



## Catholic Investment Services Hosts Inaugural Catholic Investor Symposium

Catholic Investment Services held its inaugural Catholic Investor Symposium in Chicago on March 23 and 24, 2023. Over 140 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 **Monsignor Kenneth Velo**, Co-Chair of Chicago's Big Shoulders Fund and Senior Executive at De Paul University, who blessed our meal and gathering with an inspirational opening prayer and offered mass before our morning session the next day.



Our two founders, CIS Board Chair **Scott Malpass** and Founding Chair **Jack Brennan**, and CIS Trustee **Paulita Pike**, joined the CIS team and senior executives from **Hamilton Lane**, our private market solutions partner, and **Wellington Management Company**, our new 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 public market portfolio management strategies. Highlights of the program included:

- A "fireside chat" between **Scott Malpass** and **Jean-Baptiste de Franssu**, President of the **Vatican Bank**.
- A keynote presentation by **Drew Schardt**, Head of Global Investment Strategy at Hamilton Lane, who emphasized the diversification opportunities and return potential offered by private markets and also debunked some common misconceptions.



- **Jack Brennan** moderated a conversation that established a strong foundation for the more focused panels that followed. Some key takeaways included:
- It is possible to execute sophisticated portfolio strategies without compromising Catholic values.
- Remaining focused on the long term is the key to ensuring success for perpetually endowed institutional portfolios supporting compelling Catholic missions. Continuing to diversify globally makes good strategic sense.



- Investment committees and managements should establish disciplined investment policy statements and strategic asset allocations and have a process for reviewing them—but not necessarily changing them—on an annual basis.



- Private market investments offer another opportunity for productive diversification and should play an increasingly important role in portfolio construction, particularly where the institution can manage the illiquidity that comes with such investments.

The audience was engaged and asked thoughtful questions of each panel. The Symposium Agenda and video and podcast versions of the panel discussions will be available on our CIS Institute Symposium website, [www.catholicinvest.org/cis-symposium/](http://www.catholicinvest.org/cis-symposium/).

### Feedback from Attendees

- “While I am fortunate to attend many investment conferences each year, your CIS Symposium was the best, and by a wide margin. Each session provided great learnings and speakers; Scott’s session with Jean-Baptiste de Franssu was incredible.”
- “Informative, interesting, great presenters, great attendees, great venue!”
- “I gained so much from the presenters and the interaction with folks around the table.”
- “Thank you for a wonderful 24 hours of education, camaraderie and some fun too!”
- “Content rich, collaborative and engaging.”
- “I appreciated the opportunity to learn more about CIS and the invaluable role you play for Catholic investors.”



### A BIG THANK YOU TO OUR PANELISTS AND PARTICIPANTS!



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