

CBIS Charisms Council

Helping to Answer a Higher Calling



CBIS has always placed the highest importance on Catholic teaching and service to the Catholic market. Over the years, we've come to know that ensuring an alignment of interests between CBIS and its investors demands a two-pronged approach: Independent oversight of the traditional governance functions and an advisory body to emphasize the firm's applications of Church teaching.

CBIS' Charisms Council was formed as an advisory body to review and opine on important CBIS' initiatives that touch on the firm's application of Catholic teaching in its investment strategies. "I can't think of a better way for CBIS to maintain and continue its unique charisms of service and education to Catholic investors than the establishment of CBIS' Charisms Council," says Peter Henrich, Chief Development Officer for CBIS.

OPPORTUNITIES FOR THE COUNCIL

Advisory in nature, the Council will be a source of review and input to CBIS on key initiatives that relate to the integration of Catholic teaching into the firm's investment strategies.

In addition, the Council will provide input on curricula developed for CBIS University, the firm's educational platform. CBIS University is designed to provide information to CBIS investors, consultants, and prospective investors with access to news, insights, research, educational tools, and thought leadership. The Council will hold its first meeting on August 10, 2022 at CBIS' headquarters in Chicago.

char·ism / | 'ker-,i-zəm: A gift or talent from God given to an individual or group for the benefit of the Church and the world.

AN ASSEMBLY OF THOUGHT LEADERS

Selected by CBIS' Executive Committee, the four independent members of the Charisms Council are thought leaders in the area of Catholic moral and social teaching. Inaugural Charisms Council members are:

- **Sister Patricia Boss, OP**, Chief Financial Officer, Sisters of St. Dominic, San Rafael, California.
- **Brother Timothy Coldwell, FSC**, Director of Initial Formation of Brothers, San Francisco New Orleans District of the Institute of the Brothers of the Christian Schools, San Francisco, California.
- **Rev. Dariusz Garbaciak, SVD**, General Treasurer, Society of the Divine Word, Rome, Italy.
- **Deacon Jeff Trumps**, Chief Financial Officer, Diocese of Lafayette, Lafayette, Louisiana.

ANSWERING A CALL

According to CBIS' President & CEO, Jeff McCroy, CBIS has a particularly high calling to deliver on its commitments to Catholic investors and shareholders around the world. "By definition, charism is an extraordinary power given to us by the Holy Spirit for the good of the Church. I honestly believe CBIS' Charism Council will empower CBIS and its unique charism in ways we can't even imagine yet. We're thrilled to have such a distinguished group of people serve on the inaugural Charisms Council."