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Professional Positions and Summary of Ongoing Accomplishments

Currently, Steve is President and Senior Consultant/Analyst for ViaGem, LLC, a Registered Investment Advisor (IA). Since graduating from St. Louis University, he has devoted his professional career to serving the specialized needs of religious institutes, church, and other mission/faith-based organizations around the world.

For 22 years, Steve was a member of the Executive Committee, Management, and Service Teams of an international professional services firm offering CPA, Management Consulting, and Investment Advisory Services to religious, educational, and charitable organizations.

His primary responsibilities were to perform consulting and advisory services for clients regarding their investment, financial, and management needs helping them to achieve success in their organizations. Specific service functions included: financial analysis, investment management and consulting, and organizational management consulting.

ViaGem, LLC was established in 2006 as an independent IA firm to focus specifically on Investment Consulting and Fiduciary and SRI services to better help organizations address their needs and accomplish their goals and missions.

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) Endowment and Foundations Certificate – The Wharton School of the University of Pennsylvania

Accredited Valuation Analyst (AVA) – National Association of Certified Valuation Analysts (NACVA)

Participant at the conference on Poverty and Capital at University of Manchester, U.K.

Director of Southwest Bank, St. Louis, MO

Member and Former Board Member of Entrepreneur's Organization (EO)

Licensed Real Estate Broker State of Missouri

Bank Chairman, Audit Committee Chairman, Director, Loan Committee Member, Investment Committee Member for Missouri State Bank, 1994-2006

Director of TrustCorp Financial, 1994-2006

Finance Commission Member of Chicago based Religious Order, 2001-04

President/Director of St. Louis University Business School Alumni Association, 1996-99

Finance Committee Member Missouri Athletic Club, 1990s

Bachelor of Science – St. Louis University Business School in Management Sciences