

Francis G. Coleman, CBIS Vice-Chair, and nationally recognized expert in CRI (Catholic Responsible Investing) and ESG (Environmental, Social and Governance), to retire

September 12, 2019 – Christian Brothers Investment Services (CBIS), a Catholic, socially responsible investment manager serving Catholic investors around the world, announced today the retirement of its Vice Chair, Francis G. Coleman (Frank) at the end of the year.

Over his more than 30-year career with CBIS, Frank has held numerous leadership positions within the firm, becoming a nationally recognized expert in the application of Catholic social teaching to the investment process. His deep understanding of Catholic teachings and Catholic responsible investing has contributed to his stature as an industry leader on United States Conference of Catholic Bishops (USCCB) Guidelines and Socially Responsible Investing more broadly.

Frank's contribution within CBIS itself has also been invaluable. Most importantly, he has helped CBIS put in place several key resources to ensure it always remains grounded in its mission—to work in partnership with Catholic institutions to develop socially responsible investing solutions that meet their evolving investment needs.



Francis G. Coleman

In recent years, Frank has played a crucial and instrumental role in ensuring the smooth transition of CBIS into the hands of its new CEO, Jeffrey McCroy. Commenting on Frank's role in the successful transition, McCroy had the following to say: "Having Frank by my side through the transition process was extremely helpful. Not just because of the institutional memory he was able to share with me, but because of his profound understanding of Catholic institutional investors and their unique investment needs. I can never thank him enough for helping me plant my CBIS roots, and I look forward to building on his legacy with the rest of CBIS."

As Frank steps down from CBIS, his outstanding contribution to Catholic institutions is being honored in two very special ways:

- Frank is being made an **Affiliated Member of the Institute of the Brothers of the Christian Schools**. This honor is bestowed on an individual who demonstrates a personal commitment to the mission and work of the Institute as well as an admiration for Lasallian spirituality.
- Frank has also been chosen as the recipient of the **2019 Legacy Award from the governing board of the Interfaith Center on Corporate Responsibility (ICCR)**. The Award was created to honor those whose work has provided a strong moral foundation and an enduring record of



demonstrated influence on corporate policies. The award was created in 2011 as a celebration of the 40th anniversary of ICCR.

Frank currently sits on a number of notable boards such as:

- Catholic United Investment Trust (CUIT) Board of Trustees (2015-Present), a fund family, serving Catholic institutional investors
- Georgian Court University (2011-Present), a Catholic university in New Jersey sponsored by the Sisters of Mercy; where he also was Chair of the Strategic Planning Committee (2016-2018), which lead to the development of a new strategic plan for the university “The Strategic Compass...for an even better tomorrow.” <https://georgian.edu/strategic-compass/>
- Board Member of the Montessori School of Syracuse (2001-Present)

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