

# Mid Council Financial Conference

## November 20 – 22, 2024

North Avenue Presbyterian Church, Atlanta, GA

### Wednesday, November 20, 2024

Daily Host: Paul Grier

Church wi-fi password (Guest network): **Imaguest2019**

- |          |  |
|----------|--|
| 11:15 am | registration opens   |
| 12:00 pm | Welcome and Logistics<br>Acknowledgment of Native Lands<br><br>Greetings from North Avenue Presbyterian Church<br><i>Rev. Jasmine Evans</i><br><br>Lunch<br><br>Opening Prayer & Greetings from the Presbytery of Greater Atlanta<br><i>Rev. Aisha Brooks-Johnson, Executive Presbyter</i> |
| 1:00 pm  | Where We're Going<br><i>Scott Lumsden, Seattle Presbytery</i>  |
| 1:45 pm  | Artificial Intelligence and Stewardship<br><i>Adam Kehoe, Presbyterian Foundation</i>  |
| 2:30 pm  | Break  |
| 2:45 pm  | How to Survive a Church Capital Project: Mid Council Edition<br><i>Clare Lewis, Presbyterian Investment and Loan Program</i>   |
| 3:30 pm  | Information Technology<br><i>Ian Hall, Administrative Services Group</i>   |
| 4:15 pm  | Market and Economic Outlook<br><i>Paul Partington and Colin Cheesman, Northern Trust / Chicago, IL</i>   |
| 5:15 pm  | announcements and adjournment  |

Dinner on Your Own (*a list of nearby restaurants may be found in the attendee packet*)

***this draft dated 11/12/2024***

## Thursday, November 21, 2024

Daily Host: Clare Lewis

Church wi-fi password (Guest network): **Imaguest2019**

|          |   |
|----------|---|
| 8:00 am  | coffee and pastries available   |
| 8:30 am  | Devotional<br><i>Rev. Julie Bailey, Columbia Theological Seminary</i>   |
| 8:45 am  | Asset Allocation & Diversification: the Cornerstones of Your Financial Plan<br><i>Adriana Ballard, Presbyterian Foundation</i>  |
| 9:30 am  | Congregational & Mid-Council Insurance Issues<br><i>Steve Pardue, CountyBanc Insurance Services, Inc. / Greenwood, SC</i>   |
| 10:30 am | Break   |
| 10:45 am | Foundation's Partnership with Foundry Commercial<br><i>Paul Grier &amp; Olanda Carr, Presbyterian Foundation</i><br><i>Matt Messier &amp; Carlin Beekman, Foundry Commercial / Orlando, FL</i>  |
| 11:30 am | "Hot Topics" Panel Discussion <ul style="list-style-type: none"><li>• <i>Rev. Dr. Byron Wade, Presbytery of Western NC</i></li><li>• <i>Rev. Dr. Craig Howard, Chicago Presbytery</i></li><li>• <i>Rev. Cindy Kohlmann, New Castle Presbytery</i></li><li>• <i>Rev. Richard Williams, Presbytery of South Louisiana</i></li></ul> |
| 12:15 pm | Lunch and Table Talk  |
| 1:15 pm  | PC(USA) Funding Model Development Team<br><i>Rev. Dr. Michael Wilson, Team Co-Moderator, Presbytery of Donegal</i><br><i>Valerie Young, Team Member, Synod of the South Atlantic</i>  |
| 2:15 pm  | Break   |
| 2:30 pm  | Legal Update<br><i>Cory Halliburton, Freeman Law / Frisco, TX</i>   |
| 4:30 pm  | announcements and adjournment   |
| 6:00 pm  | buses depart hotel for dinner @ Ponce City Market eateries  |
| 8:15 pm  | buses depart Ponce City Market to return to hotel   |

***this draft dated 11/12/2024***

**Friday, November 22, 2024**

Daily Host: Jason Peterson

Church wi-fi password (Guest network): **Imaguest2019**

|          |  |
|----------|--|
| 8:30 am  | Devotional<br><i>Rev. Dr. Clayton Thomas, Presbyterian Investment &amp; Loan Program</i>   |
| 8:45 am  | Enterprise Risk Management<br><i>Robert Hay, Columbia Theological Seminary</i>   |
| 9:30 am  | Property Planning<br><i>Rev. Dr. Patrick Duggan, Executive Director</i><br><i>United Church of Christ Church Building &amp; Loan Fund / Cleveland, OH</i>  |
| 10:15 am | Break  |
| 10:30 am | Five Superpowers Every Great Financial Advisor Should Have<br><i>Angela Duffy, Brad Masters, &amp; James Carey, New Covenant Trust Co.</i>   |
| 11:30 am | Panel Discussion: "Here's what we're seeing on the horizon ..."<br><i>Clare Lewis &amp; Jason Peterson, Presbyterian Investment &amp; Loan Program</i><br><i>Paul Grier &amp; Olanda Carr, Presbyterian Foundation</i> |
| 12:15 pm | announcements and adjournment  |

CONFERENCE ENDS

## **HOLD THE DATE FOR 2025**

Mid Council Financial Conference  
November 19 to 21, 2025  
Fourth Presbyterian Church  
Chicago, Illinois

*this draft dated 11/12/2024*