

A Glance Back



1960

★
2020

A Vision Forward

Happy Anniversary Christian Brothers Services





Change is a constant in life.

In the 60 years since Christian Brothers Services (CBS) opened its doors, the world has changed in every imaginable way. The manner in which we run our business has changed. From the tools we use in our everyday activities to our communication channels, almost everything has evolved.

One aspect of CBS that has not changed is the character of our employees. While the people who have worked at CBS over the past 60 years have changed—some retired, others moved on to new endeavors—the type of person who works at CBS has not. The individuals who work at CBS invariably possess a unique dedication to the company’s mission, and a passion for helping our members fulfill their missions.

This anniversary book highlights CBS’ 60-year history through the lens of those who made CBS what it is today: our employees. These are the people who built CBS day-by-day through the years, and who are committed to moving us forward for the next 60 years and beyond. They play a critical part in why we have survived and thrived for this long.

So, as we glance back and celebrate our 60-year anniversary, we affectionately reflect on the people who shaped CBS.

With our vision forward, we look with excitement to all the wonderful places we will go together.

Enjoy!



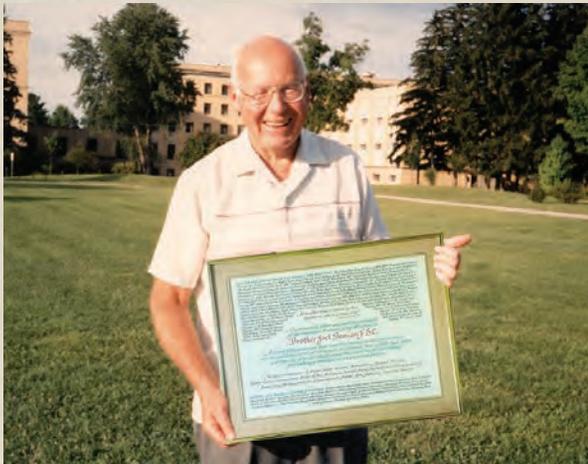
Remembering Brother Joel Damian

Brother Michael Quirk, FSC, Ed.D - CBS President and CEO

My first memory is when I interviewed with him for a job at Christian Brothers National Office (the predecessor to Christian Brothers Services). He was candid, direct, professional and personal. I never saw him upset over either a situation or individual. His opening line was always, “what can I/we do for you,” and his closing line was always, “glad to be of service.” Despite constant travel and meetings, he always made sure he was back in the Brothers’ community so he could prepare and cook Sunday dinner for the Brothers. He had no private office; his desk (piled high with paper) was out in the open like everyone else. Despite his role and tremendous impact, he remained a humble person.

I recall in the early days of the Risk Pooling Trust (1979) I received a notice from attorneys who were filing suit against one of our members, and asking for \$1 million in damages. It was the first time I had encountered a claim of this amount and with much nervousness brought it to his desk. His response? He told me to call them back and tell them to get in line; they were not as special as they thought they were.

He was not fond of attorneys or auditors, not because he was doing anything improper, but I felt he wanted to explore all avenues and solutions and sometimes felt hindered by rules and regulations.



Brother Joel Damian, FSC, with a testimonial plaque presented to him by the Brothers at their province convocation at St. Mary's University in Winona, Minnesota, in August 1987. The plaque acknowledges the many schools and additions he was responsible for building as well as the many programs he developed at Christian Brothers Services and elsewhere. The design and calligraphy of the plaque has a Lasallian connection as well. It is the work of Stanley Kancewick who graduated from De La Salle Institute in Chicago in 1932.

Diane Engstrom

*CBS Risk Management Services
Managing Director (Retired)*

One day, early in my tenure at CBS, I had a lengthy call with a Sister from a religious order trying to explain why they should have insurance on their building. Sister thought the money spent on insurance would be better used in their ministry.

Brother Damian happened to be near my desk and asked about my call. I explained my conversation with Sister and said, ‘Some people just think that God will provide!’ Brother responded, ‘He did. He provided you!’

It was my “ah-ha” moment. I understood how I fit into the mission of CBS.

A Glance Back

1960

CBS was founded as Brother Joel Damian, FSC organizes a mutual cooperative purchasing group, National Office Service Company, Inc.

Brother Joel Damian, FSC (1918-1991): Brother Joel Damian, the founder of Christian Brothers Services, served as its president from 1960-1985. Damian was a pioneer of his time and was instrumental in creating CBS and lauded for his work throughout his lifetime; his accomplishments were numerous along his path as a Christian Brother. In addition to founding CBS, Brother Damian was instrumental in founding Christian Brothers Investment Services. As the Auxiliary Visitor of the Midwest District of the Christian Brothers from 1954-1967, Brother Damian supervised the planning and construction of Catholic high schools throughout the Midwest, 51 buildings or major additions in all.





Teri Hambrick
Hired 8/1984



Tammy Neff
Hired 3/1987



Buffy Blanton
Hired 4/1992



Mary Sebb
Hired 2/1986



A Glance Back

1960

National Office Service Company, Inc. was located at St. Patrick's school from 1960-1967

1964

Christian Brothers Employee Retirement Plan was created

The Christian Brothers Employee Retirement Plan was created, providing a traditional form of retirement benefit, also known as a defined benefit plan. Brother Damian continued to develop ways to protect the financial resources of religious organizations and allow educational institutions to provide benefits for the new cadre of lay teachers staffing the schools.

1967

National Office Service Company, Inc. opened on the Lewis University campus

Brother Damian helped establish the Christian Brothers National Office on the campus of Lewis University in Romeoville, Illinois, and built the novitiate and scholasticate on the campus.

What was it like working at the Lewis University office?

Terry Hambrick

Director of Benefits Administration and Membership

When the CBS building was located on the grounds of Lewis University, the desks were all made from hollow doors as the desktop; held up by two metal filing cabinets. There was only one work shift 8-4 (yes, we were paid to take lunch). Lunch was provided free of charge and all homemade by two wonderful sisters who worked the kitchen. Christmas gifts consisted of a monetary gift, steaks and a case of wine!

Buffy Blanton

Managing Director of Human Resources

Our offices at Lewis University were not constructed like the offices we work in today. Each division had an open-style room with desks and no cubicle walls. We had custom-built shelves on our desks that were covered with shag carpet and lovely footstools that were built to match. In the absence of today's technology and HIPAA, paper was everywhere on desks, in file cabinets and on shelves. There were also multiple typewriters in each division to type up checks and some office correspondence.

At the old building, one perk we all loved was a free lunch and breakfast every day! If you didn't care for the hot food being served, there was also a salad bar. In 1992, I was employee number 140 compared to today where we have grown to over 260 employees.

Tammy Neff

Senior Account Representative

We were a tight-knit group and the Christmas parties were a blast with red and white altar wines on each table. The desks were made of two-drawer file cabinets with a 36-inch door with finished edges on top. We had outgrown the space to store files or even have room to hire extra help. We went from 50 employees to like 150 employees very quickly and it went from knowing everyone to a new face every day.

Mary Sebby

Retirement Project Administrator

So many wonderful memories over the years, from soups and sandwiches prepared by Jenny and Florence in our kitchen to daily chats with the Brothers who were residents in our building. Brother Damian was ever-present with his smile and quick wit, Brother William Walz would join us for breaks in the courtyard; Brother Fred Dillenberg was in charge of the stock room that housed the altar wines; and Brother Hillary Gilmartin would introduce us to a new word each day from Webster's Collegiate Dictionary. Who could ever forget the first PC which would eventually replace our desktop terminal and electric typewriters? We were on top of the world as we took part in the dedication ceremony of our new building and the open house that followed.



The Religious Comprehensive Trust

Father Fran Dyer, O.P.

Former Religious Institutes Consultant

Looking back, no one could have known how large the Religious Comprehensive Trust would become or how many people it would help. Father Fran Dyer, O.P., religious institutes consultant and former managing director of the Christian Brothers Health Management Services Religious division, was a charter member of the Religious Comprehensive Trust and remembers its humble beginnings. “I can remember, as a seminarian, going down to the recreation room and filling out the card to sign up. The premiums were \$8.95 a month.”

As the Trust grew with more provinces and Orders joining, the trustees decided it would be more economical to self-administer the program. In 1977, the insurance company contract was not renewed, which allowed member contributions to be collected and expenses reimbursed directly from the Christian Brothers Services office.

Throughout the years, the Trust had leadership changes. In the early years, Brother Augustine Kossuth, FSC, followed by Brother Mark Emken, O.S.A., succeeded Brother Damian as managing directors.

Brother Tom Hetland, FSC

Religious Institutes Relationship Manager

Brother Thomas Hetland, FSC, who serves as the religious institutes relationship manager, sees the good work the Religious Medical Trust (RMT), a combination of the former Comprehensive and Deductible Trusts, provides firsthand by visiting religious institutions and talking with members. “In my many visits with our RMT groups, I hear one response over and over.”

“They are grateful for the foresight of Brother Joel Damian who established the religious Trusts over 50 years ago along with the many other programs available through Christian Brothers Services. Our members are also overwhelmingly complimentary about the courteous, personalized and prompt service they receive from everyone at CBS whenever they have reason to get in touch with an issue or concern. The RMT and all the other programs at CBS were not established as a business to make a profit but rather as a ministry to serve those who serve others in Catholic organizations throughout the United States. Brother Damian’s vision lives on!”

The Nine Founding Participants in the Religious Comprehensive Trust:

Alexian Brothers
Chicago, Illinois

Christian Brothers of the Midwest
Chicago, Illinois

Friar Servants of Mary (Servites)
Chicago, Illinois

Augustinian Fathers and Brothers
Chicago, Illinois

Cistercian Fathers and Brothers
Dallas, Texas

Holy Cross Franciscan Fathers
Lemont, Illinois

Carmelite Fathers and Brothers
Chicago, Illinois

Dominican Fathers and Brothers
Chicago, Illinois

Society of the Precious Blood
Liberty, Missouri

1967

The Religious Comprehensive Trust is formed

In 1966, Christian Brothers Services (CBS) founder Brother Joel Damian, FSC, met with provincials from nine Chicago area religious institutes.

There was a growing concern that insurance coverage for the institutes’ religious members was chaotic. Some religious members depended on the diocese for their insurance, some had group programs for their individual houses and some members didn’t have coverage at all. At times, all three circumstances existed in the same institute! At that meeting, Brother Damian asked the provincials if they would be interested in obtaining coverage for their religious members.

The nine provincials purchased a single contract from an insurance company in 1967 for the religious members of their institutes. At that time, Brother Damian established the Religious Comprehensive Trust (now the Christian Brothers Religious Medical Trust), serving as its first director. All institute members, except those with coverage provided by their ministries, had to be enrolled in the Trust.



“Working for an organization with a deep, rich history of serving others means everything. Knowing that the programs and services we offer allows our members to continue their mission provides me with a great deal of satisfaction.”



John Airola
Hired 9/1990



The Employee Benefit Trust

John Airola - CBS Health Benefit Services Managing Director

The Early Days

During the plan's early days in the late 1970s through the mid-1980s, the sound of workers clickity-clacking on IBM Selectric typewriters—the new technology of the day—could be heard throughout the company's office which at the time was housed on the campus of Lewis University in Romeoville, Illinois. It was the sound of employees manually processing eligibility forms, invoices and adjudicating medical and dental claims. The process was tedious and laborious, but overall the plan administration was fairly routine as the Trust's plan offerings amounted to two choices, an 80 percent reimbursement plan with either a \$100 or \$250 deductible, better known as a traditional indemnity plan.

In addition to the typewriters, the telephones were also getting a workout. In the absence of an integrated phone system, which wasn't available at that time, staff answered phones and promptly returned messages left by providers and members. Great customer care has always been and continues to be one of, if not the most, important service provided.

Today

The HBS customer care team is comprised of 21 qualified professionals providing top-level service and the attention to detail our members and participants have come to expect and deserve. The customer call center receives an average of 825 calls per day which translates to 4,125 calls per week, or 16,500 calls per month. In 2014, the customer care team was recognized by BenchmarkPortal as one of the top 100 call centers in North America and has been annually recognized every year since then.

The days of using answering machines to collect messages and return calls have been replaced by new online features such as our mobile website, and an interactive iChat system that enables members to access membership services even more quickly. The Trust also provides programs that allow people to stay in their homes and access care; Teladoc (telemedicine) and Livongo (diabetes and hypertension management) are prime examples.

Technology is enabling the Trust to conduct its business much more efficiently and innovatively, allowing the company to become more data-driven by collecting statistics, metrics and producing reports on things that didn't exist several years ago.



1970

The Brothers Retirement Plan is established

This program allows Catholic Church employers to provide a guaranteed retirement income to Brothers.

1976

Unemployment Reimbursement Program started

This program is designed to offset the costs incurred by Catholic organizations when an employee becomes eligible for unemployment compensation benefits. This program is open to all not-for-profit Catholic organizations listed in the Official Catholic Directory.

1977

Employee Benefit Trust (EBT) is formed

Though Christian Brothers Employee Benefit Trust (CBEBT) was officially established on January 1, 1977, the CBEBT really had its genesis in 1964 with the vision of Christian Brothers Services (CBS) founder Brother Joel Damian, FSC. At that time, Brother Damian gathered the leaders of four Chicago area Christian Brothers high schools to develop a pension plan for their lay teachers. Upon launching the pension plan, he realized that the schools could also benefit by combining resources to purchase health insurance. After a few years of purchasing coverage through a commercial insurance company, Brother Damian had the vision to self-insure the benefits being provided and established the CBEBT as a means to provide a comprehensive package of employee benefits to the lay employees of Catholic Church institutions.

Larry Baker

Managing Director of
Risk Management Services

“Everyone brings a special skill, talent, perspective and benefit to the overall operations of Risk Management Services. I could not be more grateful to this group of people and their past efforts, with the prospect of even greater success as a goal and reality for the future.”



The Risk Pooling Trust

Diane Engstrom - CBS Risk Management Services Managing Director (Retired)

With the whir of countless box fans and the click-clack-ding of typewriters in the air, the risk team could be heard pounding out documents, always in triplicate and always looking for a place to file them. It was the 1960s; breakfast and lunch were free as was the whiff of cigarette smoke and the shag carpet on the cubicle walls. Aesthetics weren't the heart of CBS, but the work was.

"The best part of the job was working with the Brothers and talking with the religious administrators of our member organizations," recalls Diane Engstrom, whose tenure with the company dates back 37 years.

Preceding the Risk Pooling Trust, the Christian Brother's property and casualty risk pooling program, comprised a number of traditional insurance policies with high deductibles. In the late 1960s and early 1970s the Christian Brothers arranged for changes in the program to include other Catholic not-for-profit 501c3 entities. Eliminating the need for every entity to have its own "insurance" expert, and most importantly reaping nearly a 49% loss ratio, the risk pooling arrangement became beneficial to everyone involved.

Pooling resources was a new concept and the Risk Pooling Trust worked when it was established in 1979, as it does today, to help insulate members from spikes in premiums that can occur in the insurance market, thereby promoting rate stability.

Along the way, technology has been the catalyst for many of the enhancements made to the services CBS provides. A far cry from the 1,100 square-foot file room that was crammed with those triplicate insurance

forms, automated systems, placing document issuance at your fingertips, revolutionized the way business was done. With the introduction of an administrator's section of the website, members were able to submit property and vehicle changes, request certificates of insurance and report claims online. Today, nearly 90 percent of members are enrolled on the website and submit transactions online.

Forty years ago, the Trust began with nearly 100 Catholic organizations, insuring \$350 million in property values and 958 vehicles. It has since grown to include nearly 1,500 Catholic organizations, insuring 15,933 buildings with property values of \$29.3 billion and nearly 23,000 vehicles.

The success of the Risk Pooling Trust is evidenced not only through its consistent and sustained growth in membership, but also in that its members have remained loyal to the Trust throughout its 40-year history. Their commitment is evidenced each year with nearly a 100 percent renewal retention rate.



Diane Engstrom
Hired 5/1983

1977

The Religious Community Deductible Trust is established

The Religious Community Deductible Trust is similar to the Comprehensive Trust, but does not include dental. It is a stop-loss program designed to protect against catastrophic and untimely medical bills. This program is ideal for an Institute that is geographically limited such as a monastery, or one which is centralized administratively.

1979

The Christian Brothers Risk Pooling Trust is formed

This cooperative "Church Plan" of committed Catholic Church organizations offers a broad package of property/casualty coverages and optional limits designed to protect each member against financial loss from their religious and charitable activities.

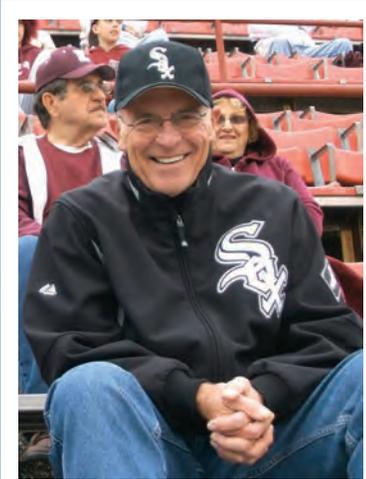
1981

Christian Brothers Investment Services, Inc. (CBIS) is founded

Unifying faith and finance, CBIS was founded by the De La Salle Christian Brothers to provide trusted socially responsible investment management services exclusively to Catholic organizations. CBIS operates as a for-profit corporation.

**Brother William L. Walz
Scholarship is established
in 2010.**

The scholarship honors Brother William L. Walz, FSC (1941-2010) for his years of service and dedication to the Christian Brothers and Christian Brothers Services. The scholarship will be awarded each year to a senior Lewis University, College of Business or Computer Science major who has demonstrated leadership activities during their college career.



Br. William Walz, FSC
Lifelong Chicago White Sox fan

Employees Remember Brother William Walz, FSC

President /CEO of Christian Brothers Services from 1985 to 2008

“While I don’t have any specific memories of Brother William, the one thing that always springs to mind is how he always had a big, genuine smile on his face. It was impossible not to be uplifted when faced with his jovial nature!”

“You could tell Brother William genuinely cared about the employees of CBS. You could feel it in his speeches and see it in his actions. I once put an entry in the suggestion box to have flavored creamer offered in the kitchen. By the next week, it was there! Brother William personally stopped by my desk to ask if I saw it and had a big smile on his face. He prided himself in the service of others and thought of his CBS employees as family.”

“Brother William was an imposing figure. In fact, when I started at Lewis University as a freshman, he was the Bursar in the Business Office. I met with him for my student tuition installment payment agreement. He was working on his MBA while working at Lewis. Who knew he’d go to CBS and that I would, too! Small world. I still have that signed form!”

“Brother William was always friendly and considerate. We knew every morning when he came into the office. (At that time, the office was on the Lewis University Campus.) He would be smoking a pipe and his pipe tobacco always smelled nice! At our Christmas parties, he would greet everyone at the door, shaking hands with the employee guests and giving the female employees a kiss on the cheek.”

“Brother William was president of CBS for 22 years. His mantra for the services offered by CBS was ‘Acquire with Product, Retain with Service, Create Apostles with Results.’

The continued growth of CBS can be attributed to our reputation, the excellent service we provide, and our cost-effectiveness. This formula has encouraged our current members to become apostles for prospective clients. If an organization has superior products and excellent services, it is only natural apostles will be created. We will continue to follow Brother William’s message and may he live in our hearts forever.”

*“Acquire with Product, Retain with Service,
Create Apostles with Results.”*

1985

Brother William Walz, FSC becomes President/CEO of Christian Brothers Services, Inc.

Brother William L. Walz, FSC (1941-2010): Brother William Walz, FSC, succeeded Brother Damian as President of CBS and served as President/CEO of Christian Brothers Services from 1985 to 2008. Brother Walz took Brother Damian’s model and expanded it greatly. He was blessed with the products and programs developed by Brother Damian; however, he also expanded the programs to levels beyond those envisioned by Brother Damian. Brother Walz’s motto was, “*Acquire with Product, Retain with Service, Create Apostles with Results.*” Because of his vision, we now have the apostles in our programs he knew were necessary.

1986

The Student Accident Plan becomes part of the Risk Pooling Trust

The Christian Brothers Student Accident Plan is designed to reimburse parents and guardians for out-of-pocket medical expenses which occur as the result of an accident at school or a school-sponsored event. The Plan is secondary to any primary group or individual health insurance policy.



Moving to the Romeoville Office

When I joined Christian Brothers Services in May 1987, CBS was growing very quickly. Even then, it was apparent that we were going to outgrow our building on the campus of Lewis University in Romeoville. To plan for a move, CBS undertook a space planning project to review staffing and physical space requirements. After comparing all options, we made the decision to buy land and construct a building on other side of Romeoville, selling our existing building to Lewis.

Construction took about a year and a half, and move-in was scheduled for Columbus Day weekend, 1992. Moving was a huge undertaking and involved relocating our main computer system and installing a new phone system, fax machines and laser printers. We outfitted the new building with modular furniture for employee desks and walls.

As a paper-intensive operation in those days, a large part of the move involved bringing all of the documents with us with a plan to stop making new paper where possible. We created a system to microfilm all medical claims after we processed them and then shredded the paper. All older files that made the move were meticulously boxed and filed with destroy dates on them. Each year, we would destroy the oldest year of records and all newer records would be stored electronically. It worked.

The move went according to plan. The new furniture and phone systems were installed and everyone's boxes made it to their desks and departments. Compared to the old building, the new one was cavernous with more workspace, large aisles and empty floor space to grow into.

I recall going back to the old building after the move to ensure nothing got left behind and being struck by the emptiness. The fans had stopped spinning; the old phone system remained, but no more calls; the conference room was empty; the kitchen and lunch room were quiet. We brought everything that had value to us or might be useful. The old homemade desks and furniture walls remained. Indentations in the carpet were clearly visible where large objects once were. I remember seeing all the extension cords, and how they all seemed to be plugged into each other forming one long chain. Looking back, I have nothing but fond memories of the old building. It was an incredible place with everyone working toward the same mission we work toward today.

We had an open house at the new building and the laying of the cornerstone in spring 1993 with a time capsule safely stored within it for a future generation to find. We had many new memories to make. Those of us that know the old building still call the current one the "new building." No one then could have imagined the heights to which CBS has grown and all we do today.

Tom Drez
Chief Information Officer

Everything was all shiny and new! A nonsmoking atmosphere (they actually smoked right at their desks in the old building). We went from the old Christian Brothers (brown in color) to the new Christian Brothers (blue) carpet and desk walls. Everything seemed bright and colorful; we had windows and sun light!

Tammy Neff
Senior Account Representative

1987

National Office Service Company, Inc., becomes Christian Brothers Services, Inc.

1991

Br. Joel Damian dies October 10, 1991

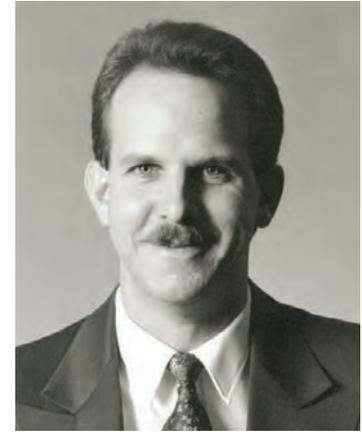
Brother Damian helped establish the Christian Brothers National Office on the campus of Lewis University in Romeoville, Illinois, and built the novitiate and scholasticate on the campus. He was named executive secretary of Christian Brothers Conference and established employee benefit programs for the lay associates/colleagues of the Christian Brothers. He also helped initiate and establish Trusts to cover property and casualty programs, religious health Trusts and all the programs/plans currently administered by Christian Brothers Services.

1993

Christian Brothers Services moves from Lewis University to its current headquarters in Romeoville, Illinois

As a result of changes in the tax code, Christian Brothers Services, Inc. (for-profit) is renamed Christian Brothers Services (non-profit). Each Trust is controlled by its own Trustees elected by participants of the Trust. A new for-profit corporation, CB Programs, Inc. was organized to administer all the other programs.

“I have been blessed to be part of Christian Brothers Services for nearly 40 years. We are a unique Lasallian ministry, which acts as a steward to those serving the Church. My hope is that the Plans and Programs that I have been a small part of over the years has allowed participants the financial security to enjoy their retirement.”



Jim Ceplecha
Hired 3/1982

Retirement Savings Plans

Jim Ceplecha - CBS Retirement Planning Services Managing Director

When I started, the CBERP had 3,000 active employees and 400 retirees. The market value of assets was \$21 million. As of the last plan year, the plan had over 17,000 actives and 13,000 retirees. The market value of assets was \$1.4 billion. We were able to make significant changes in the plan over the years to provide more security, without losing a significant number of clients. Those clients that elected to leave the defined benefit plan overwhelmingly chose to join the Christian Brothers 403(b) plan.

The CBERP has provided a secure source of monthly retirement income to tens of thousands of participants over the years. We have provided flexibility in employer funding to make sure employers could continue to provide this benefit to their employees.

In 1993 Brother William asked me to start a 403(b) retirement savings plan. I had no idea how to begin.

I contacted some of my colleagues with the Church Benefit Association for guidance. I met with Vanguard to establish the plan. They asked me how many participants and how much money we had.

I said none. They told me they couldn't provide record-keeping services but would provide the investments. We hired a record keeper. The first few years were somewhat sparse. It wasn't until 1997 that we had over 1,000 participants and assets of \$3 million. Vanguard is now our record keeper and we are actually considered a jumbo plan by Vanguard based on the number of participants. We now have roughly 16,000 participants with assets over \$500 million. Brother Michael directed me to develop an open architecture plan in addition to our current 403(b) multiple employer plan, which is a turnkey approach. We were able to get the Federation of Social Service organizations for Brooklyn and Queens, New York, to establish such a plan.

The all-in fee which is the total cost for running the plan has continued to decrease over the years. We recently hired an independent firm to benchmark our fee to the defined contribution industry. Their analysis shows the weighted average cost for the CB 403b plan to be in the 10 percentile ranking. In addition, the report states that the CB 403(b) provides more services than most providers. This allows the majority of our employers to pay the administrative fee, rather than burdening their employees with this fee. This provides the employee with an overall better investment return.



1994

Prescription Drug Program is established

Prescription drug coverage is available with all medical plan designs. The integrated plan offers prescription service at both retail and mail-order pharmacies. The program includes over 99% of all retail pharmacies across the United States. Our long-term home delivery program can offer significant savings to participants with the ease of no hassle refills.

1995

The Christian Brothers Retirement Savings (CBRSP) 403(b) Plan is introduced

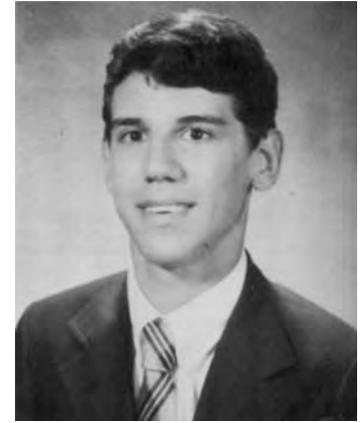
The CBRSP is a 403(b) Retirement Plan which allows a participant to save for retirement on a tax-deferred basis. The employer can also contribute to the plan through a matching and/or discretionary contribution. Most contributions are immediately 100% vested in the plan. Some vesting schedule options for employer contributions recently have been added.

1998

The Christian Brothers Employee Retirement Savings (CBERSP) 401(k) Plan is introduced

The CBERSP is a 401(k) Retirement Plan which allows a participant to save for retirement on a tax-deferred basis. The employer can also contribute to the plan through a matching and/or discretionary contribution.

“CBS is a product made with care by all of its employees, past and present. I’m proud and lucky to have worked for such a mission-minded organization for more than three decades where doing the best and right thing has always been encouraged. I am grateful to have had some small part in the history of CBS and its use of information technologies.”



Tom Drez
Hired 5/1987

IT & Website Services is Established

Tom Drez - CBS Chief Information Officer

CBS created its first website in Fall 1997. Shortly thereafter, Catholic organizations noticed our new website and asked if we could help them build a website too.

CBS has “services” in our name, and the word “no” is not in our vocabulary.

So, we began providing website services to Catholic organizations upon request, with no formal business plan. Over time, Website Services evolved to offer a full range of Information Technology & Website Services in its portfolio. This includes IT operations, consulting and support in addition to website design, development, hosting, maintenance, monitoring and management.

CBS has a mission to assist Catholic organizations with their needs and strives to create and offer needed products and services at an affordable cost. Because of this, CBS is viewed as a trusted advisor to Catholic organizations. All organizations can benefit by applying information technologies to improve operational efficiency and effectiveness while improving service delivery. CBS strives to be as helpful as possible to all Catholic organizations.

IT & Website Services has been part of CBS’ offerings since 2000 and continues to evolve and improve its portfolio of products and services to best assist Catholic organizations. CBS has also added third party IT providers to the CBS Vendor Referral Program to help meet the needs of CBS members, and to offer a complete range of IT products and services.

CBS will continue to listen to its members and evolve IT products and services to meet their needs at an affordable cost.



1997

Christian Brothers Services launches its first website

Recent college grad, Jason Langs, develops the company’s first website. The project was sponsored by Tom Drez and overseen by Cheri Rafter. The content mostly mirrored what was in our paper brochures, and it roughly took two months from concept to finish. At that time, while many large companies had websites, it wasn’t as common for mid to small size companies to have them. Once other organizations saw CBS had a website, providing website services for others was born.

1998

IT & Website Services is established

As a full service provider, Website Services has the ability to tailor services for organizations with as much or as little as they need so they can focus on their mission. Full service includes design, development, maintenance, monitoring and management of their website.

2007

Brother William Walz retires on December 31, 2007

During the 22 years Brother William served as president/CEO, the organization grew from approximately 60 staff members to over 200. CB Programs, CBS Canada and CB Travel were all added to the expanding list of services offered by Christian Brothers Services. He was particularly proud of the management team he put together and the design and construction of the current building in Romeoville.



Brother Michael Quirk, FSC

CBS President and CEO

“I began my professional career at Christian Brothers National Office, precursor to Christian Brothers Services, in 1979. During those three years I was privileged to have worked beside the company founder, Brother Joel Damian. After a 26-year hiatus, I was once again fortunate to return to Christian Brothers Services, this time as its President/CEO. I am so very blessed to be part of this incredible and important Lasallian ministry and to have the opportunity to work alongside so many dedicated professionals.

People who always strive to serve the various ministries; who participate and utilize the wide variety of our services.”

A Respected Leader and Mentor

“I came to Christian Brothers Services in 2003 from Lewis University where I was Associate Vice President for Human Resources. The University is in the CB health, retirement, and risk plans so I wasn’t completely new to CBS and had worked with President Brother William Walz, Jim Ceplecha and John Airola for years.

One of the first things I learned about CBS was of its commitment to its ‘members’ (‘customers’ to the outside world). I learned this, not from Brother William or from other senior managers. I learned it from listening to staff talk about their jobs. Many had/have long-term relationships with reps from member organizations. A survey I conducted a couple of years later revealed that these relationships and providing excellent customer care were the greatest source of job satisfaction for a large majority of employees. What more could the head of HR want? Many, many organizations have to train their employees to serve customers well. Not us. Our plans are exceptional and our employees know it. Our member organizations are Catholic ministries and Religious Institutes, both large and small. Our employees have great respect for these ministries and it shows.

By the time Brother Michael Quirk became President, CBS was ready to learn about the Lasallian charisma of the Christian Brothers. What our employees learned, and what Brother Michael and I already knew, is they were already doing Lasallian work— they just did not know it. Our employees soon identified five core values that found their way into our culture, staff development, performance management and job descriptions. The #1 core value? “We are Lasallian.” When Brother Michael reflected back to employees that CBS is a Lasallian ministry; it was transformative. Employees wanted to learn more about St. John Baptist de La Salle and about other Lasallian ministries in the CB Midwest District. They identified ways to continue the Lasallian spirit momentum and they have done so to this day.

I am so proud to have been the Chief Human Resources Officer for CBS for 15 years. I think CBS was a hidden jewel for many years— a well-kept secret of the Christian Brothers. Brother Michael has changed that. He knows we have world-class business plans and solutions for the Catholic community and that we have world-class employees who will continue our Lasallian ministry far into the future.”

Pamela Mott
Retired Chief Human Resources Officer

“A funny memory I have of Brother Michael was during my interview with him. One of the questions he asked was, are you a White Sox or a Cubs Fan? Lucky for me, I answered White Sox. Eight years later, he has been one of the best bosses I’ve had. His trust, support, empathy and leadership has truly allowed for me to grow in my position and work for a great organization.”

Adelina Sklodowski
Executive Assistant

“As a student, I was fortunate to learn in an environment Brother Michael made possible during his 20-year tenure as President of De La Salle Institute in Chicago.

As an employee, I get an opportunity to thrive in a successful and culture-rich environment he has fostered.

As a person, I consider myself blessed to benefit from his leadership, his mentorship and most importantly, his friendship.”

Bob Fiorentino
Business Development Specialist



Br. Michael Quirk, FSC
Hired 1/2008

2008

Brother Michael Quirk becomes President/CEO of Christian Brothers Services

Brother Michael Quirk, FSC, Ed.D.: Prior to joining CBS, he was the President of De La Salle Institute, a co-institutional secondary school in Chicago for 20 years. He has also taught at both the high school and university levels.

Brother Michael holds BA and MBA degrees from Lewis University and a doctorate from De Paul University. He has served on various Lasallian and civic boards including: Montini High School, San Miguel Chicago, St. Mary’s Press, Extollo Educational Foundation, the Chicago Board of Ethics, the Catholic United Investment Trust (CUIT) and the Church Benefits Association. He presently serves on the following boards: Christian Brothers University, Lewis University, the Church Alliance and the International Finance Council.

Terry Arya

CBS Chief Marketing and
Business Development Officer

“Members and clients are in the best hands at Christian Brothers Services. It’s an honor to be a part of an experienced, dedicated and talented team who exude passion about the mission. CBS has expertly evolved to meet the changing needs of the marketplace over the past 60 years. The company will continue leading the way with excellent products, plans and services supported by world class customer care.
Happy anniversary CBS!”



Marketing and Communications Department is Established

In 2010, Christian Brothers Services established its Marketing and Communications Department. Tasked with providing CBS member organizations and participants with relevant information about their benefits, “MarCom” as it was known, also set out to share timely news from each CBS division, and create marketing campaigns and pieces designed to enhance the membership experience.

In the early days, one of the department’s first endeavors was producing a company magazine. In the spring of 2010, Marketing and Communications first published the Christian Brothers Services’ *OutReach* magazine. *OutReach*, which features content written by subject matter experts from both inside and outside CBS, has provided our members with pertinent, thought-provoking content on topics ranging from health care and retirement services, to risk management and information technology services. Our members in Catholic schools have learned innovative methods better to serve their constituencies and their employees.

Through its 10 years of publication, *OutReach* has been recognized for its informative and educational articles. The magazine has garnered eight MarCom Awards, eight Communicator Awards, and three Hermes Creative Awards. Each of these awards are international, creative competitions that recognize outstanding achievement by marketing and communications professionals.

But marketing at CBS is more than *OutReach*. The department, now known as the Christian Brothers Services Marketing and Business Development (MBD) Department, has come a long way from its 2010 beginnings. MBD sets the branding standards for the company, incorporating a consistent look and feel across all of our publications and mailings, as well as the look of the cbservices.org website. Every three years, MBD embarks on a complete across-the-board rebranding to assure the CBS brand is always fresh and updated.

MBD also produces a variety of newsletters, providing our member organizations with valuable information on topics from each CBS division. These newsletters have also won numerous awards through the years. Additionally, MBD provides content for the CBS Blog. The blog features news of interest for our members and articles from each of our divisions from the CBS *Constellation* newsletter. To further stay connected with our members and give them the most current information possible, MBD operates the CBS accounts on social media, including Facebook, Twitter and LinkedIn.

MBD is proud of its ability to connect industry leaders to its members through our Spring and Fall Webinar Series. MBD produces webinars for each of the CBS divisions on a wide range of topics of interest. Each webinar is free to members and available live and through the on demand webinar library at cbservices.org.

On the Business Development side, our presence at industry events continues to grow. Through sponsorship, exhibition and presentations, we highlight the CBS brand to approximately 3,500 event attendees across 14 events in 2019.

These industry events, along with surveys, webinars and marketing campaigns, provide an opportunity for members and prospects to develop a relationship with CBS. Since launching Salesforce as our new prospecting system in 2019, we have grown our ability to measure that relationship and the customer’s journey. This improved tracking, reporting and prospecting mechanism is a significant milestone in our 60-year history.

As technology and the ways we communicate with each other continue to evolve, MBD will continue to adapt to give our member organizations the best possible service.

2009

Christian Brothers Services introduces its new branding. The company logo and website are completely redesigned.



**CHRISTIAN
BROTHERS
SERVICES**

CBS launches annual company-wide webinar series

2010

Marketing and Communications Department is established

First issue of *OutReach* magazine is published

The Christian Brothers Services publication, *OutReach*, has seen much growth over the years. It started out as a small companywide newsletter to the CBS members. In 2010, the newsletter was converted to a full magazine to meet the demands of our members and the growing organization. When Christian Brothers Services first published *OutReach* magazine in the spring of 2010, it was with the goal to deliver useful and interesting information on topics that are relevant and important to our members as leaders in today’s Catholic organizations.



Mary J. Foley

Managing Director Catholic School Management
and Mission Advancement

Mary joined CBS in August of 2017 with over 35+ years of experience to the not-for-profit. She oversees Catholic School Management and successfully launched the subsidiary division of Mission Advancement to expand resources and opportunities for all our members in the areas of fundraising, organizational development, communications and stewardship.

Catholic School Management

Given the primary ministry of the Christian Brothers, and the many educational institutions who are members of CBS Trusts, the acquisition of Catholic School Management (CSM) was a perfect match.

In 2012, CEO Richard Burke was preparing a succession plan for his impending retirement that would successfully carry on CSM's consultative guidance to Catholic schools. After a chance meeting with Lucille McKenna, the wife of Christian Brothers Services (CBS) COO, Richard McKenna, and subsequent conversations and negotiations, CBS officially acquired CSM in October 2014.

This allowed CSM to offer services such as employee benefits, property/casualty insurance, retirement planning, and IT consulting to the many schools it serviced. It also provided the schools that were currently in the Trusts of CBS access to the expertise of CSM staff and adjunct consultants.

In August 2017, upon the retirement of Burke, CBS hired Mary J. Foley, a long-time consultant to Catholic organizations, to become the managing director of CSM and to launch Mission Advancement, a new enterprise for CBS.

Catholic School Management provides comprehensive consulting services in all areas to ensure Catholic schools improve and flourish in these challenging times. This guidance and direction has been shared with 3000+ schools ranging in size from 100 to 2,000+ students and systems of schools within dioceses and religious congregations. CSM consultants have extensive depth and breadth of experience in specialized areas of Catholic school operation.

Mission Advancement

Since the inception of CBS, the staff and leadership have continually sought ideal solutions to meet the needs of its members and clients. In addition to our flagship services – health, retirement and risk – more resources and opportunities have been provided via IT Consulting, Catholic School Management, BMT Financial Services and, most recently, Mission Advancement.

Today more than ever, institutional advancement is key to the success of every organization. Mission Advancement assists churches, parishes, dioceses, religious congregations and sponsored ministries in the areas of fundraising, communications, organizational development and stewardship.

This array of services, coupled with creative techniques and applications, enables the mission and ministry of the members and clients to flourish.

The formation of Mission Advancement is just another example of how CBS continues the goal of growing the business to support the ever-changing needs of our members and the Catholic community.

“Who is a Christian Steward?”

One who receives God's gifts gratefully, cherishes and tends to them in a responsible and accountable manner, shares them in justice and love with others, and returns them with increase to the Lord.”

This definition from *Stewardship – A Disciple's Response* is the inspiration for the work conducted by CSM and Mission Advancement on behalf of our clients and the members of the CBS Trusts.

2011

CBS begins hosting Trustee Summits (2011, 2013, 2015, 2018)

CBS launches social media channels

2012

CBS creates a new Health Benefits Services division

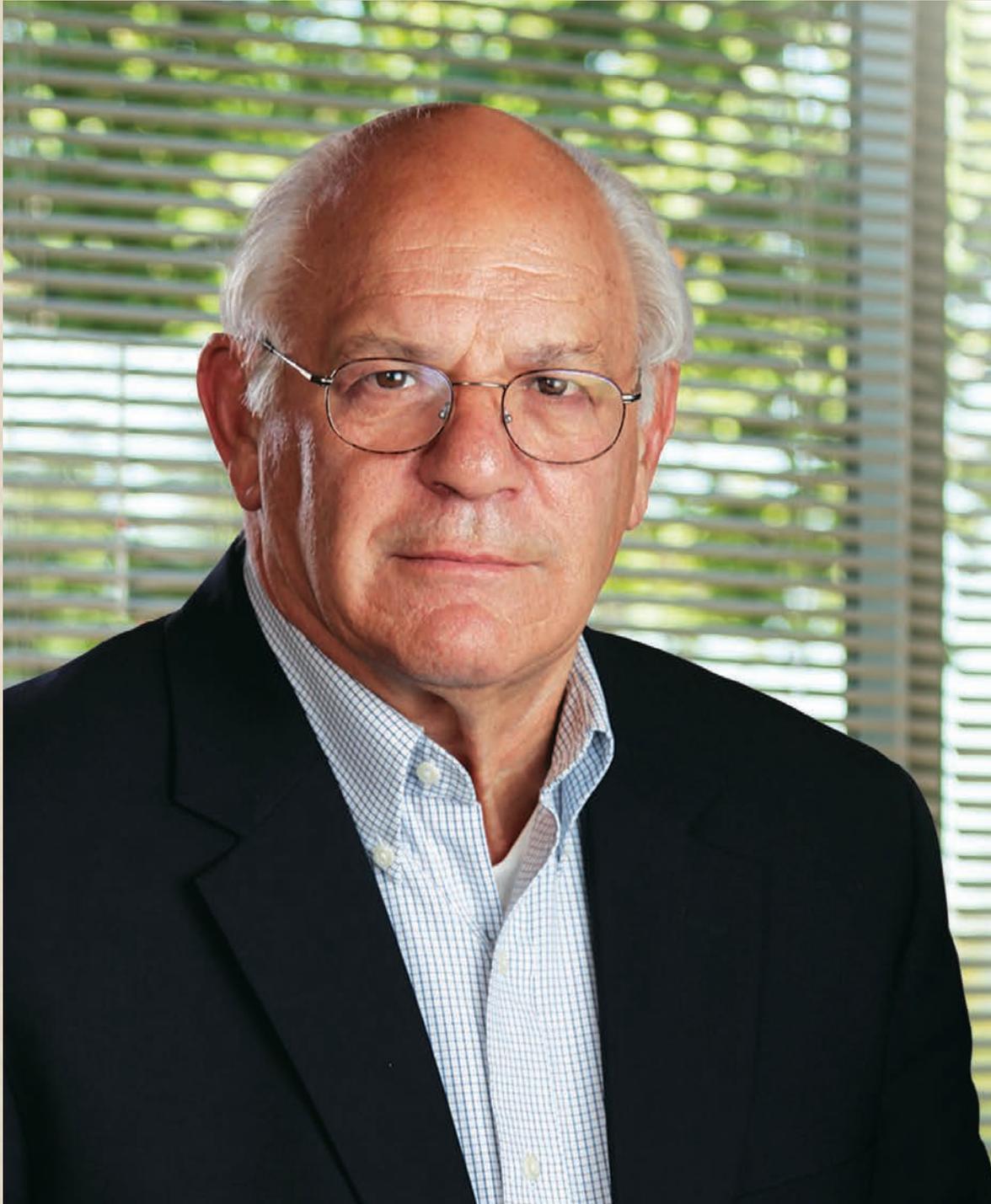
2013

Information Technology & Website Services (ITWS) is established to provide IT Operations and Website design and hosting services to our members. ITWS has also partnered with four outside providers that can offer our members a variety of networking solutions.

2014

CBS acquires Catholic School Management

Catholic School Management (CSM) was founded in 1973 by partners Richard J. Burke and Rev. Frank Bredeweg, CSB. Originally known as NCEA Financial Consulting Services, the firm focused exclusively on finance and development consulting services for Catholic school and diocesan administrators.



John Tortolani

BMT Managing Director

“The BMT team has always recognized that our two organizations have compatible and harmonious respective missions. As a leader at BMT, I am thrilled that our ability to provide top-notch, professional and customized services will be enhanced by this relationship as we maximize our capabilities and infrastructure.

In joining Christian Brothers Services, BMT is now positioned for even more success.

I am enthusiastic about the future for BMT and its clients.”

Christian Brothers Services Acquires BMT

Brenner, McDonagh & Tortolani, Inc. (BMT) was founded in 1972 with the mission of serving religious institutes and sponsored ministries with their management of daily operations including accounting, financial management, benefits eligibility management, human resources, real estate planning and investment consulting. BMT currently serves over 270 religious organizations.

Christian Brothers Services (CBS) acquired BMT and its offices in Tarrytown, New York, Terre Haute, Indiana and Smithfield, Rhode Island in August 2017.

The acquisition enabled CBS to become a premier provider of consulting services to faith-based organizations. BMT functions as an independent division of CBS, allowing two mission-based organizations to remain focused on their individual vision of serving religious organizations on an even broader level. It was important to the directors of BMT that through the expansion of the relationship and capabilities with CBS that the integrity of the BMT brand stay relevant.

“The BMT team has always recognized that our two organizations have compatible and harmonious respective missions. In joining Christian Brothers Services, BMT is now positioned for even more success. I am enthusiastic about the future for BMT and its clients,” explained John Tortolani, founding partner at BMT.

“BMT’s sound and professional services match our ministry perfectly. You can count on Christian Brothers Services and BMT to continue meeting the needs of faith-based organizations. Together, we will continue to meet the business needs of Church organizations through creative thinking, embracing change and innovation. We take pride in nurturing a strong organizational culture and maintaining an optimistic ‘can do’ attitude. We are grateful for the opportunity to serve thousands of organizations and support their many important missions,” said Brother Michael Quirk, FSC, Ed.D., CEO/President of Christian Brothers Services on the day of the acquisition.

The joining of these two long-standing companies brings more than a combined 100 years of religious marketplace experiences and over 260 dedicated, mission-driven employees serving the Catholic community.



Kelly Murphy - Hired 11/1998

Having joined BMT in 1998, Kelly currently serves as BMT’s Director of Services and is also the firm’s representative for several European clients.

2015

Health Marketplace launched in 2015-2016

2016

CBS dedicates a new Prayer Room to honor Brother James “Santiago” Miller, FSC

CBS dedicated the Prayer Room on Wednesday, February 17, in honor of Brother James, who was of the Christian Brothers Midwest District and was martyred on February 13, 1982, while serving in the Brothers’ Ministry in Guatemala. Brother Michael Fehrenbach, FSC, of the Midwest District and Lewis University, and Brother Paul Joslin, FSC, of Lewis University, who was serving in Guatemala with Brother James joined CBS President and CEO, Brother Michael Quirk, FSC, and CBS employees in the dedication ceremony.

2017

CBS launches Mission Advancement

Christian Brothers Services Acquires BMT

On August 1, Christian Brothers Services (CBS) announced its acquisition of Brenner, McDonagh & Tortolani, Inc. (BMT). BMT serves religious institutes and many sponsored ministries in need of assistance with the management of daily operations, including accounting and financial management, benefits eligibility management, human resources, investment consulting and planning.



Mike Lesiak
Chief Financial and Administrative Officer



Carolyn Randall
Controller

CBS Internal Operations

While CBS divisions, programs, and services are the most tangible external aspects of what we do, looking inside CBS, our support departments also provide important functions critical to the company's operations.

Finance.

The CBS Finance Division provides support for the company's Mission and for member organizations through active stewardship engagement of Christian Brothers Services and all Plans and Programs administered. Over the years, Finance has been dedicated to continuous review and enhancement of systems and processes, as well as staff development, insuring that the care, planning, attention, and management of financial resources maintains strong support. The dedication and camaraderie of each Finance team member supports the continued success of financial stewardship.



Rachel Genz
OS Supervisor

Office Services.

The Christian Brothers Services Office Services (OS) department is a vital part of the day-to-day operation, function and success of CBS. The Office Services team assists with providing the CBS staff with all the office supplies needed to perform

their jobs. OS coordinates all deliveries, both incoming and outgoing for the office. The printing services they provide for the office is essential when it comes to providing for the needs of our members and clients. One of the most critical role of the OS staff is serving as our reception team for office visitors. The internal function of the CBS office would not be as seamless without the dedication of this group.



David Leggero
Manager of Facilities
and OS

Facilities.

Maintaining an office building the size of the Romeoville headquarters of Christian Brothers Services is no easy task, but it is an everyday endeavor for the CBS Facilities team. This small, but dedicated group is charged with keeping the building in top shape—inside and out—for CBS

employees and visitors. From building and motifying work spaces to emptying wastebaskets and keeping the employee lounge sparkling and sanitary, to clearing the walkways of snow and maintaining the grounds throughout the year, you can always find the Facilities team enhancing the beauty and functionality of our work home.



Debbie Zeiger
Senior Admin Assistant

Human Resources.

Critical to the success of the company, the Human Resources Department (HR) of Christian Brothers Services orchestrates a company culture at CBS that allows for its successful retention and development of employees. This is extremely important

as the CBS staff has grown to over 250 people as of 2020. HR works tirelessly to ensure employees are cognizant of their benefits, and maintains policies and procedures while providing consistent payroll practices. Communicating vital company information, the HR department offers organization, leadership and expertise to the entire company.

2018

Religious 50 Year Anniversaries:

Sister Yvonne, 2012

Brother Tom, 2015

Sister Geraldine, 2016

Brother Kenneth, 2016

Christian Brothers Services Celebrates the 100th birthday of Brother Joel Damian

On August 26, CBS employees celebrated the 100th birthday of company founder Brother Joel Damian with a party in Romeoville. To mark the occasion, CBS established an endowment to Lewis University, a gift that will recognize his contributions that will serve well into the future with the "Brother Joel Damian, FSC, Business Plan Competition." The ongoing program helps student entrepreneurs launch new business ideas. The endowment instills the entrepreneurial spirit in future students reminiscent of the visionary thinking of Brother Damian, who orchestrated the concept of pooling resources to help define insurance and financial needs and requirements.

2019

OutReach magazine celebrates 10 years

Through its first decade, CBS published 17 issues and 60,000 copies of *OutReach* magazine. *OutReach* provides CBS members with pertinent, thought-provoking content on topics ranging from healthcare and retirement services, to risk management and information technology services.



A Bright Future

“My short time at Christian Brothers has been a pleasant and rewarding experience. The dedication of all employees to aiding and bettering the lives of those we cover and service is impressive, and the sense of community at work is something to appreciate. It’s always satisfying to know that each new responsibility I take on is with the purpose of helping others, something corporate jobs are often missing. I look forward to continuing to learn and advance at Christian Brothers over the course of the organization’s next chapter.”

Andrew Meyer

HBS Billing/Service Representative

“As a new employee to BMT/CBS, I have the great pleasure to share my knowledge and expertise with several different Orders who are in need of some guidance or overall assistance. I came to this new position with 15 years experience working with the Religious. I take great pride in walking with them as their groups are aging and in another case, as they are growing in their missions and ministries. As of September 2020, I am with BMT/CBS one year and it has been wonderful and fulfilling. I am excited and look forward to my journey with BMT/CBS and the prospect of meeting other Religious Orders who we may serve.”

Holly Borzacchiello

BMT Senior Consultant

“I have had the pleasure of interacting with our members through various outlets during my time at CBS. Whether it is providing informational and educational webinars or connecting through visual storytelling, helping members advance their missions with our services is what inspires me. I hope to continue to improve the digital landscape at CBS and at the organizations we serve.”

Kevin Schillinger

Multimedia Specialist

“When Brother Damian founded CBS 60 years ago, I imagine he would not have envisioned a time in which we would all need to be grounded — not just from airplanes and hotels, but from our perfectly functioning offices — with a “new normal” of working from our kitchen tables and relying on our new virtual video “phone” system in order to have face-to-face time with colleagues, clients and Trustees. With that said, I imagine Brother Damian would not have been surprised at the way the organization banded together in the most uncertain of times and how our employees all adapted at the drop of a hat in order to continue serving our members and clients foremost without interruption. Flexing and adapting to the environment and needs of our members seems to have always been part of our DNA.

The response to the unprecedented set of circumstances we’ve encountered during our 60th year is a prime example of the unwavering, client-first orientation that makes me proud to serve the Brothers in advancing the mission of Christian Brothers Services. While I’ve only caught the tail end of the ride over the last 60 years, I’m excited for what lies ahead and look forward to being a part of the bridge that helps carry forward the history, culture and legacies depicted in this book for the years (hopefully decades) to come.”

Steve Sliwinski

Chief Investment Officer

2019

Year of Lasallian Vocations

The Year of Lasallian Vocations marked the 300th anniversary of Saint John Baptist de La Salle’s entry into eternal life and celebrated the impact of the mission he started. CBS marked the occasion with events throughout the year to raise awareness of De La Salle’s mission and life.

Risk Pooling Trust 40th anniversary

Created as a cooperative “Church Plan” of committed Catholic Church organizations, the Risk Pooling Trust, a property/casualty membership program, began with nearly 100 Catholic organizations. It has grown in 40 years to include almost 1,500 Catholic organizations with a nearly 100% renewal retention rate.

2020

60th Anniversary

CBS celebrates its 60th anniversary with a series of initiatives, including a commemorative logo, new promotional items, articles in ongoing publications, building enhancements, and employee gifts.

COVID-19 Pandemic

As the COVID-19 pandemic swept across the world, CBS implemented its Business Continuity Plan. With offices being forced to close temporarily, work-from-anywhere protocols enacted in the Continuity Plan, allowed CBS business to continue uninterrupted.

Leadership Team

A Vision Forward

Little in the world remains the same as it was in 1960, and this book shows that CBS is no exception. Through the years, we have relocated our offices, transformed and improved the technology we use, and expanded and enhanced services for our members and participants.

However, as you peruse this anniversary book, it becomes clear that what is most significant to our success is not where CBS is located or even the tools we use to operate our business. It is our dedicated employees that make us what we are. Their stories are the CBS Story.

That is why we dedicated this book to CBS employees—past, present, and future. May it serve not only as a keepsake to reflect on our past but also as a reminder that CBS is a special organization with a unique mission.

Today, as we build upon the CBS Story with our own stories, we hope this book also serves as a guide for those who come after us. Our vision forward is to the continued success of CBS and to the future employees who will carry on its mission for the next 60 years—and beyond!



Top left to right

Brother Michael, FSC, Ed.D.
President / CEO
Hire Date – January, 2008

Richard McKenna
Chief Operating Officer
Hire Date – January, 2010

Michael Lesiak, CPA
Chief Financial and Administrative Officer
Hire Date – February, 2009

Terry Arya
Chief Marketing & Business Development Officer
Hire Date – February, 2011

Tom Drez
*Chief Information Officer,
Chief Privacy Officer, Chief Security Officer,
Managing Director, Information & Technology Services*
Hire Date – May, 1987

Steve Sliwinski, CFA, CAIA
Chief Investment Officer
Hire Date – July, 2017

With much appreciation to the Board of Directors, Trustees, Member Advisory Board, employees, retirees and other stakeholders who have helped Christian Brothers Services grow and succeed over the past six decades.

Leadership Team



Top left to right

John Airola

Managing Director, Health Benefit Services

Hire Date – September, 1990

Larry Baker

Managing Director, Risk Management Services

Hire Date – October, 2008

Buffy Blanton

Managing Director, Human Resources

Hire Date – April, 1992

Jim Ceplecha

Managing Director, Retirement Planning Services

Hire Date – March, 1982

Mary J. Foley

*Managing Director, Catholic School Management
& Mission Advancement*

Hire Date – August, 2017

Kelly Murphy

Director of Services, BMT

Hire Date – November, 1998 (BMT)

John Tortolani

Managing Director, BMT

Hire Date – January, 1976 (BMT)

Carolyn Randall

Controller

Hire Date – November, 1995

Our Mission

Christian Brothers Services strives to embody the vision and innovative spirit of Saint John Baptist de La Salle. This vision forward has served us from our beginnings and continues 60 years later. It is evident in our continually evolving and innovative programs and services for our members.

The pioneering and visionary spirit of Saint John Baptist de La Salle was the inspiration in 1960 for CBS founder Brother Joel Damian, FSC, and is apparent in all our divisions and departments today. As CBS begins its next 60 years, we will, in the Lasallian tradition, have a vision forward as our services grow to serve our members.



CHRISTIAN
BROTHERS
SERVICES