



Catholic Investment Services Hosts Second Catholic Investor Symposium

Catholic Investment Services held its second Catholic Investor Symposium in Chicago on October 17 and 18, 2024. Over 120 Catholic asset owners, fiduciaries, investment consultants and other interested parties gathered to discuss investment excellence aligned with Catholic social teachings.

We packed a lot in over the span of 24 hours. Our guests were warmly welcomed by **Sister Suzanne Brennan, CSC**, who blessed our meal and gathering with an inspirational opening prayer and an impassioned call to action.



Our two founders, CIS Board Chair **Scott Malpass** and Founding Chair **Jack Brennan**, and CIS board members **Sister Irene O’Neill**, **Paulita Pike**, **Paul Schott Stevens** and **David Taiclet** joined the CIS team and senior executives from **Hamilton Lane**, our private market solutions partner, and **Wellington**

Management Company, our partner for public market strategies.
Program

We were fortunate to have an accomplished, diverse, and thoughtful group of panelists discuss topics including Catholic values investing, board governance, impact investing, private markets, alternatives and asset allocation strategies.

Highlights of the program included:

- A keynote conversation about *Mensuram Bonam* featuring **Jean-Baptiste de Franssu**, President of the **Vatican Bank**, and **Fr. Elmer Bauer III**, Provincial Treasurer, Eastern Province of the Congregation of the Mission.
- A “fireside chat” between **Jack Brennan** and **Andrew McMahon**, CEO of Guardian Life Insurance Company and Chair of the Investment Committee, Fairfield University.
- A stimulating Day 2 Keynote by **Juhi Dhawan**, Partner and Macro Strategist, Wellington Management, who discussed the global economic outlook.
- A lively panel discussion about “*What Keeps Us Up at Night.*”



The audience was engaged and asked thoughtful questions of each panel. *The Symposium Agenda and video and podcast versions of many of the keynote and panel discussions will be available at our CIS Institute Symposium website, www.catholicinvest.org/cis-symposium/.*

Feedback from Attendees

- “I enjoyed the mix between keynote speakers and the panel discussions. The topics were great.”
- “Great networking and ability to make connections.”
- “There was a lot to like....Quality of the attendees and presenters was second to none.”
- “The event was terrific...it was not sales-ey, more educational, and a nice balance.”
- “Great venue and location, Everything was top-notch.”
- This year our big takeaway was the importance of formal and professional structures and processes...”



A BIG THANK YOU TO OUR PANELISTS, PARTICIPANTS AND SPONSORS!

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