2010 Annual Report

Christian Church Foundation
Celebrating 50 Years of Helping Disciples Make a Difference
Important Note

This is an abbreviated version of the Foundation’s printed Annual Report. To receive the full report, call us at (800) 668-8016.
Our Mission

Our mission is to support and expand the ability of all Disciples ministries to worship, witness and serve. We do this by identifying and resourcing donors who desire to make a difference through planned gifts, and by assisting Disciples ministries to be good stewards of their gifts through sound policies and prudent investment services.

Our Core Values

Integrity
Honesty, transparency, full disclosure and the ability to fulfill our commitments.

Commitment to Excellence
Continually working to improve our services and processes and to be responsive to the needs of donors and of our church.

Stewardship
Serving as trustee for donor and church dollars with the same level of commitment and care that we would have for our own resources. Understanding our purpose for being as a ministry to serve and to benefit all ministries of the Christian Church (Disciples of Christ).

Fiduciary Responsibility
Prudent and diligent oversight of funds under management. Commitment to treat each donor dollar as a sacred gift, requiring the highest level of care.

Partnership
Working to support all of the ministries of the church. Serving as an honest broker to connect ministries and donors for the benefit of the Gospel.
From the President

My colleagues and I are happy to report that your Christian Church Foundation is in excellent condition. 2010 was another year of solid growth.

Total gifts and investment deposits reached $28.2 million in 2010, $10.4 million more than was recorded in 2009. All four of our investment funds enjoyed double-digit returns. We made distributions totaling $7.4 million last year and our total assets grew from $382.6 million in 2009 to $438.6 million — a new record for the Foundation.

This year, we are celebrating the Foundation’s 50th Anniversary! This milestone brings much for the church to celebrate: a legacy from founders like the ones pictured on the cover who cared deeply about the future witness of Disciples, a growing number of generous donors who are making a difference through their faithful stewardship, and a family of Disciples ministry partners dedicated to being a movement for whole-ness in a fragmented world. For all this we are thankful!

Fifty years is not very long in the course of human history, but it is long enough to make a tremendous difference in shaping history. In the 1950s, Dr. Spencer Austin headed Unified Promotion — one of the forerunners of Disciples Mission Fund. Dr. Austin recognized that Disciples ministries were missing out on opportunities for legacy giving, so he took the first step and proposed the creation of a church-wide foundation.

Making a difference always requires making that first move, stepping out on faith. Dr. Austin died last April, four months following his 100th birthday. At his memorial service we were all reminded of how one life lived well changes history. The whole church is heir to Spencer Austin’s vision and initiative.

Much has changed since the Foundation began in 1961. The Rolodex and rotary phone, used by founding president Jim Reed in the 1960s, have been replaced with internet technology and phones that go everywhere. The Foundation’s staff has embraced and harnessed technological changes to further the effectiveness of this ministry. But change is not what defines us, or our ministry.

Jim Reed’s legacy is alive and well in our core values. It is still relationships which matter most. Listening to Disciples donors and working with them to develop creative and effective ways to bless the ministries they love will always be our mission.

We will be a faithful partner with Disciples congregations, regions, general ministries, seminaries, colleges and other church institutions to provide cost-effective, value-added investment services that will provide maximum resources for ministry.

The church can depend on the Foundation to provide Disciples ministries with the best practices available to help those ministries receive and manage end-of-life gifts in a way that encourages future gifts and expands ministry. And we will always be there to help congregations establish their own legacy plans so that their witness can extend into the future and their ministry can continue, even when their physical doors have to close.

Our mission is clear and our values are unshakable. We are here for you today and we will be here for you tomorrow, helping you do your part in shaping history.

Sincerely,

Gary W. Kidwell
President
On the Cover

Throughout the history of the Christian Church Foundation, many individuals have played vital roles in shaping and cultivating this financial ministry. The names of many of these saints can be found on the pages inside. The cover of this annual report includes:

1. Theodore Beasley, endowing founder, whose seed gifts helped start the Foundation and endowed the office of the president.
2. A. Dale Fiers, the first general minister and president of the Christian Church, who is pictured with a photo of his sister, Othel, and her husband, DeWitt Brown. The Browns bequeathed more than $8 million to the Foundation, which was at that time the largest estate gift made to a mainline Protestant denomination.
3. Jim Reed, the Foundation’s first president, along with Herb Barnard, the Foundation’s first vice president, and Opal Rohrer, the first corporate secretary.
4. John Compton, the noted Disciples leader, who in retirement assisted the Foundation in working with African-Americans on planned gifts and who helped inspire the idea of the Black Disciples Endowment Fund.
5. Jim Reed, retired president, Jim Johnson and Spencer Austin, seated. Johnson succeeded Reed in 1997; Spencer Austin was in charge of Unified Promotion in the late 1950s and early 1960s and helped convince leaders that the Disciples needed a foundation. Dr. Reed died in 2007 and Dr. Austin in 2010.
6. Hannah Younghusband was an early member of the Foundation’s Board of Directors and used the Foundation as a conduit for her philanthropy.
7. Lucas Torres was the first national pastor of the Central Pastoral Office for Hispanic Ministries and helped create the framework for planned gifts and permanent funds within Hispanic congregations.
8. Joe A. and Nancy Vaughn Stalcup have long been active proponents of the Foundation. Mr. Stalcup served on the Board of Directors and in key advisory roles to Dr. Reed, Dr. Johnson and current president Gary W. Kidwell.
At the Christian Church Foundation, ministry, stewardship and partnership are interwoven. The Joint Investment Trust of the Christian Church Foundation (JIT) combines all of these values by allowing the ministries of the Christian Church (Disciples of Christ) to share in the benefits of the Foundation’s long-term investment experience. Designed to meet the dual goals of providing maximum resources for ministry while also growing endowment funds to keep pace with inflation, the JIT provides Disciples ministries access to the investment diversification, oversight and economies of scale otherwise available only to the very largest institutional investors.

Open to any Disciples-related ministry responsible for the stewardship of long-term funds, the JIT currently serves more than 660 Disciples congregations, regions, general ministries and other recognized organizations. Some of those ministries are just beginning to build their endowment funds, while others have millions of dollars invested. At the end of 2010, the Joint Investment Trust had a total invested balance of over $384 million. Investors include more than 570 congregations, 53 regions and areas, and 35 general ministries and recognized organizations and ministries.

Investors in the JIT realized a second straight year of significant gains, capturing the rebound from the economic recession of 2008 and early 2009. Investors who had the discipline to stay the course have been rewarded. The table on Page 5 shows the JIT’s four pooled funds. Each fund offers a distinct investment option for the long-term church investor. The table also provides historical returns as of December 31, 2010.

Both the Common Balanced and the Beasley Growth Funds have had positive returns for 11 of the past 15 years. The Brown Income Fund has had positive returns for all but one of the past 15 years and the Campbell Fund, introduced in 2008, had positive returns in 2009 and 2010.

Solid, long-term investment returns are the visible results of the Joint Investment Trust, which is an all-inclusive solution for the church’s long-term endowment assets. Much of what happens behind-the-scenes helps foster these excellent returns and helps ministries to fulfill their responsibilities as stewards, including:

- Asset allocation: The Foundation’s Investment Committee and independent investment consultant look at long-range trends and models for investment allocation strategies, and then select best-of-class fund managers to implement the strategy. This approach provides investors with unique products tailored to fit the investor’s tolerance for risk.
- Internal controls: The Foundation maintains a separation between custody and investment of funds; thus, investment managers do not have physical possession of the investment assets. Independent custody is one important step in preventing fraud.
- Due diligence reviews: Ongoing oversight of investment managers, including frequent on-site visits and no less than quarterly analytical reviews, is part of the services provided by our investment consultant, Prime, Buchholz & Associates. Foundation staff and the Board’s Investment Committee also independently review both our managers and the services of our consultant.

In recent years, the Uniform Prudent Management of Institutional Funds Act (UPMIFA) became the law in most states. UPMIFA has caused many church trustees to consider whether interest-bearing accounts are the appropriate investments for their endowment funds. The basic principles on which the Foundation built our investment program are now required considerations: to ensure long-term growth while also maximizing ministry distributions. A requirement of UPMIFA for most endowments, the determination of a disciplined spending rate, is facilitated for the Foundation’s ministry partners by the Foundation’s independent assessment of this rate.

The Foundation continues to look for ways to serve ministries that steward endowment gifts. In 2010, we expanded a service that assists our ministry partners in understanding the record keeping and spending responsibilities for their endowment gifts. This free service helps ministry partners understand the importance of documenting the language governing endowment gifts, permanently retains copies of important donor documents at the Foundation, and establishes distinct investment accounts for restricted endowment gifts that are owned by our ministry partners. We believe that, together, we can encourage more gifts for ministry by ensuring that the best practices of stewardship are applied to existing gifts.
<table>
<thead>
<tr>
<th>Fund</th>
<th>Description</th>
<th>1 Year</th>
<th>3 Year</th>
<th>5 Year</th>
<th>10 Year</th>
<th>Since Inception</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beasley Growth Fund</td>
<td>is for institutional investors able to tolerate higher levels of volatility. The asset mix approximates 52% domestic equity, 20% international equity, 11% domestic fixed income, 11% global fixed income and 6% alternative investments.</td>
<td>12.938%</td>
<td>-1.343%</td>
<td>2.408%</td>
<td>2.931%</td>
<td>9.3% (Dec. 1985)</td>
</tr>
<tr>
<td>Common Balanced Fund</td>
<td>seeks to produce strong total returns with only moderate volatility. The asset mix approximates 43% domestic equity, 10% international equity, 17% domestic fixed income, 15% global fixed income and 15% real assets.</td>
<td>13.559%</td>
<td>1.178%</td>
<td>3.559%</td>
<td>4.032%</td>
<td>8.0% (Dec. 1985)</td>
</tr>
<tr>
<td>Campbell Multi-Strategy Fund</td>
<td>seeks to produce higher returns with lower volatility. The asset mix approximates 33% domestic equity, 20% international equity, 30% alternative investments and 17% real assets.</td>
<td>12.850%</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
<td>-0.7% (Feb. 2008)</td>
</tr>
<tr>
<td>Brown Income Fund</td>
<td>seeks to maintain stability while at the same time striving for modest appreciation. The asset mix approximates 25% domestic equity, 30% domestic fixed income, 30% global fixed income and 15% real assets.</td>
<td>12.277%</td>
<td>4.295%</td>
<td>4.738%</td>
<td>5.235%</td>
<td>6.5% (Dec. 1989)</td>
</tr>
</tbody>
</table>

Past performance is not indicative of future results. All returns are net of costs.

### Asset Classes

- Large Cap Equities
- Mid Cap Value Equities
- Small Cap Growth Equities
- International Equities
- Intermediate Duration Bonds
- Church Extension Investment Notes
- Global Bonds
- Alternative Strategies
- Real Assets/Inflation Offsetting
Great Lakes Zone

The 15 states that make up the Foundation’s Great Lakes Zone have introduced me to a wide variety of Disciples who make up the Christian Church (Disciples of Christ). I count it as a blessing to work with 640 individuals and another 180 pastors who serve congregations in this zone.

As we work with individuals and congregations, one of the Foundation’s core responsibilities is to simply listen. We listen to donors talk about the ministries of the church they care for deeply, and their desire to make a difference through their legacy gifts. We listen to pastors and church leaders as they handle the challenges, hopes and dreams of congregations called to serve and witness.

Last year, Central Christian Church in Newark, OH, was blessed with an unexpected gift. Encouraged by their pastor, Rev. Rick Rintamaa, the church trustees invited me to come and listen to their investment needs. After years of investing the congregation’s long-term funds in bank CDs, the trustees were frustrated with low rates. Willing to take on a little more risk, the trustees opened accounts in the Foundation’s Beasley Growth and Common Balanced funds. They have received distributions more than three times what their experience with the bank had brought them.

Michael Large, trustee chairman, reports that not only was the return a pleasant surprise, but “working with the Foundation support people has left a very positive impression.” Central is among the 148 ministries in the Great Lakes Zone that has investments on account at the Foundation.

The Foundation’s investment program has a demonstrated record of providing returns, over the long term, which provide dollars for ministry, while growing to keep ahead of inflation. It is the same investment strategy the Foundation uses with the $123 million in permanent funds it manages on behalf of donors. The Foundation seeks to partner with our congregational, regional and general ministry and institutional investors to build resources for mission into the future.

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Southeast Zone

Throughout my visits to congregations and individuals in the Foundation’s Southeast Zone, I continue to be amazed and blessed by leaders who embrace the stewardship of accumulated resources.

One of the joys which I experienced in 2010 was working with the Sandy Springs Christian Church in Atlanta, GA. Key leaders in the congregation decided to promote legacy giving for the church by example and through leadership and encouragement. At the same time that they were finishing their Legacy Fund Policy, they also began systematically asking members to consider putting their own gift plans in place and to become members of The Fellowship of Legacy Builders (made up of those who have included the church in their end-of-life plans).

One of the first events was a social gathering for longtime SSCC members in a leader’s home for refreshments, sharing memories of the church and inviting these individuals to become members of the Fellowship of Legacy Builders to lead the way in this effort. I was then invited to preach on legacy gift giving and to lead a planned giving seminar for church members. I later returned for additional consultations with interested church members.

What a special process this has been to teach stewardship and invite Disciples to remember the church they love in their end-of-life plans. It is both fun and rewarding for me to work with churches like Sandy Springs and to see how church leaders so often move from a fear of asking for such gifts to a sense of amazement at the gratitude and joy which church members express in legacy giving. Years from now, as the ministries of churches like this are benefitting from new streams of permanent fund income, I can only imagine how they will look back on this process as a defining moment in their congregation’s history.

Is this a ministry which might be important in your congregation?

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The Great Lakes Zone includes Illinois, Wisconsin, Michigan, Indiana, Ohio, Pennsylvania, West Virginia and the states that are part of the Northeastern Region.

The Southeast Zone includes Alabama, North and South Carolina, Tennessee, Kentucky, Florida, Georgia, Virginia and the area served by the Capital Area region.
North Central Zone

One of the tremendous blessings of working with the Christian Church Foundation is to sit in the company of the greatest saints of the church – the individuals and couples who have a great vision of what the world should be and have a deep, abiding love for the church that has nurtured them.

In 2010, we lost one of those saints, Sally Smith of Iowa. Sally was one of the first individuals I had the pleasure of working with when I joined the Foundation in 1997. We talked about her vision of creating a legacy gift that would forever benefit the causes and ministries that were important to her: overseas ministries, higher education, disaster relief and First Christian Church of Coralville, IA. Three years after our first contact, her plan was put in place.

Although she is no longer with us, her legacy remains. With a permanent fund established from her estate, each and every year these church causes will receive an income distribution to undergird their important ministries. Each year they will be blessed by the life and legacy of Sally Smith. Each year students will be assisted, human suffering will be alleviated, and the Gospel will be shared. Each year First Christian Church will know that Sally’s love for this congregation continues to support its ministries, just as it did during Sally’s life.

Sally’s niece and nephew were like her own children and they cared deeply about their Aunt Sally. Sally’s estate plan included creating charitable trusts that will pay her niece and nephew for the rest of their lives. Each year the gifts they receive will remind them of Aunt Sally’s love.

Sally’s story is like that of many of the thousand people I’ve come to work with in the Foundation’s North Central Zone. These individuals’ deep love for the ministries of the church continues through their legacy gifts.

I give thanks to God for Sally and for the many other saints of our church. People don’t have to have tremendous wealth to make a difference – just a desire and willingness to put a plan in place.

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The North Central Zone includes Iowa, Missouri, Kansas, Nebraska, North and South Dakota and Minnesota.

South Central Zone

Much of the Christian Church Foundation’s ministry with individuals is planting seeds — providing vital information so that faithful stewards can make the right decisions for themselves as they seek to create legacy gifts to benefit the church causes they love. It is very exciting when we see those plans come to fruition, especially when the Foundation is able to be flexible to meet the donors’ needs.

During the 2007 General Assembly in Fort Worth, I had a discussion with an assembly delegate from a north Texas congregation. He attended the Foundation’s resource group and visited us at our booth in the exhibit area. He was most interested in the benefits of a deferred gift.

Last year, he and his wife received a windfall in profits from a natural gas lease. The windfall was significant, and they knew they needed to do something to reduce their taxes and they wanted to help their congregation. They confided in their pastor, who brought me into the discussion.

Within days, I was in the couple’s home, listening to their story and hearing about their passion for the church’s witness. We discussed a variety of options that would meet their goals of making a gift, saving on taxes and providing them a future stream of payments. By the end of the year, they had used their gas royalties to make a deferred charitable gift annuity, with the congregation as the remainder charitable beneficiary. They also funded a donor-advised account — called a Steward’s Bank — that gave them an immediate income tax deduction while giving them the flexibility to “advise” future gifts to their congregation and other charities.

There are many others in the South Central Zone whose care for the church has led them to create a legacy gift. I’m in relationship with 1,300 people throughout the zone, along with 130 pastors — who play an important partnership role.

My Foundation colleagues and I will be at the General Assembly in July 2011 in Nashville. Stop by our booth or attend one of our resource groups — and let’s talk about planting seeds.

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The South Central Zone includes Mississippi, Arkansas, Texas, Louisiana and Oklahoma.
2010 was a year of transition for me as I became vice president for the Foundation’s Southwest Zone. My zone includes Arizona, New Mexico and the area served by the Christian Church in the Pacific Southwest. I’m looking forward to meeting more than 200 individuals who already have an established relationship with the Foundation, and with the 35 congregational pastors who have worked with us in the past.

One of the blessings from 2010 was seeing first-hand how a congregation can have a new life even though members no longer worship as a single church. When Bellaire Christian Church in Houston closed its doors, many of the members there became part of the Bethany Christian Church congregation. Vital Bellaire ministries continue to this day as the congregation converted assets into a permanent fund at the Foundation.

Today, those funds provide two fully funded scholarships at Brite Divinity School and a Legacy Fund makes an annual distribution to Bethany. Bethany also has embraced many of the social ministries Bellaire had supported. As former Bellaire minister — and current Bethany senior associate — Herschel Moore says: “After we moved to Bethany, the contributions to all of those ministries have at least doubled, and not only in financial support, but hands-on support. We actually have more people from Bethany going to a neighborhood center and doing hands-on things than we ever had at Bellaire. The life of the church has continued.”

While there is always some grief when a ministry closes its doors, it is a powerful reminder of the resurrection when the congregation’s witness is able to live on in new and exciting ways. As I listened to the hopes and passions of the Bellaire leadership, I was inspired by their vision to continue ministry without spending down all of their assets.

Legacy congregations are just like individuals in the Foundation’s eyes. We listen to their stories and the ministries and Christian witnesses they are passionate about, and work with them to put a plan in place so that their goals can be achieved.

Marilyn Fiddmont
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Do nothing out of selfish ambition or vain conceit. Rather, in humility value others above yourselves, not looking to your own interests but each of you to the interests of the others.

Philippians 2:3-4 (New International Version)

The concepts of planned giving and permanent and endowment funds for congregations are new to many of my Hispanic brothers and sisters. As I meet with individuals and pastors in the United States and Puerto Rico, I often share with them the ways they can bless the church simply by creating an estate plan that benefits their congregation or other Christian ministries or institutions.

It brings me great joy when I see people begin to get a glimpse of how this can work, especially when I hear stories of those who have been blessed because of the gifts left by others.

During my 2010 trips, I have met Mexican Disciples pastors and leaders who are planting new congregations. They shared how they had first learned about the Gospel from American Disciples missionaries to Mexico, and then how they had attended seminary there.

Together we rejoiced as we learned that permanent endowment funds held at the Foundation provide much needed support to encourage and support our partnerships in Latin America and the Caribbean. These pastors and leaders were very appreciative of the partnership Disciples in the United States have with Mexico that help prepare pastors for ministry and the planting of new Hispanic Disciples congregations in America. They were thankful that the Foundation and other Disciples were not looking to their own interests, but to the interests of others.

God is doing wonderful things through the ministry of the Christian Church Foundation!

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Enrique Ocasio works with Hispanics and Spanish-speaking individuals, clergy and congregations throughout the United States and Puerto Rico.
As many of you may know, I conclude my ministry with the Christian Church Foundation at the end of June 2011. My wife Bev and I are looking forward to enjoying retirement time for traveling, bicycling and spending quality time with family.

I have been blessed to have been able to spend these last 12 years on the Foundation staff. I’ve met some tremendous people along this journey, and have been blessed to hear their stories and observe their faithful stewardship.

As I worked with creating the legacy of the Hollywood-Beverly Christian Church, I met Jeanne Karpenko. An intelligent woman with a mind for details — from her years of being on the staff of the Los Angeles Times — Jeanne would often ask pointed questions about the Foundation, the services provided and our ministry. Charitable gift annuities had piqued her interest, and she wanted to learn how she could complete such a gift through the Foundation to benefit the work of her church as well as other charities.

The flexibility of the Foundation to permit distribution from the remainder interest in the gift annuity to charities outside of the Christian Church (Disciples of Christ) was important to Jeanne. The Christian Church (Disciples of Christ) is her church and she was pleased that her church provided the avenue through which she could make gifts to ministries within her church and charities she supported beyond the life and work of the Disciples.

Being responsive to the needs of our donors is a critical element in the mission and ministry of the Foundation. I’ve been honored to be part of a staff that encourages “outside the box” thinking and cooperation, all the way from development officers to administrative and treasury staff.

Thank you for sharing this journey with me. I will be leaving the Foundation with a great appreciation for the friendships we’ve shared and the ministries, now and in the future, that will be blessed by your gifts.

Onward!

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The Mountain West Zone includes Washington, Idaho, Oregon, Montana, Canada and areas served by the Northern California-Nevada and Central Rocky Mountain regions.

New Mountain West Zone vice president

The Foundation in June 2011 welcomes the Rev. Jerry Lang as the new vice president of the Mountain West Zone. He comes to the Foundation after serving 10 years at Central Christian Church in Denver, CO.

An ordained minister for 30 years, he has served as a congregational pastor and as a missionary to Nigeria. He has a bachelor’s degree in business administration and graduate degrees from Lexington Theological Seminary and the University of Alabama.
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