



## Journey to a Secure Future

### ViaGem Foundation Program



was established to provide religious, church, and other nonprofit organizations in financial need and in developing areas with professional assistance including:

- Financial planning, education and training
- Organizing and designing various types of investment programs
- Implementing, coordinating and monitoring ongoing programs
- Other investment and financial management

**ViaGem's mission is to better enable leaders to serve their organizations.**

#### Why we do what we do?

We are dedicated to the global standards of excellence in our profession and enthusiastically committed to helping and enabling our clients to succeed. We are privileged to work side by side with them, as trusted advisors, to develop and carry out important plans and decisions affecting the future of their organizations and the people they serve.

# Ask yourself...

## For organizations in need in developing areas around the world who are working with limited funds, and/or anticipate receiving funds from outside sources in the near future.

Have we developed a financial plan/sketch to address our specific needs or prepared a case statement for requesting additional financial support for special projects/programs?

Do we have a process for receiving and accumulating funds that is efficient and timely, and avoids common pitfalls: long delays, excess costs/fees and extra risks through exchanges?

Are the funds organized and secure, and have we prepared guidelines for investing which match our objectives and planned utilization of the funds?

Do we have knowledge, experience, and skills to prudently manage these assets and oversee the process ongoing to optimize returns and provide liquidity as needed?

Do we have a method for monitoring and reporting information about the sources and uses of funds, so that the best interests of all parties are served over the long-term?

## For financially stable organizations who anticipate allotting and distributing funds to support organizations, programs, projects, or missions outside their own.

Do we have a good sense of our organization's financial needs for the future, where and how much excess funding could be available for alternative investments or contributions?

Do we have a decision making criteria as to who will receive funds, and for what purpose? Do we have a structure for allotting, distributing, and monitoring funds to be used to fulfill our mission/objectives and the needs of the recipient(s)?

Are we confident, that during and after the transfer of funds, each recipient will prudently manage and utilize the funds, avoiding excess fees/costs and hidden risks which dilute principal amounts?

Do we have an appropriate communication process in place to share the purpose of our alternative/community investments and contributions which are intended to help others in need?

**Our contacts in and around the world of religious and nonprofit organizations provide us with access and resources that help make fruitful connections. ViaGem can assist both types of organizations mentioned above to help: organize, formalize, implement, and monitor programs to accomplish specific needs, goals, and dreams.**

*As an independent third-party professional, ViaGem brings objectivity and impartiality to the situation, which leads to sound judgment, fresh ideas and collaborative solutions.*

## Experience ViaGem

ViaGem, LLC is a Registered Investment Advisor.

(The word "ViaGem" is of Portuguese origin meaning "Journey.") Since the early 1980s, members of the ViaGem team have worked with numerous religious congregations and communities, church entities, and/or nonprofit organizations located in all major regions of the world on their investment and financial management matters.

Stephen L. Zielinski, CIMA, AIFA, AVA



Steve is President and a Senior Consultant. Since graduating with a Management Sciences degree from St. Louis University, he has devoted his professional career to serving the specialized needs of religious communities, church and other mission-based organizations around the world.

## Related industry certifications, licenses and affiliations:

- Certified Investment Management Analyst (CIMA)—The Haas School of Business at the University of California, Berkeley
- Accredited Investment Fiduciary Analyst (AIFA)—Center for Fiduciary Studies
- Designated Investment Advisory Officer—NASD Series 7, 63, and 2; NSAA Series 65
- Investment Management Consultants Association (IMCA) Endowments and Foundations Certificate—The Wharton School of the University of Pennsylvania
- Accredited Valuation Analyst (AVA)—National Association of Certified Valuation Analysts (NACVA)
- Twenty years of banking experience as outside legal director and loan, investment and audit committee member
- Interfaith Center on Corporate Responsibility (ICCR)
- Participant in the Poverty and Capital Conference at the University of Manchester, United Kingdom
- Atendemos en Español

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