



The Association of Treasurers of Religious Institutes

30th

presents the

ANNUAL
CONFERENCE

Reaching for the Stars

September 29 to October 2

2017



The little girl looked at the
Star and began to cry.



The star asked her,
"Why are you crying?"



The girl answered,
"You are too far away.
I shall never be able to
reach you!"



And the star
replied,
"O little one, if I
were not already in
your heart, you
would
not be able to see

Me.

John Magliola

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Delta Montreal Hotel

475 Avenue du Président-Kennedy

Montréal, QC H3A 1J7

1-844-860-3753

Weblink for registration: [Book your group rate for ATRI 30th Annual Conference](#)

Dear Registrant:

Welcome to ATRI's 30th Annual Conference: This year we will be exploring the theme—*"Reaching for the Stars"*. This theme and story reflect the hopeful, sacred in between realities as we continue to look at what is possible on our journey of life. Sister Nancy Schreck, OSF will ground our conference by highlighting how in our various roles we need to be people of hope. Father Frank Morrissey, OMI will bring us up to date on the canonical issues facing religious institutes.

We will also offer practical workshops to assist and challenge us in our various ministries as treasurers, leadership and financial people in our religious communities.

This year the following will be included in your registration fee thanks to the generosity of the many sponsors of our conference:

- 1 Substantial Social (**this will be on Friday night so please eat a "Lite" supper**)
- 3 Breakfasts
- 4 Nutrition Breaks
- 2 Lunches
- Banquet & Entertainment

Conference Registration Fees:

Before August 4, 2017:	\$ 350.00 (for the 1st person)
	\$ 300.00 (for the 2nd person)
	\$ 275.00 (for any additional people)
After August 4, 2017:	\$ 375.00
Non-Member:	\$ 400.00

Deadline for Registration: August 4, 2017

EARLY BIRD DRAW!!!!

EARLY BIRD SPECIAL!!! Those who register at the Delta Montreal Hotel before **JULY 7, 2017** will have their names placed in a draw for accommodations for a 1 night stay the Delta Montreal Hotel, gift certificate.

So book your hotel room early!!

The Conference Logo was created by Sylvie Lavoie who works with the Sisters of Providence in Montreal.
We are grateful to her for sharing with us her creative talent.

Conference Speakers



Sister Nancy Schreck, OSF—a Sister of St. Francis of Dubuque, IA is currently the Program Director at Excel Inc. a community service organization located in Okolona MS. She has previously served in Leadership and Formation ministry in her Congregation, as well as in the LCWR Presidency and as a U.S. Delegate to the International Union of Superiors. Working both nationally and internationally Nancy speaks and facilitates for a variety of religious groups. Her educational background is in Biblical Studies with advanced degrees from Boston College, and the Pacific School of Religion.

Presentation 1: "Honoring the Dark, Seeking Light"—Will look at religious life in this challenging time. The reflection will focus on the experience of living religious life in uncertain times, explore some suicidal behaviors, and challenge the group to the refining fire of identity. It will use images of darkness and light as metaphors for this exploration.

Presentation 2: "Following the North Star"—the final talk of the event will look at what gives vision and hope not only to members of religious institutes but to the larger church and world as men and women religious seek to be faithful to living religious life in a radically different context. The talk will explore what it is that gives guidance and vision to such an undertaking.



Father Morrissey was ordained a priest in 1961 for the Missionary Oblates of Mary Immaculate. Most of his life as a priest has been identified with the Faculty of Canon Law of Saint Paul University, Ottawa. He has also served as Consultor and as Member on various Vatican dicasteries and commissions. Likewise, as consultant for many religious institutes in North America and elsewhere throughout the world. He is invited to speak regularly at conferences, and has responded to speaking invitations in some 50 countries.

He will speak on: **"Some contemporary canonical issues facing religious institutes"**. Canonical issues facing religious institutes these days seem to revolve around areas of finance, new members, elections, the status of the community itself, legacy planning, etc. He will address a number of issues relating to these themes, particularly the current status of the 2013 Vatican norms for financial administration in religious institutes, issues relating to postulation for a further term of office, the acceptance of candidates who have been previously married, situation of members who are transferring from one institute to another, various forms of legacy planning, and so forth.

WORKSHOP PRESENTERS

THE ATRI RESOURCE MANUAL COMMITTEE: Sr. Noreen Allossery-Walsh; Tafa Burd; Philomena Kavanagh; Andy Praksas, chair; Jacqueline Small; and Sr. Linda Thompson, are religious and lay-collaborator members with a cause: 'keeping the ATRI Resource Manual a living document.. " Since receiving the ATRI Resource Manual, the committee members have been curious whether ATRI members have been utilizing the document, making it available to new staff and/or aware of changes made to the document.

AARON BENNETT, CFA—is a Partner and Senior Research Analyst at Jarislowsky Fraser, covering North American Energy and Forestry Products equities. He has been at the firm since 2014 and has more than 15 years of investment experience. With a deep expertise in ESG investing, Aaron is a member of the firm's Sustainable Investment Committee and helps support the coordination of sustainable investing activities and the development of ESG tools across the firm. He is also a member of the Advisory Committee for the PRI-coordinated ("Principles for Responsible Investment") collaborative global engagement on methane risk. Prior to joining Jarislowsky Fraser, Aaron worked for the Ontario Teachers' Pension Plan in a variety of related roles for the Natural Resources sector and was a founding and active member of the organization's Responsible Investing Committee.

TERRY CARTER, B.A., LL.B, TEP, TRADE-MARK AGENT – is the Managing Partner of Carters, Mr. Carter practices in the area of charity and not-for-profit law, and is counsel to Fasken Martineau on charitable matters. Mr. Carter is a co-author of Corporate and Practice Manual for Charitable and Not-for-Profit Corporations (Carswell), a co-editor of Charities Legislation and Commentary (LexisNexis Butterworths, 2017), and co-author of Branding and Copyright for Charities and Non-Profit Organizations (2014 LexisNexis Butterworths). He is recognized as a leading expert by Lexpert and The Best Lawyers in Canada, and is a Past Chair of the Canadian Bar Association and Ontario Bar Association Charities and Not-for-Profit Law Sections. He is editor of www.charitylaw.ca, www.churchlaw.ca and www.antiterrorismlaw.ca. and www.antiterrorismlaw.ca.

KAREN COOPER—A partner with the firm, Drache Aptowitzer LLP, Ms. Cooper is recognized as a leading expert by Lexpert and Best Lawyers practicing charity and not-for-profit law with an emphasis on tax issues, having formerly been a Senior Rulings Officer with the Income Tax Rulings Directorate of Canada Revenue Agency, as well as former counsel for the Department of Justice in tax litigation. Ms. Cooper also has considerable teaching experience, including part-time professor at the University of Ottawa, Faculty of Common Law, and is a contributing author to "The Management of Charitable and Not-for-Profit Organizations in Canada" (LexisNexis Butterworths). She is currently the Chair of the Canadian Land Trust Alliance and Vice-Chair of her local hospital.

DOROTHY FREYMOND—has had the distinct pleasure of working for the Congregation of the Sisters of St. Joseph since 2005. Her office is at the Peterborough site although present in all four of our locations from time to time. She has been married to her husband for over 30 years and they have 3 "emerging" adult children.

FREDERIC LASSERRE—is a Professor since 2001 in the Department of Geography at Laval University (Quebec), and researcher at the Hydro-Québec Institute in environment, development and society (IEDS). He also acted as Project Director with the ArcticNet research network (2010-2015). He is also researcher with the Institut québécois des Hautes études internationales (IQHEI). With his book *L'éveil du dragon. Les défis du développement de la Chine au XXI^e siècle* (Presses de l'Université du Québec) [*The awakening of the dragon. The challenges of development in China in the 21st century*], he won the HEC Best Business Book Award 2006. He conducted extensive research in the field of water management and on Arctic geopolitics, and published 17 books and over 100 refereed articles. He chairs the Conseil québécois d'Études géopolitiques (CQEG) at Laval University.

Conference Speakers continued

JULIAN MAYO—has been with Charlemagne Capital (UK) Limited, the specialist emerging markets fund manager, since 2003 and serves as co-Chief Investment Officer. Charlemagne is now part of Fiera Capital and allows Fiera to offer a full suite of Emerging and Frontier Market-focused strategies to its diverse clientele. Julian has over 30 years' investment experience, most of which has been focused on emerging markets and which includes 12 years working in Asia. Julian started his career in Hong Kong with Schrodgers and also worked for Thornton Management (now part of Allianz Global Investors) and Regent. Julian has a degree in Economics from Bristol University.

JOHN P. RUETZ—has held a variety of senior leadership positions which have taken him on a journey across the healthcare continuum. These various roles have focused on implementing strategy and leading major change initiatives. John is currently President & CEO of Catholic Health Sponsors of Ontario, which is the sponsor of 21 health care organizations located in 10 cities in Ontario. John is also CEO of the newly formed Catholic Congregational Legacy Charity, which was formed to safeguard assets for the long term use of Catholic works. John has held senior leadership roles at the Waterloo Wellington Local Health Integration Network, Bridgepoint Hospital in Toronto, St. Peter's Health System in Hamilton and the Hamilton Community Care Access Centre. John holds an Honours Bachelor of Economics from Wilfrid Laurier University, and a Master of Health Sciences from the University of Toronto. He is a certified management accountant, a Certified Health Executive, and was awarded a fellowship in the Executive Training for Research Application program through the Canadian Health Services Research Foundation.

GILLES SAUCIER—acts as president and senior consultant at ODEVOS conseils et formation, a consultant firm specialized in human resources, career and diversity management. In 35 years of practice, he worked in institutional, manufacturing and services sectors, within public, private and ecclesial organizations, in an unionized context or not. Having implanted or managed the human resources department in several organizations, Gilles Saucier distinguishes himself by his experience in organizational development and strategic HR management, enriched by an expertise regarding cultural and religious diversity. During the downsizing of a religious congregation entailing major lay offs, he managed the human resources issues, which was then recognized for its exemplary nature by the Quebec Ministère de l'Emploi et de la Solidarité sociale as well as the Commission des partenaires du marché du travail.

RENE VEILLETTE—leads the Montreal Client Relations team. He is responsible for servicing institutional clients in Canada and the United States including 21 specialty currency mandates with a notional market value of \$12 billion. Prior to joining CIBC Asset Management's predecessor firm in 1990, Mr. Veillette spent six years at Confederation Life. He was responsible for client servicing and business development for pension plans. Mr. Veillette holds a Bachelor of Commerce degree from McGill University. He is also a CFA charterholder and a holder of the right to use the Chartered Alternative investment Analyst designation.

GREG WALSH—served as Director of Finance of the Sisters of Charity, Halifax, Nova Scotia for over twenty-six years. Prior to this, for fifteen years, he was a member of the accounting faculty in the School of Business at Saint Mary's University in Halifax. He earned his C.A. while working with the predecessor firm of KPMG. Over the years, Greg has made numerous presentations to various groups.

WORKSHOPS

1. "SUSTAINABLE INVESTING AND ESG INTEGRATION"—Aaron Bennett, CFA

Sustainable investing involves an analysis beyond short-term profits, favoring instead factors that support long-term value creation. A company's Environmental, Social and Governance (ESG) policies and track record are likely to be a helpful lens through which to gauge quality. How these risks and opportunities are included in investments is evolving, and we will discuss different approaches.

2. "GEOPOLITICS AND ECONOMIC RISK ANALYSIS"—Frederic Lasserre

The multiplication of crises in several regions of the world is admitted by public and private actors. Several experts analyze it as a return of geopolitical stakes. Others point out that these geopolitical rivalries never disappeared. The economic actors wishing to carry out activities abroad have clung to the analysis of economic and financial factors. These leaders now realize that the geopolitical context of countries where they want to invest is decisive in the assessment of economic risks.

3. "A LOOK AT THE ATRI RESOURCE MANUAL - REDISCOVERING A HIDDEN GEM"—the ATRI Resource Manual Committee

The ATRI Resource Manual Committee, approved by the Board of Directors, January 2016, has been working in the background, via Skype meetings and email. Hoping to keep the ATRI Resource Manual one of the main desk resource tools in the finances offices of religious congregations, the committee has researched new documents for inclusion either in the ATRI Resource Manual or in the ATRI Resource Library. The presentation will go through sections of the manual, and though specific questions asked of the committee; answering possible "what if's".

4. "LEGAL ISSUES IN SOCIAL MEDIA AND RELATED POLICIES"—Terry Carter

All charities, including religious charities, face legal challenges in using social media. This session will explain some of the key legal issues with using social media, including privacy issues, CRA regulatory issues, and intellectual property issues. Common reasons and pitfalls of using social media will be covered, as well as social media and privacy risk management strategies. Social media can help religious charities accomplish their missions. This session will discuss the importance of a proactive approach to minimizing any potential risks before embarking on social media campaigns. Managing the risk associated with social media involves ensuring various procedures and policies are in place prior to using social media.

The following topics will be covered:

- Why Social Media Matters
- Benefits of Using Social Media
- Pitfalls of Using Social Media
- Privacy Issues with Using Social Media
- CRA Regulatory Issues with Using Social Media
- Intellectual Property Issues with Using Social Media
- Other Legal Areas of Concern
- Social Media Risk Management

(workshop choices continued on next page)

WORKSHOPS continued

5. "HOW TO MANAGE THE RISK OF FOREIGN CURRENCY EXPOSURE?"—Rene Veillette

The presentation will consider the impact of foreign currency on a balanced portfolio and why managing currency risk is important. He will discuss the pros and cons of alternative approaches to managing currency risk and introduce "Currency" as an asset class that can potentially generate an uncorrelated source of return.

6. "A STRATEGIC STAKE FOR RELIGIOUS COMMUNITIES (The retention of employees and the preservation of their sense of loyalty during major organizational transformations)" —Gilles Saucier

Religious congregations share with their employees characteristic values which defines their mutual relations. Confronted with important downsizing stakes, they are called to wonder about the way they plan to handle the important impacts which these transformations will have. Beyond the usual best practices, hides an opportunity which the congregations can seize only once: how to live in a community and Christian way the inevitable bereavements and sufferings which will ensue from upheavals to come?

7. "AN OVERVIEW OF THE CATHOLIC CONGREGATIONAL LEGACY CHARITY"—

John P. Ruetz

The Catholic Congregational Legacy Charity (CCLC) was formed in 2016 for the purpose of safeguarding assets for the long term use of Catholic works. Participants will learn how CCLC: provides another option for Congregations making decisions about the future ownership of stable patrimony; is developing capacity to manage assets such as land, building, and endowments; is structured as a Church entity under the auspices of a pontifical Public Juridic Person, and as a Canadian civil corporation with charitable status.

8. "CURIOUSIER AND CURIOUSIER—ALICE PONDERES A FINANCIAL REPORT"—

Greg Walsh

Like Alice, who had a good deal of trouble making any sense of Wonderland, many people find Accountingland to be a strange and non-sensical place. This workshop will attempt to help you make sense of financial reports. The focus will be on the conceptual framework that serves as the underpinning of financial reporting. By examining the objectives, assumptions and principles behind financial reporting, attendees should leave the workshop with a better understanding of the information, including its deficiencies, contained in financial reports.

9. Workshop 9—(this time is set aside for Lay Collaborators only)— facilitated by Ian Welton

Topics that will be addressed during this session are: How do the jobs in the finance office change after the congregation goes through a transition? and Does congregational downsizing affect the lay collaborators? How? A panel discussion of 4 or 5 members who have, or are experiencing, these situations, at different stages, will express how they have managed through to this point in time. As well, there will be the usual taking of questions from the floor.

(workshop choices continued on next page)

WORKSHOPS continued

10. "CHARITY LAW UPDATE - FOCUS ON MERGERS AND AMALGAMATIONS"—Karen Cooper

This presentation will provide an update on charity law and CRA issues of relevance to religious institutes including recent legislative changes, CRA publications and caselaw. Part of the presentation will also focus on some of the civil law issues and processes relevant when religious institutes deal with fundamental changes such as mergers, amalgamations and dissolutions, including some key considerations and best practices.

11. "CHANGE MANAGEMENT—MANAGING CHANGE BEFORE IT MANAGES YOU!"—Dorothy Freymond

Heraclitus, a Greek philosopher, is quoted as saying "change is the only constant in life." For many of us, at some moments, this seems all too true. Managing change includes preparing with purpose, mitigating and managing stress, engaging and empowering people, defining or redefining culture, and above all else, patience. This presentation will speak to the people side of change rather than the legal or business aspects of change.

12. "OVERVIEW OF EMERGING & FRONTIER MARKETS"—Julian Mayo

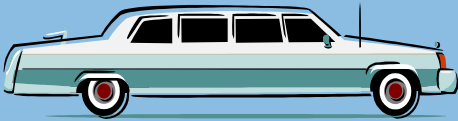
As investors seek additional diversification and additional sources of return, the Emerging and Frontier Markets represent compelling investment opportunities. Our discussion will focus on explaining the key characteristics of Emerging and Frontier Markets, while highlighting the differences between both and with developed markets. We will also provide a comparative analysis on the advantages as well as the risks associated with these asset classes while elaborating on specific countries to illustrate the dynamics that prevail and how they impact investors. The discussion will conclude on an assessment of the current Emerging/Frontier Markets investment landscape and why we believe that the time is right to invest in these markets.



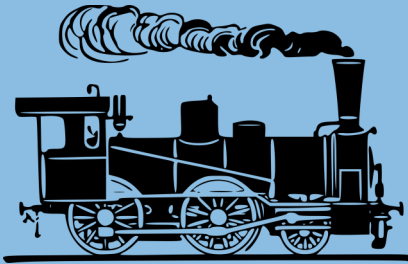
**Travel Information from the Airport
(the hotel is about 30 minutes away)**



Taxi cost: approx. \$40.00 —one way (tip is extra).



Limo approximately \$55.00-\$60.00 a car.



The train goes to downtown Montreal (address: 895 Rue de la Gauchetière O, Montréal, QC H3B 2M9) and it is about an 8 minute ride from there by taxi to the hotel.

Deadline for Registration: August 4, 2017

Withdrawal: If you are unable to attend, substitution is accepted with a written or fax notice to the ATRI Office by **September 5, 2017.**

Cancellation: Registration Fee less \$75.00 administration fee will be refunded if a written notice of cancellation is received in the ATRI Office no later than **September 5, 2017.**

Please send to:

ATRI

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Tel: (416) 429-7331 Fax: (416) 429-7356

E-mail: atris@look.ca Website: www.atri.on.ca

Hotel Information

YOU MUST REGISTER WITH

Montreal Delta Hotel

Hotel Registration phone-in number: 1-844-860-3753

When booking by telephone please use the code block name: **AT1**

to ensure you receive the appropriate rate and are included in the guestroom block

OR

You can also register via the internet at this link: [Book your group rate for ATRI 30th Annual Conference](#)

If you are arriving early or staying later for the conference please contact the hotel directly at the number above or register on-line so that you can receive a conference rate for the extra days.

This hotel is “smoke-free.”

The Delta Montreal is offering a Conference rate of:

Standard Room (single or double): **\$164.00 (plus taxes)**

(Complimentary internet access in all of the bedrooms)

All reservations must be made by August 4, 2017 in order to guarantee a room at the Conference rate.

**PLEASE NOTE: ALL RESERVATIONS MUST BE MADE THROUGH THE REGISTRATION NUMBER OR
INTERNET INFORMATION PROVIDED ABOVE.**

Check-in Time is 3:00 p.m. and Check-out Time is 12 noon. Guests arriving before 3:00 p.m. will be accommodated as soon as rooms become available.

PARKING: Parking is available for \$26.50 a day.

Conference 2017 Schedule

Friday, September 29, 2017

4:00-6:00 p.m.	Registration
7:00-8:00 p.m.	Welcome and Opening Ritual Social

Saturday, September 30, 2017

7:00-8:30 a.m.	Breakfast
8:40-8:50 a.m.	Announcements
8:50-9:15 a.m.	Prayers
9:15-10:15 a.m.	General Session--Nancy Schreck, OSF
10:15-10:45 a.m.	Nutrition break
10:50-11:50 a.m.	<u>Workshops</u>
12:00-2:00 p.m.	LUNCH
2:00-3:00 p.m.	<u>Workshops</u>
3:00-3:30 p.m.	Nutrition break
3:30-4:30 p.m.	AGM
5:00-6:00 p.m.	Mass in the Hotel Supper on your own

Sunday, October 1, 2017

7:00-8:30 a.m.	Breakfast
8:40-8:50 a.m.	Announcements
8:50-9:15 a.m.	Prayers
9:15-10:15 a.m.	General Session—Frank Morrissey, OMI
10:15-10:45 a.m.	Nutrition Break
10:50-11:50 a.m.	<u>Workshops</u>
12:00-2:00 p.m.	Lunch and Lay Collaborators Lunch
2:00-3:00 p.m.	<u>Workshops</u>
3:00-5:45 p.m.	Touring the city and free time are on your own
6:00-8:30 p.m.	Banquet in the hotel

Monday, October 2, 2017

7:00-8:30 a.m.	Breakfast
8:40-8:55 a.m.	Announcements
8:55-9:55 a.m.	General Session--Nancy Schreck, OSF
9:55-10:25 a.m.	Presentations and expressions of gratitude Closing Ritual
10:25 a.m.	Nutrition break and box lunches for those who are travelling

Departure and safe journey to all!!

Our Sponsors

Our Annual Conference has been sponsored by a number of companies and individuals who very generously supported our event. We are very grateful for their contributions and wish them well in all of their future endeavours.

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