

PRESENTERS

MARC DOSS, Regional Chief Investment Officer for Wells Fargo Private Bank. He leads a team of investment professionals who deliver comprehensive, custom, diversified portfolio management for clients of The Private Bank. In his role, Mr. Doss serves as the investment thought leader in the region by providing insight and interpretation of the economy and financial markets at client events and through written commentary. He serves on the Wealth Investment Policy and the Fiduciary Oversight Committees. 858.5974420, marc.a.doss@wellsfargo.com

PATRICK THUESON, Vice President and Chief Financial Officer of Lutheran Social Service of Minnesota, is the chair of the LFMA Board of Directors. He oversees Finance, Accounting, Communications, Information Technology, Compliance and Integration for LSS of MN. Patrick received his bachelor's degree in Accounting from the University of St. Thomas in St. Paul, Minn.

TOM MCLAUGHLIN, President and CEO, McLaughlin & Associates. Mr. McLaughlin has more than 35 years of non-profit experience as a nonprofit manager, trade association executive, and management consultant. He is a contributing editor for the Nonprofit Time. Tom is nationally recognized as an expert in nonprofit mergers and alliances, having consulted to nonprofits in more than 250 such collaborations. He also is recognized as an expert in nonprofit strategic positioning, financial management, and organizational restructuring. 617.549.9611, tamclaughlin@comcast.net

TERRY PAULSON, PhD, CSP, CPAE. Dr. Terry Paulson is a Ph.D. psychologist, national columnist, professional speaker and author of the popular books, "The Optimism Advantage" and "They Shoot Managers Don't They?" He has been inducted into NSA's Speaker Hall of Fame along with Ronald Reagan, Colin Powell and Zig Ziglar. He has an MA in Theology from Fuller Seminary, and is on the board of Lutheran Social Services of Southern California. 818.991.5110, terry@terrypaulson.com

JOHN KELLEY, President of the Great Lake Region at Securis Group. Mr. Kelly's passion is to help individuals and companies increase their IT security profile through best practices in technology, process and people. Combining industry-leading products and highly skilled professional services teams, Securis helps its customers move from a reactive to proactive IT security management approach. 248.837.1400, jkelley@securisgroup.com

ERIC EDER, CEO of Securis Group. Mr. Eder holds a Chartered Financial Analyst (CFA) designation from the Association for Investment Management and Research. He also holds a bachelor's degree with distinction from the University of Michigan and a Masters in International Management from Thunderbird, The American Graduate School of International Management. He is the CEO at Securis Group where he leads a talented group of information security professionals in providing exceptional quality services for clients. eeder@securisgroup.com

BARED DILACAR, Assurance Principle at CliftonLarsonAllen. Mr. Dilacar is a CPA with broad experience in accounting, auditing, tax and consulting. He has direct experience with nonprofits, employee benefit plans and investment companies. He is often called upon to consult in the areas of internal control, financial disclosures and reporting, tax and charitable legislation compliance, and improving business and accounting processes because of his considerable accounting and tax knowledge. 626.793.3600, bared.dilacar@CLAconnect.com

HAROLD PARSONS, Principal at CliftonLarsonAllen. Mr. Parsons has over 30 years serving nonprofits and governments. He has headed up the firm's religious and foundation practices and has helped implement the Affordable Care Act reporting process for clients and has helped denominations deal with the complex ACA regulation. 612.397.3058, Harold.parsons@CLAconnect.com.

DANA SMITH, Founder and President of Exalt Resources, LLC. Ms. Smith received her B.A. from the University of California Los Angeles and is a frequent speaker for various organizations that provide HR resources and guidance to business owners. A philanthropist at heart and driven by her passion to serve, Ms. Smith has expanded her business by focusing her efforts on not-for-profit clients. Ms. Smith is a 2013 Iota Phi Lambda Gamma Mu Chapter Business Woman of the Year recipient and a blogger for the Huffington Post. 562.920.2853 x1150, dsmith@exaltresources.com

LFMA

38th Annual Meeting & Conference

October 9 - 11, 2016

Catamaran Resort Hotel & Spa
San Diego, CA

Major Sponsors

PORTICO[®]
Benefit Services | A Ministry of the ELCA



Mission Investment Fund
Evangelical Lutheran Church in America
God's work. Our hands.

 **HAWLEY & ASSOCIATES, LLC**
Protecting Your Mission

Sunday, October 9

5pm	Welcome	Boardroom
5:30pm	Reception Networking <i>Hors d'oeuvres, cash bar</i>	

Monday, October 10

8am	Announcements Patrick Thueson, LFMA Board Chair	Boardroom
	Devotions Pastor David Nagler, Christ Lutheran Church, Pacific Beach	
8:15am	The Economic Outlook Marc Doss, Regional Chief Investment Officer, Wells Fargo Private Bank	
9:45am	Break	
10am	Growth/Discontinuation Matrix Patrick Thuesen, LSS of MN	
10:30am	Growth: Methods and Strategies Tom McLaughlin, McLaughlin & Associates. Contributing Editor, The NonProfit Times	
noon	Lunch Sponsored by Portico & Mission Investment Fund	Rousseau Suite
1pm	Considerations for Growth Right-sizing/Discontinuation Cultural Issues with Terry Paulson, Paulson and Associates, Inc.	Boardroom
2:30pm	Networking Break	
3pm	Panel-Led Breakout Session – Collaboration/Growth in Challenging Environments	
4:30pm	Free Time	
6pm	Dinner on the Beach	

Tuesday, October 11

8am	Announcements, Devotions Patrick Thueson, LFMA Board Chair	Boardroom
8:30am	Interactive Session on IT Issues – Effective Data Breach Responses John Kelley, Securis Group, LLC Eric Eder, Securis Group, LLC	
10am	Break	
10:15am	Accounting Updates – New FASB Standards Bared Dilacar, MBA, CPA, Principal Nonprofit, CliftonLarsenAllen LLP Harold Parsons, CPA, Principal Nonprofit, CliftonLarsenAllen's Public Sector group	
11:45am	Lunch Sponsored by Hawley & Associates	Rousseau Suite
1pm	New Federal Overtime Rule & How to Prepare Your Organization Dana Smith, President/CEO, Exalt Resources	Boardroom
2:30pm	Annual Meeting	
3pm	Drawings – Ben Franklin Award	

LFMA MISSION

To enable and support the continuing improvement of fiscal management services in Lutheran affiliated/recognized service ministry organizations by providing a vehicle and forum where people in the industry can join together for common sharing and educational experiences.