title

Address

Address

City

State/Province/Country

ZIP Code

Email

Phone

Ext.

fax or mail to:

ViaGem LLC
10805 Sunset Office Drive, Suite 300
St. Louis, MO 63127
(p) **314.307.1090**
(f) 314.238.1250
(w) www.viagemconsulting.org