

# GATHERING AGENDA

## Presbytery of Milwaukee

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### Quarterly Stated Meeting

February 22, 2025

Hybrid meeting via zoom and in-person at **Forest Park Presbyterian Church**

2300 S. Sunny Slope Road, New Berlin, WI 53151

Elder Bill Leonard, Moderator; Rev. Kim Trimboli, Vice Moderator

**New business must be presented to Stated Clerk, Rev. Dr. Christian Boyd, in writing,**

**[statedclerk@pbymilwaukee.org](mailto:statedclerk@pbymilwaukee.org) by 8:00 am**

**and will be docketed once received.**

Times in **bold** indicate Order of the Day.

9:30 am	Registration	
<b>10:00 am</b>	<b>Business Meeting</b>	<b>Sanctuary</b>
	Welcome and Land Acknowledgement (p. 2)	Elder Bill Leonard
	Opening Prayer	
	Host Church Welcome	Rev. Kim Trimboli
	Consent Agenda (p. 5)	
	Introduction of New Elder Commissioners and Guests	
	Transitional Executive Presbyter's Report (p. 25)	Rev. Lisa Heckman
	Council (pp. 26-28)	Elder JP Kastner
	Bills and Overtures Committee (p. 29-30)	Rev. Kim Trimboli
	Proposed Amendments to Book of Order	
	Disaster Preparedness & Response Task Force (p. 31)	Elder Marilyn Stone
	Church Security and Safety Training (p. 32)	
	Committee on Local Arrangements (COLA) (p. 33)	Elder Lee Tan
	Nominating Committee (p. 34)	Rev. Katie Ebel
	New Business	
10:45 am	Education Hour – Rev. Cecelia Armstrong	Sanctuary
11:45 am	Lunch	Fellowship Hall
12:45 pm	Worship	Sanctuary

## **Presbytery of Milwaukee Land Acknowledgment Information**

The Presbytery of Milwaukee is situated on the ancestral homelands of a number of Native American nations. The Bodewadmi, the Hoocqk, and the Menominee Nations continue to exist among us. Listed below is a brief history of these tribes. Other Native American nations have crossed through these lands as well including the Kiikaapoi, the Peoria, the Sauk and Meskwaki, the Ochethi Sakowin, and the Myaamia.

As religious leaders, it is our responsibility to acknowledge this historical context and to be good partners with and advocates for the tribal nations on whose trust lands we inhabit. As we continue to live into this responsibility, additional information will be added to the Presbytery's website so that everyone within our Presbytery can have access to important historical and cultural information. In addition to the brief histories listed below, a map of Wisconsin showing Native American territories around 1800 and again currently is also included. This map comes from the [wisconsinfirstnations.org](http://wisconsinfirstnations.org) website.

### The Bodewadmi Peoples

The Bodewadmi peoples are better known as the Potawatomi. They are a Native American people of the Great Plains, upper Mississippi River, and western Great Lakes region. They traditionally speak the Potawatomi language, a member of the Algonquin family. The Potawatomi are part of a long-term alliance called the Council of Three Fires, with the Ojibway and Odawa (Ottawa). In this council, the Potawatomi are considered the “youngest brother” and are referred to in this context as Bodewadmi, a name that means “keepers of the fire.”

The Potawatomi are first mentioned in French records, which suggest that in the early 17<sup>th</sup> century, they lived in what is now southwestern Michigan. During the Beaver Wars, they fled to the area around Green Bay to escape attacks by both the Iroquois and the Neutral Nation who were seeking expanded hunting grounds. It is estimated in 1658 that the Potawatomi numbered around 3,000 people.

In the 18<sup>th</sup> century, the Potawatomi were pushed to the west by European/American encroachment and eventually removed from their lands in the Great Lakes region to reservations in Oklahoma. Under Indian Removal, they eventually ceded many of their lands, and most of the Potawatomi relocated to Nebraska, Kansas, and Indian Territory (Oklahoma). Some bands survived in the Great Lakes region and today are federally recognized as tribes. In Canada, over 600 First Nation governments or bands are recognized. In the US, 574 tribes or bands are federally recognized.

### The Hocak Peoples

The Hocak peoples, also known as the Ho-Chunk, Hoocagra, or Winnebago, are a Siouan-speaking Native American people whose historic territory includes parts of Wisconsin, Minnesota, Iowa, and Illinois. The Ho-Chunk was the dominant tribe in its territory in the 16<sup>th</sup> century with a population estimated at several thousand people. Ethnologists have speculated that, like some other Siouan peoples, the Ho-Chunk may have originated along the East Coast and migrated west in pre-colonial times.

## **Presbytery of Milwaukee Land Acknowledgment Information**

Ho-Chunk oral history states that their ancestors built the thousands of effigy mounds through Wisconsin and surrounding states during the Late Woodland period. The tribe historically adopted corn agriculture, cultivated wild rice, and gathered sugar from sugar maple trees. The Ho-Chunk nation is currently working on language restoration and has developed a Hoocak-language iOS app. Since 1988, it has pursued a claim to the Badger Army Ammunition Plant as traditional territory.

Today, Ho-Chunk people are enrolled in two federally recognized tribes, the Ho-Chunk Nation of Wisconsin, headquartered in Black River Falls, and the Winnebago Tribe of Nebraska. Since the late 20<sup>th</sup> century, both tribal councils have authorized the development of casinos, including a proposed casino for Beloit, WI.

### The Menominee Peoples

The Menominee, also spelled Menomini from the Ojibwe language, are a federally recognized nation of Native Americans. Their land base is the Menominee Indian Reservation in Wisconsin. Their historic territory originally included an estimated 10 million acres in present-day Wisconsin and the Upper Peninsula of Michigan. The Menominee are part of the Algonquian language family of North America.

The Menominee have traditionally practiced logging in a sustainable manner. In 1905, a tornado swept through the reservation, downing a massive amount of timber. Because the Menominee-owned sawmills could not harvest all the downed timber before it decomposed, the United States Forest Service became involved in managing their forest. Despite the desire of the tribe and Senator Robert La Follette for sustainable yield policy, the Forest Service conducted clear cutting on reservation lands until 1926. The Department of the Interior regained control of the territory. During the next dozen years, it reduced the cutting of salable timber to 30 percent to allow the forest to regenerate. In 1952, the United States Court of Claims settled a law suit awarding the Menominee \$8.5 million for damages done to their forest.

Federal recognition of the tribe was terminated in the 1960s under a policy of the time which stressed assimilation. During that period, the Menominee brought a landmark case in Indian law to the United States Supreme Court to protect their treaty and hunting rights. The US Supreme Court found in favor of the tribe. The tribe regained federal recognition in 1973 in an act of Congress and re-established its reservation in 1975. The tribe currently has about 8,700 members.

**Presbytery of Milwaukee  
Land Acknowledgment Information**



**Map Key**

Tribal Lands circa 1800:

Present-day Native Nations:

\*Map from wisconsinfirstnations.org

\* Brothertown is not state or federally recognized.

## Presbytery of Milwaukee

### CONSENT AGENDA

February 22, 2025

The following items appear to require no debate. Therefore, they are listed together and will be voted upon as one motion. However, any presbyter may request that any item of business be removed from the Consent Agenda for individual consideration. The Consent Agenda includes the written reports of presbytery committees and commissions. The moderator's contact information is included with each agenda item. Presbyters are encouraged to contact the moderator before the meeting with questions.

The Stated Clerk moves:

- The agenda for February 22, 2025, stated that the gathering of the Presbytery should be adopted.
- The minutes of the stated Presbytery meeting on [November 9th](#) and [December 12th](#), which are called meetings of the Presbytery, should be approved.
- Approve the 2024 plan to address the imbalance of ministers and elders per the Stated Clerks report.

The Bills and Overtures Committee moves:

- that the presbytery approves GA Amendments 24B and 24D through 24L.

To receive the following reports:

- Stated Clerk
- Transitional Executive Presbyter Report
- Council Report
- Council Letter
- Bills and Overtures Report
- Bills and Overtures Summary of Amendments Chart
- Disaster Preparedness and Response Task Force Report
- Committee on Local Arrangements Report
- Nominating Committee Report
- Commission on Congregational Vitality Report
- Personnel Report
- Commission on Pastoral Ministries Report
- Presbytery Balance Sheet
- Presbytery Budget vs. Actual
- Foundation Report
- Foundation Balance Sheet
- Morgan Stanley Reconciliation

Digital recording of the business meeting of the Presbytery will be used to draft the written minutes that, when approved, will become the official record of this meeting's business. The recording will not be retained after the draft minutes are prepared.

## **Presbytery of Milwaukee**

### **STATED CLERK'S REPORT**

February 22, 2025

#### **Annual Session Administrative Review Report for 2024**

- Christ minutes and rolls for 2022 and 2023 were approved with no exceptions on May 21, 2024.
- Jerusalem 2023 minutes, rolls, manual, and bylaws were approved with no exceptions on February 24.
- Second Racine 2023 minutes, rolls, and manual were approved with no exceptions on February 24.
- Heritage 2022 and 2023 minutes and rolls were approved with no exceptions on February 24.
- Covenant Racine 2021, 2022, and 2023 minutes, rolls, and manual were approved with no exceptions in August.
- Living Hope 2023 minutes were approved with one exception on November 24.

All Sessions must have their minutes, rolls, manual, and bylaws reviewed by the Stated Clerk each year per the *Book of Order* and the Presbytery's Manual of Administrative Operations. The documents can be presented to the Stated Clerk at any Presbytery Gathering or by appointment.

#### **Annual Statistic Report**

Please find attached the following reports:

- 2024 Annual Church Statistic Report Overview of Churches of the Presbytery; and
- 2024 Sessions who successfully filed their annual statistics reports with the Office of the General Assembly.
- The 2024 active membership numbers will be the basis of the 2026 Per Capita assessment to the presbytery by the General Assembly and Synod (000000 active members as of 1/1/2025).

#### **Annual Administrative Review by the Synod**

The Stated Clerk will submit the required documents of the Presbytery of Milwaukee, which include minutes, rolls, manual, and bylaws, to the Synod for the annual administrative review on May 7-9, 2025.

#### **The 2025 Commission/Committee Moderators**

- Commission on Congregational Vitality - TBD
- Commission on Pastoral Ministries – Teresa Larson (M) Immanuel
- Commission on Transitional Ministries - Will Houts (M) Living Hope
- Council – JP Kastner (E) Calvary
- Foundation President - Kevin Sjostrom (E) Wauwatosa
- Nominating Committee – Katie Ebel (M) First Kenosha
- Personnel Committee – TBD
- Presbytery Planning Commission - TBD

**2025 ANNUAL REPORT OF THE STATED CLERK TO THE PRESBYTERY OF MILWAUKEE**

Number of Churches in the Presbytery 1/1/25	40
PCUSA Minister Members of the Presbytery 1/1/25	97

2024 Roll Changes Recorded with Office of the General Assembly

*Ministerial Necrology*

- Hudson, Paul F 4/12/2024
- Swanson, James Harold 11/8/2023

*Ministers Dismissed To Other Presbyteries*

- Rand, James M 1/16/2024 New Hope

*Ministers Received From Other Presbyteries*

- Bush, Randall K 3/15/2024 Baltimore
- Lyter Bright, Laura 5/7/2024 Winnebago
- Monroe-Clark, Michele 6/4/2024 Homestead
- Pagels, Deborah 7/9/2024 Winnebago

*Pending Received From:*

- Genesee Valley - Elias James Henry
- Blackhawk - Rebecca White-Newgren

**2025 REPORT ON THE IMBALANCE OF MINISTER AND ELDER REPRESENTATION  
IN THE PRESBYTERY OF MILWAUKEE**

When the number of resident ministers entitled to vote in the presbytery is greater than the number of elders entitled, the imbalance will be addressed according to G-3.03, and it is recommended that additional elder commissioners be empowered according to their committee/commission membership.

**MINISTER MEMBERS OF THE PRESBYTERY**

Minister Members on the Rolls January 1, 2025	116 (include Ecum)
Less non-resident Ministers and non-active HR Ministers	-46 HR
	-14 Non-Res

**REGULARLY VOTING MINISTER MEMBERS** **56**

**ELDER COMMISSIONERS FROM CHURCHES**

One vote	38
Two votes*	2

- \*Churches reporting a membership of over 500 in the 2022 GA Statistics
- Mequon, Crossroads
- Milwaukee, Immanuel

**REGULARLY VOTING ELDERS** **42**

**IMBALANCE (Ministers minus Elders)** **14**

**The Stated Clerk moved that the imbalance of ministers and elders be addressed as follows:**

That the imbalance of minister and elder representation be addressed, effective May 21, 2024, by allowing ruling elders who are elected to a committee of Presbytery, Commissioned Ruling Elders with a commission, Certified Christian Educators, members of administrative commissions, GA/Synod commissioners and YADS, Treasurer, and Associate Stated Clerk to attend Presbytery as voting members.

Votes are given to Elder members of the following standing committees and commissions of presbytery:

CCV	2
CTM	2
CPM	2
PPC	1
Council	2
Nominating	1
Foundation	1
Commissioned Pastor(s)/Ruling Elder(s)	1
Synod Commissioner/YAD	1
<u>GA Commissioner</u>	<u>1</u>
Total	14

**This would empower 14 additional Elder Commissioners.**



**Minister and Commissioned Pastor Roll of the Presbytery of Milwaukee 1/1/2025**

<b>Organization_Name</b>	<b>City</b>	<b>Last_Name</b>	<b>Minister City</b>	<b>Minister State</b>	<b>Minister Occ</b>
West Granville	Milwaukee	Anderson, Dee Martin	Milwaukee	WI	101
Delafield	Delafield	Blanks, Nicole Anne	Milwaukee	WI	101
Southminster	Waukesha	Boyd, Christian D	Waukesha	WI	101
Grace	Beaver Dam	Davis, Christopher E	Beaver Dam	WI	101
Sun Valley	Beloit	Ewing, David Flagg	Beloit	WI	101
Jerusalem	Wales	Holmes, Andrew	Wales	WI	101
Rock Prairie	Janesville	Jones, Bruce A	Cambridge	WI	101
Linn	Lake Geneva	Kirkpatrick, Lisa Lynne	Lake Geneva	WI	101
Kettle Moraine United	Hartland	Lee, Matthew A	Hartland	WI	101
First	Kenosha	Loveall, Lance Howard	Kenosha	WI	101
North Shore	Shorewood	Oakes Daugherty, Jeannine	Shorewood	WI	101
Wauwatosa	Wauwatosa	Swanson, Brett Jeffery	Wauwatosa	WI	101
Forest Park	New Berlin	Trimboli, Kimberly B	Milwaukee	WI	101
First	Racine	Utley, Darren W	Mount Pleasant	WI	101
Immanuel	Milwaukee	Ater, Robert Winters	Milwaukee	WI	103
Immanuel	Milwaukee	Larson, Teresa			103
Crossroads	Mequon	Samuelson, Scott David	Deerfield	IL	103
Immanuel	Milwaukee	Stoll, Susan	Milwaukee	WI	103
Grace	Milwaukee	Anderson, Theodore V	New Berlin	WI	105
Immanuel	Milwaukee	Bush, Randall K			105
Heritage	Muskego	Henrichs, Michelle			105
First	Clinton	White-Newgren, Rebecca	Rockford	IL	105
First	Richfield	%Manthei, Cathy	West Allis	WI	107
Faith Springs	Pewaukee	Ebel, Katherine	Waukesha	WI	108
Covenant	Racine	Gleichauf, Jennifer Ann	Milwaukee	WI	108

Living Hope	Menomone e Falls	Houts, Willem Paul	Sussex	WI	108
Lisbon United	Sussex	Jones, Keith E	Pewaukee	WI	108
Bethesda	Waukesha	Patton, Lori C	Greenfield	WI	108
Covenant	Racine	Walker Cleaveland, Sarah	Racine	WI	108
First	Kenosha	Hill, Robert D	Iowa City	IA	109
Immanuel	Milwaukee	Johnstone, William H	Milwaukee	WI	109
Greenfield Avenue	West Allis	Tarvid, Kevin George	West Allis	WI	109
Delafield	Delafield	Towner, Margaret E	Sarasota	FL	109
Grace United	Ft Atkinson	#Powell, Lori	Madison	WI	151
Christ United	Milwaukee	#Clippis, LaQuetta	Milwaukee	WI	158
Tippecanoe	Milwaukee	#Eckert, Patricia	Milwaukee	WI	158
United Church of Beloit	Beloit				158
First	Waukesha	#Simmons, David	Waukesha	WI	158
		Baumann, John K		WI	299
		Bergeson-Graham, Debra Jo Ann		WI	299
		Bernhardt, Joanne		WI	299
		Block, Deborah A		WI	299
		Carlson, Jeffrey		WI	299
		Cistrunk, Terrell H		WI	299
		Clark, Melanie Hammond		IL	299
		Clarke, Donald R		WI	299
		Coons, Martha		WI	299
		Cross-Dukes, Volina		WI	299
		DeCamp, James A		IN	299
		Dillon, John		WI	299
		Dow, Jean		WI	299
		Fisher, James C		WI	299
		Grimbol, William R		WI	299
		Guyer, James		IA	299
		Hagen, Karen		WI	299

		Halverson, Dorothy		WI	299
		Hansen, John D		WI	299
		Hennesy, Terrance P		WI	299
		Holmes-Jensen, Judith		WI	299
		Johnstone, William H		WI	299
		Jones, Keith E		WI	299
		Jordan, Barbara		WI	299
		Kamerling, Garrett J		WI	299
		Kramer, Gerald L		WI	299
		McCalister, Alan S		WI	299
		McKeegan-Guinn, Susan R		WI	299
		Millar, James Dean			299
		Millar, Victoria		WI	299
		Neal, Catherine		WI	299
		Perkins, David		WI	299
		Petterson, William		WI	299
		Schultz, Gary		IL	299
		Stafford, Elizabeth B		NH	299
		Stirrat, Ian Anthony		WI	299
		Swanson, James Harold		WI	299
		Talley, Dee		NY	299
		Talley, Leanne Kelly		NY	299
		Tarvid, Kevin George		WI	299
		Timberlake, Robert W		WI	299
		Wanner, Thomas R		KY	299
		Wickersham, Carol		WI	299
		Williams, Thomas L	Whitefish Bay	WI	299
		Woehl, Roger L		WI	299

		Woehrle, Thomas H		WI	299
		Zieche, William W		WI	299
Presbytery / San Jose		#Gonzales Ortega, Dan		WI	301
Presbytery / Kairo Collective NWC		Fraleay, Mark		WI	301
Presbytery		Heckman, Lisa S		WI	302
Presbytery		Boyd, Christian D		WI	303
Presbytery		Gibbs, Ann Rane		WI	305
		Serovy, Mary Lynn			404
		Lucio, Antonio		WI	501
Carroll U		#Langholz, Anna		WI	641
Carroll U		#McCord, Elizabeth EP		WI	641
Carroll U		Henry, Elias James		WI	641
		Goetz, Thomas H		Japan	644
Princeton Sem		Allen, Kerri North		NJ	701
		Hittle, Erin L		WI	701
		Houts, Traci		WI	701
		Jordan, Sarah		WI	701
		Monroe-Clark, Michele		WI	701
		Pagels, Deborah		WI	701
		Fringer, Steven		WI	791
		Lyter Bright, Laura		WI	791
		Bratt, Susan A Sytsma		WI	797
		Carlin, Mary			797
		Craig, Julie Ann		WI	797
		Horner-Ibler, Barbara		WI	797
		Loveall, Paige		WI	797
		Ludwig, Meagan		WI	797
		McCullough, Lisa Lynn		CA	797
		Nicolaisen, Fiona A		WI	797
		Patton, Beth		WI	797
		Steiner, Stephanie			797

		Walker Cleaveland, Adam		WI	797
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**Preparation for Ministry: Roll of those Under Care of the Presbytery (G-2.06)**

**Inquirers**

- Gina Struensee (Grace, Beaver Dam; MDiv from Dubuque completed, May 2023) - Inquirer
- J.P. Kastner (Calvary; MDiv from Louisville anticipated May 2027) - Inquirer

**Candidates**

- Madeline Lannon (Faith Springs; MDiv from Princeton completed, May 2023) – Candidate, Certified Ready to Receive a Call
- Morgan Edwards (Wauwatosa; MDiv from Princeton anticipated May 2025) – Candidate
- Sara Zallar (Tippecanoe; MDiv from Western Seminary anticipated May 2025) - Candidate
- Lance Jones (Good Shepherd Trinity; MDiv from McCormick completed May 2011) - Candidate

**Churches of the Presbytery of Milwaukee**

NAME	LOCATION				PIN
Apostle	West Allis	West Allis	WI	Milwaukee	10690
Bethesda	Waukesha	Waukesha	WI	Milwaukee	9463
Calvary	Milwaukee	Milwaukee	WI	Milwaukee	9417
Christ United	Milwaukee	Milwaukee	WI	Milwaukee	9446
Covenant	Racine	Racine	WI	Milwaukee	10198
Crossroads	Mequon	Mequon	WI	Milwaukee	9445
Delafield	Delafield	Delafield	WI	Milwaukee	9406
Faith	Franklin	Franklin	WI	Milwaukee	9418
Faith Springs	Pewaukee	Pewaukee	WI	Milwaukee	1634
First	Clinton	Clinton	WI	Milwaukee	9374
First	Janesville	Janesville	WI	Milwaukee	9379
First	Kenosha	Kenosha	WI	Milwaukee	9412
First	Racine	Racine	WI	Milwaukee	9433
First	Waukesha	Waukesha	WI	Milwaukee	9436
First	Richfield	Richfield	WI	Milwaukee	9444
Forest Park	New Berlin	New Berlin	WI	Milwaukee	9439
Good Shepherd Trinity	Milwaukee	Milwaukee	WI	Milwaukee	9428
Grace	Beaver Dam	Beaver Dam	WI	Milwaukee	9402
Grace	Milwaukee	Milwaukee	WI	Milwaukee	9419
Grace United	Fort Atkinson	Ft Atkinson	WI	Milwaukee	11054
Greenfield Avenue	West Allis	West Allis	WI	Milwaukee	9440
Heritage	Muskego	Muskego	WI	Milwaukee	9449
Immanuel	Milwaukee	Milwaukee	WI	Milwaukee	9420
Jerusalem	Wales	Wales	WI	Milwaukee	9462
Kettle Moraine United	Hartland	Hartland	WI	Milwaukee	9431
Linn	Lake Geneva	Lake Geneva	WI	Milwaukee	1766

Lisbon United	Sussex	Sussex	WI	Milwaukee	2249
Living Hope	Menomonee Falls	Menomonee Falls	WI	Milwaukee	9447
North Lima	Lima	Whitewater	WI	Milwaukee	9443
North Shore	Shorewood	Shorewood	WI	Milwaukee	9425
Ottawa	Dousman	Dousman	WI	Milwaukee	9407
Rock Prairie	Janesville	Janesville	WI	Milwaukee	1943
Second	Racine	Racine	WI	Milwaukee	9434
Southminster	Waukesha	Waukesha	WI	Milwaukee	3024
Sun Valley	Beloit	Beloit	WI	Milwaukee	9372
Tippecanoe	Milwaukee	Milwaukee	WI	Milwaukee	9426
United Church of Beloit	Beloit	Beloit	WI	Milwaukee	9371
Vernon	Big Bend	Big Bend	WI	Milwaukee	2183
Wauwatosa	Wauwatosa	Wauwatosa	WI	Milwaukee	9437
West Granville	Milwaukee	Milwaukee	WI	Milwaukee	9441

**Summary Of Church Changes for 2024**

**080/388 - Milwaukee**

**Beginning Number of Churches - 1/01/2024** A. 40

**Number of Churches Organized** B. \_\_\_\_\_

<u>Pin</u>	<u>Name</u>	<u>Location</u>	<u>Organized Date</u>
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**Number of Churches Received From Other Presbyteries** C. \_\_\_\_\_

<u>Pin</u>	<u>Name</u>	<u>Presbytery</u>	<u>Received Date</u>
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**Number of Churches Received From Other Denominations** D. \_\_\_\_\_

<u>Pin</u>	<u>Name</u>	<u>Denomination</u>	<u>Received Date</u>
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**Total of Church Additions to Your Presbytery (Add lines B, C and D)** E. \_\_\_\_\_

**Subtotal of Churches in Your Presbytery (Add lines A & E)** F. \_\_\_\_\_

**Number of Churches Dissolved** G. \_\_\_\_\_

<u>Pin</u>	<u>Name</u>	<u>Location</u>	<u>Dissolved Date</u>
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**Number of Churches Dismissed to Other Presbyteries** H. \_\_\_\_\_

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**Number of Churches Dismissed to Other Denominations** I. \_\_\_\_\_

<u>Pin</u>	<u>Name</u>	<u>Location</u>	<u>Dismissed Date</u>
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**Total Number of Church Losses (Add lines G, H and I)** J. \_\_\_\_\_

**Subtotal (Subtract line J from line F)** K. \_\_\_\_\_

**Mergers**

<u>Pin</u>	<u>Name</u>	<u>Location</u>	<u>Merged Date</u>
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**Subtotal of Merges (Total Number of churches in the merger)** L. \_\_\_\_\_

**Total Number of Churches as of 12/31/2024 (Subtract line L from line K)** M. 40

**NCD Churches**

Pin                      Name    Location

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**New Worshipping Communities**

Name

Mustard Seed Journey NWC

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# Minister Summary

**080388 Milwaukee**

## Recap

<b>Losses</b>		<b>Gains</b>		Minister Totals as of 1/1/2024	97
Necrology	2	Ordained		Subtract Losses	93
Dismissed - Presby	2	Received - Presby	4	Add Gains	97
Dismissed - Denom		Received - Denom		Ministers On Roll as of 12/31/2024	97
Other Removals		Restored		In Transit	2
<b>Total</b>	4	<b>Total</b>	4		

### Ministerial Necrology

<u>Id</u>	<u>Name</u>	<u>Date</u>
M00006214	Hudson, Paul F	4/12/2024
M 00017325	Swanson, James Harold	11/8/2023

### Ministers Dismissed to Other Presbyteries

<u>Id</u>	<u>Name</u>	<u>Date</u>	<u>Dismissed To</u>
M00011032	Rand, James M	1/16/2024	New Hope

### Ministers Dismissed to Other Denominations

<u>Id</u>	<u>Name</u>	<u>Date</u>	<u>Dismissed To</u>
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# Minister Summary

## Permanent Removals From A Roll

<u>Id</u>	<u>Name</u>	<u>Date</u>	<u>Constitution Provision</u>
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## Ministers Ordained By This Presbytery

<u>Id</u>	<u>Name</u>	<u>Date</u>
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## Ministers Received From Other Presbyteries

<u>Id</u>	<u>Name</u>	<u>Date</u>	<u>Received From</u>	<b>Pending Received From:</b>
M00019057	Bush, Randall K	3/15/2024	Baltimore	M00504843 Genesee Valley - Elias James Henry
M00039264	Lyter Bright, Laura	5/7/2024	Winnebago	M00037715 Blackhawk - Rebecca White-Newgren
M00036963	Monroe-Clark, Michele	6/4/2024	Homestead	
M00503969	Pagels, Deborah	7/9/2024	Winnebago	

## Ministers Received From Other Denominations

<u>Id</u>	<u>Name</u>	<u>Date</u>	<u>Received From</u>
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## Ministers Restored To Roll

<u>Id</u>	<u>Name</u>	<u>Date</u>
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## 2024 Presbytery Statistical Report

**Presbytery** Milwaukee  
**Address** PO Box 1857, Waukesha, WI 53187-1857  
**Phone** 414-292-2740 **Fax**  
**Email** [office@pbymilwaukee.org](mailto:office@pbymilwaukee.org)  
**Web Site** [www.pbymilwaukee.org](http://www.pbymilwaukee.org)



### Membership

Prior Active Members	<b>5100</b>	Adjusted membership	<b>5087</b>
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<b>Gains</b>		<b>Losses</b>	
Certificate	<b>38</b>	Certificate	<b>49</b>
Youth Professions	<b>31</b>	Deaths	<b>88</b>
Professions & Reaffirmations	<b>57</b>	Deleted for any Other Reason	<b>352</b>
<b>Total Gains</b>	<b>126</b>	<b>Total Losses</b>	<b>489</b>
<b>Total Ending Active Members</b>	<b>4724</b>		

<b>Baptisms</b>		Average Weekly Worship Attendance	<b>1978</b>
Presented by Others	<b>46</b>	Friends of the Congregation	<b>600</b>
At Confirmation	<b>8</b>	Ruling Elders on Session	<b>262</b>
All Other	<b>1</b>	Do you have Deacons? Yes / No	<b>24 / 9</b>

<b>Age Distribution of Active Members</b>		<b>People with Disabilities</b>	
17 & Under	<b>127</b>	Hearing impairment	<b>151</b>
18 - 25	<b>321</b>	Sight impairment	<b>56</b>
26 - 40	<b>484</b>	Mobility impairment	<b>176</b>
41 - 55	<b>685</b>	Other impairment	<b>158</b>
56 - 70	<b>1181</b>		
Over 70	<b>1362</b>	<b>Gender Distribution</b>	
<b>Total Age Distribution</b>	<b>4160</b>	Women	<b>2407</b>
		Men	<b>1779</b>
		Non-Binary	<b>10</b>

<b>Youth in Congregation</b>			
Age 4 and under	<b>152</b>	Middle School (6th – 8th grade)	<b>160</b>
Elementary School (K-5th grade)	<b>304</b>	High School (9th – 12th grade)	<b>202</b>
		<b>Total Youth</b>	<b>818</b>

<b>Racial Ethnic</b>			
Asian/Pacific Islander/South Asian	<b>39</b>	Native American/Alaska Native/Indigenous	<b>2</b>
Black/African American/African	<b>124</b>	White	<b>3945</b>
Middle Eastern/North African	<b>6</b>	Multiracial	<b>26</b>
Hispanic/Latino-a	<b>47</b>		
		<b>Total Racial Ethnic</b>	<b>4189</b>

<b>Budgeted Income</b>	<b>7,617,034</b>
<b>Budgeted Expense</b>	<b>8,752,531</b>

<b>Receipts</b>			
Regular Contributions	<b>6,908,894</b>	Bequests	<b>110,007</b>
Capital Building Fund	<b>761,471</b>	Other Income	<b>301,006</b>
Investment Income	<b>1,737,932</b>	Subsidy or Aid	<b>7,505</b>

<b>Expenditures</b>			
Local Program	<b>7,358,201</b>	Investment Expenditures	<b>2,065,121</b>
Local Mission	<b>678,527</b>	Per Capital Apprt	<b>209,609</b>
Capital Expenditures	<b>1,495,922</b>	Other Mission	<b>264,968</b>

# 2024 Presbytery Statistical Report

<u>Location</u>	<u>Pin</u>	<u>Organization Name</u>	<u>Stats Submitted</u>	<u>Membership Accepted</u>	<u>Congregation Accepted</u>	<u>Racial Ethnic Accepted</u>	<u>Finance Accepted</u>	<u>Suppl. Questions</u>
Beaver Dam	9402	Grace	Y	Y	Y	Y	Y	
Beloit	9371	United Church of Beloit	Y	Y	Y	Y	Y	
	9372	Sun Valley	Y	Y	Y	Y	Y	
Big Bend	2183	Vernon						
Clinton	9374	First	Y	Y	Y	Y	Y	
Delafield	9406	Delafield	Y	Y	Y	Y	Y	
Dousman	9407	Ottawa	Y	Y	Y		Y	
Fort Atkinson	11054	Grace United						
Franklin	9418	Faith	Y	Y	Y	Y		
Hartland	9431	Kettle Moraine United	Y	Y	Y	Y	Y	
Janesville	1943	Rock Prairie	Y		Y	Y	Y	
	9379	First						
Kenosha	9412	First	Y	Y	Y	Y	Y	
Lake Geneva	1766	Linn						
Lima	9443	North Lima	Y		Y	Y		
Menomonee Falls	9447	Living Hope	Y	Y	Y	Y	Y	
Mequon	9445	Crossroads	Y	Y	Y	Y	Y	
Milwaukee	9417	Calvary	Y	Y	Y	Y	Y	
	9419	Grace	Y	Y	Y	Y	Y	
	9420	Immanuel	Y	Y	Y	Y	Y	
	9426	Tippecanoe						
	9428	Good Shepherd Trinity	Y	Y	Y	Y	Y	
	9441	West Granville	Y	Y	Y	Y	Y	
Muskego	9446	Christ United	Y	Y	Y	Y	Y	
	9449	Heritage		Y	Y	Y	Y	
	9439	Forest Park						
	1634	Faith Springs	Y	Y	Y	Y	Y	
Racine	10198	Covenant	Y	Y	Y	Y	Y	
	9433	First	Y	Y	Y	Y	Y	
	9434	Second	Y	Y	Y	Y	Y	
Richfield	9444	First	Y	Y	Y	Y	Y	
Shorewood	9425	North Shore	Y	Y	Y	Y	Y	
Sussex	2249	Lisbon United		Y	Y	Y	Y	

<u>Location</u>	<u>Pin</u>	<u>Organization Name</u>	<u>Stats Submitted</u>	<u>Membership Accepted</u>	<u>Congregation Accepted</u>	<u>Racial Ethnic Accepted</u>	<u>Finance Accepted</u>	<u>Suppl. Questions</u>
Wales	9462	Jerusalem	Y	Y	Y	Y	Y	
Waukesha	3024	Southminster	Y	Y	Y	Y	Y	
	9436	First	Y	Y	Y	Y	Y	
	9463	Bethesda	Y	Y				
Wauwatosa	9437	Wauwatosa	Y	Y	Y	Y	Y	
West Allis	10690	Apostle		Y	Y	Y		
	9440	Greenfield Avenue	Y	Y	Y	Y	Y	
<b>Total</b>			31	32	33	32	30	0

Greetings Friends in Ministry!

It's hard to believe that it has been one year since I was installed as Moderator of the Presbytery of Milwaukee. And what a year it has been! We have gathered for three of our four quarterly meetings, and as those who have attended know, they weren't exactly short business meetings! But that is because the Presbytery of Milwaukee is filled with a diverse array of people with myriad thoughts and opinions on so many issues. That said, what we all share is a sincere dedication to the work and well-being of this Presbytery and to ensuring that ministry is done- and done well- in the Southeastern Wisconsin region. We also had a special called meeting where we affirmed the amazing work of the Vernon Administrative Commission as we voted to gift the property and buildings of the former Vernon Church to the Vernon Child Development Center to ensure a need is met in that community and the legacy of Vernon Presbyterian Church lives on for years to come. Thank you so much to the members of that commission!

When I became Moderator, one of my goals was to build and strengthen relationships I had made over the past ten years of involvement in the Presbytery, and also to develop new connections across the Presbytery. It was my instinct that investing in relationships across all of our churches would help to remind me, indeed remind all of us, why we do what we do. To that end, I set upon a journey to visit as many of the 41 congregations in our Presbytery as I could in that 52 week stretch. I am happy to report that by the time we meet on February 22, I will have accomplished that goal! It has been such a joy to fellowship with all of you across the region. We worshipped together in large, modern sanctuaries, and small, centuries old sacred spaces; we gathered in large numbers and as the faithful few; we sang along to songs accompanied by bellowing pipe organs, flowing pianos, modern worship bands...and sometimes with no accompaniment at all.

But no matter how or what style of worship we used, the one thing that was always evident was the deep, abiding love for God and each other that existed in every place I visited. You all, without exception, welcomed me into your spaces and made me feel at home. We talked about what was happening at the Presbytery and at your churches. We shared stories about our lives and about the church as it was, as it is, and as we hope it can be; stories full of hope and dreams, fears and anxieties. And we talked a lot about cows as well! I got to participate children's ministries, share many meals, preach, and even experience my first traditional Mexican posada (thank you, San Jose!)

Visiting all of you renewed my belief that the future of the church is strong when we remain connected. At the heart of being Presbyterian is being a part of the connectional church. Together we are stronger and better equipped to face the challenges that are ahead (and we know there will be challenges.) I pray we all continue to welcome strangers into our congregations and show them the same radical hospitality that was shown to me at every stop on my journey, the very radical hospitality that Jesus calls us to extend. I also pray that we ourselves seek opportunities to be the strangers in the midst of people/places/experiences within which we are not always familiar or entirely comfortable. It is in these moments that we grow in our faith and learn new and exciting things about the church, the world, and ourselves. There is so much beauty and

excitement and knowledge to be gained when we step outside the walls in which we feel so safe and sound and get involved in the world around us. Whether that means visiting a neighboring church to see how they do worship, partnering with another congregation to grow ministry, maybe even attending your first Presbytery meeting in person! (I know we'd all love to meet you!) Ministry does not happen by accident. It is not magic. Ministry happens when people of faith join together with intentionality to commit to the hard work of living out God's kingdom on earth. The path is not always linear. At times it isn't even obvious where it is leading us. But when we join together, we are better for the experience and, God willing, our ministry will be a blessing to the communities in which we live and work and worship.

Friends, it has been an honor and a privilege to serve as your Moderator this past year. I know the good work that we have been doing will continue as the incredible Kim Trimboli takes on the Moderator duties. I look forward to continuing to serve alongside everyone as we continue to do this hard, exciting, daunting, invigorating, always important work of being the church in this modern world.

Humbly yours,

Bill Leonard, Moderator, Presbytery of Milwaukee





February 7, 2025

Dear Friends,

As my time with the presbytery comes to a close, I want to express my gratitude for the opportunity to serve alongside such dedicated and faithful individuals. My contract will conclude on March 31st, and after much reflection, I have decided not to seek renewal.

Serving as the Transitional Executive Presbyter has been a meaningful and enriching experience, and I have great appreciation for the diverse and creative ministries of this presbytery. While I have discerned that this role is not the best long-term fit for me, I remain deeply grateful for the relationships formed and the shared commitment to God's work. I have accepted a new calling as Interim Pastor of the Lewistown Presbyterian Church in Lewistown, PA, beginning April 1st.

In the time remaining, I am committed to working closely with staff, Council, Finance, Personnel, and others to ensure a smooth transition. The Transition Team is already working with a LeaderWise consultant, and I will gladly offer any insights or support that may be helpful as they move forward.

Per my contract, I am entitled to two remaining weeks of vacation, which I will be taking March 18-31.

I leave with a heart full of gratitude for the privilege of serving in southeastern Wisconsin and pray that the presbytery may continue to be blessed in the seasons ahead.

Grace and Peace,

**Lisa**

Rev. Lisa S. Heckman  
Transitional Executive Presbytery

**COUNCIL REPORT TO  
PRESBYTERY OF MILWAUKEE  
FEBRUARY 22, 2025**

**Council has no business to bring before the Assembly for action at this meeting, but reports on the following:**

1. As we all know by now, Rev. Lisa Heckman has accepted a new call and will not renew her Transitional Executive Presbyter contract with the Milwaukee Presbytery. Past and present moderators of both Council and Personnel have met, continue to meet, and are working with respective committee members and remaining staff to outline an action plan.

As the Transition Team continues its visioning work, Council and Personnel will work with remaining staff to ensure operations continue in all areas. While the transition period will require patience and flexibility, the focus remains on providing support to all ministries and ensuring the Presbytery's mission continues forward with strength and unity.

We are grateful for the leadership and dedication of Rev. Heckman during her time with us, and look forward to the continued journey ahead.

2. Every January, Council elects a moderator for the year. At its January meeting this year, Council elected John-Paul ("JP") Kastner as moderator. He succeeds Kent Tess-Mattner. Although Kent will remain a member of Council through 2026, he is transferring his moderating energy to serving on the Transition Team. Going forward, to get matters on Council's agenda, or to seek guidance or approval from Council, please contact JP at [john.paul.kastner@gmail.com](mailto:john.paul.kastner@gmail.com), or 414-731-9059.

3. Council added elders Kent Tess-Mattner and Tracey Pomeroy to the Transition Team.

4. Presbytery has formed an Audit Team consisting of Treasurer Steve Carlton, members of the Finance Committee (Gil Kirkpatrick, moderator, Sue Fellows, and JT Gall), Christina Trompler, and Freda Johnson. It has begun reviewing the finances of both the Presbytery and the Presbytery Foundation from 2021 through 2024, inclusive.

5. Representatives of Council and its Personnel Committee have met every two weeks with TEP Lisa Heckman since her new TEP contract was entered into effective October 1, 2024, and are satisfied that her performance has met the specific performance goals set forth in that contract.

6. Council has added Judy Jaggard to the team that will explore possible merger with the John Knox Presbytery. She joins Dave Ewing, Bruce Jones and Christian Boyd on this team.

7. Council formally formed the Committee on Local Arrangements for our Presbytery hosting the General Assembly in 2026 as an agency of Council. Presbytery continues to need members for this committee, which committee is being led by Lee Tan. If you are interested in serving on this Committee, please contact Lee Tan at [lee.h.tan@gmail.com](mailto:lee.h.tan@gmail.com) or Council Moderator JP Kastner.

8. Council approved an extension of the lease whereby Grace Presbyterian Church leases its worship space to the New Covenant AG Hmong Church of Milwaukee in a manner that does not interfere with any of Grace's programming.

9. Council appointed Kate Hopta as a delegate to the Interfaith Council, class of 2027. She joins our delegate Paul Neymeyer, class of 2025.

10. Council received a Ghana Mission Network Interest and Commitment Survey from the PC(USA). It decided that the Presbytery would not renew active participation in the Ghana Mission Network at this time, but remain on its email list as a Presbytery.

11. Council approved Dan Gonzalez Ortega exceeding his professional expense budget line by the amount needed to reimburse him for in-Mexico airfare related to him trying to expedite renewal of his visa. The amount involved is less than \$400.

Respectfully submitted,

John-Paul ("JP") Kastner  
New Moderator of Council  
[john.paul.kastner@gmail.com](mailto:john.paul.kastner@gmail.com)  
414-731-9059

Kent A. Tess-Mattner  
Past Moderator of Council  
[tess-mattner@outlook.com](mailto:tess-mattner@outlook.com)  
414-315-8412

With Rev. Lisa Heckman's announcement that she has accepted a new call and will not renew her contract with the Presbytery of Milwaukee, the past and present moderators of both the Council and the Personnel Committee have met and are working with their respective groups to outline an action plan.

As the Transition Team continues its visioning work, the Council and Personnel will work with the remaining staff to ensure operations continue in all areas. Although the transition period will require patience and flexibility, the focus remains on providing support to all ministries and ensuring the Presbytery's mission continues forward with strength and unity.

In the coming weeks, we will share more details regarding the search for interim leadership and the ongoing work of the Transition Team. We invite your prayers, ideas, and involvement as we navigate this transition together.

We are grateful for the leadership and dedication of Rev. Heckman during her time with us and look forward to the continued journey ahead.

JP Kastner

Moderator of Council  
Presbytery of Milwaukee

Report from the Bills and Overtures Committee:

Attached is a summary overview of the proposed amendments to the Book of Order from the 226th General Assembly. It is the recommendation of the Presbytery Bills and Overtures Committee that we approve the ratification of all of these amendments. The full text of the amendments with background and rationale is in the packet, and can also be found at: <https://www.pcusa.org/resource/proposed-amendments-constitution>.

We are presenting ten of these items (24-B and D-L) as an omnibus motion. However, our representatives to the General Assembly will be presenting some information about 24-A and 24-C, and those amendments will be presented individually for a vote. Stated Clerk Christian Boyd will be presenting some additional information on 24-M and we will also be voting individually on that item.

The Rev. Cecelia Armstrong & Rev. Tony Larson, Co-Moderators of the 226th General Assembly (2024) of the Presbyterian Church (U.S.A.) recorded greetings for mid councils as you prepare to take up and begin to discern the General Assembly amendments that were approved and recommended to the presbyteries. You may view the video [here](#).

To view short videos that address each item of business individually, [go here](#).

Grace and Peace,

Rev. Kim Trimboli  
Moderator, Bills and Overtures Committee

BOOK OF ORDER AMENDMENTS RECOMMENDED BY THE 226<sup>TH</sup> GENERAL ASSEMBLY  
AND PRESENTED TO PRESBYTERIES FOR THEIR AFFIRMATIVE OR NEGATIVE VOTE

**SUMMARY**

(Full text is available with meeting papers and at  
<https://www.pcusa.org/resource/proposed-amendments-constitution>)

AMENDMENT NUMBER	BOO SECTION TO BE AMENDED	SUMMARY
24-A	F-1.0403	The categories <i>gender identity, sexual orientation</i> , be included as protected classes in the Unity in Diversity section of Foundations of Presbyterian Polity
24-B*	G-1.0104	Adds guidelines for other forms of corporate witness (New Worshiping Communities, Immigrant Fellowships etc.) within an adaptable framework rooted in Reformed polity.
24-C	G-2.0104b	Adds Historic Principles of Church Order (F-3.01) and principles of participation and representation (F-1.0403) to required areas for examination for ordination.
24-D	G-2.0504b	Lengthens maximum terms of service for temporary pastoral relationships from twelve months to 36 months
24-E	G-2.0504b	Prohibits non-disclosure agreements at the end of a temporary pastoral relationship
24-F	G-2.0601	Confidential details about a candidate for ministry should be omitted in communicating to the presbytery the need for the approval of alternate means to determine readiness for ministry in areas usually covered by ordination exams
24-G	G-0901	Prohibits non-disclosure agreements when an installed pastoral relationship is dissolved
24-H	G-3-0106	Adds <i>and adults with vulnerabilities</i> to the required child and youth protection policy
24-I	G-3.0302d	Eliminates the need for a concurrence from another presbytery to have business brought before GA (concurrences are still allowed but not required)
24-J	G-3.0501	Revises the formula for determining the number of commissioners presbyteries are to send to GA
24-K	D-7.0501	Makes explicit that, when an allegation of offense is made to a clerk of session or stated clerk, the mandates to report to civil authorities in G-4.0302 must be followed
24-L	D-7.0902b	Mandates that administrative leave be paid
24-M		Episcopal-Presbyterian Agreement on Local Sharing of Ministries

**Disaster Preparedness and Response Task Force  
Report to Presbytery of Milwaukee  
February 22, 2025**

The DP&R Task Force met on Wednesday, January 8, 22, and 30 to establish goals for 2025, secure plans for a Church Security and Safety Training event and to begin developing a Disaster Preparedness and Response Plan for the presbytery.

DP&R goals for 2025 include the following:

- Create a Disaster Preparedness Plan for the Presbytery of Milwaukee
- Host a Church Security and Safety Training event
- Encourage and assist congregations to complete the annual Disaster Preparedness Assessment and select one or two items to work on in 2025.
- Support congregations in developing disaster preparedness plans and encourage those with existing plans to review them and make necessary revisions.

Church Security and Safety Training

**The Church Security and Safety Training is scheduled for March 22<sup>nd</sup>, 9AM-4PM at Wauwatosa Presbyterian Church.** On Monday, January 13<sup>th</sup>, DP&R task force members met with Mark McCain, PDA team lead; Cindy Thomas, Wauwatosa PC office manager; and Lisa Heckman to determine space and equipment needs, and address other details. See attached promotional flyer. All congregations are encouraged to have representation at this training.

Content of this training will include:

- Risk of armed intruders at faith-based institutions
- Identifying security risks
- Security role of ushers and greeters
- ALICE Training Institute strategies and drills for surviving violent intruder situation
- Preventing mass shootings with threat assessments and mental health counseling
- Basics of “Stop the Bleed” first aid training
- Creating a preparedness plan including church security

Disaster Preparedness and Response Plan for the Presbytery

The DP&R Task Force is currently working on developing a disaster preparedness and response plan for the presbytery.

Task force members continue to be available to assist church leadership with disaster preparedness. Don't hesitate to reach out to us for assistance!

Respectfully submitted,  
Marilyn Stone

DP&R Task Force Members:

Ben Neal – [beneal@hotmail.com](mailto:beneal@hotmail.com)

Catherine Neal – [servantcatherine@hotmail.com](mailto:servantcatherine@hotmail.com)

Laurie VanderJagt – [laurie.vanderjagt@gmail.com](mailto:laurie.vanderjagt@gmail.com)

Marilyn Stone, chair – [mmstone52@att.net](mailto:mmstone52@att.net)

# CHURCH SECURITY AND SAFETY TRAINING

**SATURDAY, MARCH 22, 9:00 AM-4:00 PM**  
**WAUWATOSA PRESBYTERIAN CHURCH, 2366 N 80TH ST., WAUWATOSA**

**LED BY PRESBYTERIAN DISASTER ASSISTANCE TRAINERS**  
**Mark McCain, Ron Botrell, Rev. Cully Cullpepper**

**Sponsored by Presbytery of Milwaukee**  
**Disaster Preparedness & Response Task Force**

Being prepared is one of the most important steps we can take in making our churches safe and hospitable places for everyone.

## Church security and safety training will include:

- Risk of armed intruders at faith-based institutions
- Identifying security risks
- Security role of ushers and greeters
- ALICE Training Institute strategies and drills for surviving violent intruder situations
- Preventing mass shootings with threat assessments and mental health counseling
- Basics of “Stop the Bleed” first aid training
- Creating a preparedness plan including church security

**Saturday, March 22<sup>nd</sup>**  
**9:00 AM - 4:00 PM**

**Wauwatosa Presbyterian**  
**2366 N. 80<sup>th</sup> Street**  
**Wauwatosa, WI**

**REGISTER BY MARCH 14TH**  
**Using the following link:**  
<https://presbyteryofmilwaukee.breezechms.com/form/05c35f>

**LUNCH COST: \$11; Gluten Free: \$15 (payable online or at door)**

## WHO SHOULD ATTEND?

We recommend sending 2 or more people per congregation. This training is ideal for people who work on or with the church building including ushers, greeters, church staff, elders, deacons, custodians, and committee members.

## WHO IS LEADING THE TRAINING?

Led by Presbyterian Disaster Assistance

**QUESTIONS?** Contact Marilyn Stone at 262-492-7921 or [mmstone52@att.net](mailto:mmstone52@att.net)



Committee on Local Arrangements (COLA)  
Presbytery of Milwaukee  
February 22, 2025

In November most of the committee met with representatives from GA including Rev. Oh. They shared a lot of information with the team and answered questions we had.

We met again in January to organize ourselves and have formed six sub-teams to begin to do our work:

- Volunteer Coordination
- Welcoming
- Sunday Morning Worship
- Special Events
- Media and Communications
- Communion Ware

While we are not responsible for planning the meeting, there is still a significant amount of work which we are responsible for.

It is our intention to spread the work out so it will not be a significant burden on any individual, but of course to accomplish that we will need “many hands”. So I encourage you to reach out and see where you can engage. I also encourage you to encourage church members to get involved in this once a generation opportunity to welcome our PC(USA) siblings to Milwaukee!

- Lee Tan  
Chair, COLA

*Report of the Nominating Committee  
For the February 22, 2025 Meeting of the Presbytery of Milwaukee*

The Nominating Committee presents the following slate of candidates for consideration by the presbytery:

VICE MODERATOR

Christina Tompler

COMMISSION ON TRANSITIONAL MINISTRIES (CTM)

Tim Whitney

COUNCIL

Christina Tompler

FOUNDATION

Tom Taylor

PERMANENT JUDICIAL COMMISSION (PJC)

Lydia Spotswood

PRESBYTERY PLANNING COMMISSION

Lisa Lynne Kirkpatrick

ORDINATION EXAM READER

Sarah Walker-Cleaveland

GA COMMISSIONER

Andy Holmes

Respectfully submitted by  
Rev. Katie Ebel  
Moderator, Nominating Committee  
February 10, 2025

## **Commission on Congregational Vitality**

### **Presbytery Report**

**February 6, 2025**

The 2024 year was a busy and productive one for this Commission.

Throughout the year, members have been pleased to receive requests for grants for both leadership and vitality efforts from our member congregations. These grants have enabled our churches and pastors to explore opportunities in their communities, support member and leader growth, and build on community programs.

We were especially pleased to work with CPM to offer the Boundary Training Program in November. This informative discussion brought us together as we explored the importance of learning the ways in which we can safely and effectively serve our congregants.

Training and Commissioning for Elders to officiate the Lord's Supper allows our leaders to serve in this essential way. We are grateful to the Reverend Katie Ebel, who provides a meaningful and thorough experience for our Elders as they build their faith and skills to take this step. Two Elders have recently completed this training.

Our work toward a youth event has taken several turns, and will be postponed at this time as we explore options. Working with newer commission member Laurie Lyter Bright, who has brought new perspectives to our group, and with Elizabeth McCord, we have identified goals, and now work toward the structure and timing of an event.

'Building On' continues to be our mission. At the end of the year with remaining funds, we were able to approve several grants for ongoing efforts. Recipients included the Christ Church Ernest Glenn Toy Store, Tippecanoe's Divine Intervention, and support for the Kairos Ministry and San Jose Parish.

Congregational vitality continues to be an ever changing opportunity as we face challenging times. Leadership grants, vitality efforts, campership grants, and support in times where resources are stretched will energize us as we move through this New Year with hope and joy.

Serving with Gratitude. Seeking Peace.

**Personnel Committee Report**  
**Prepared for Presbytery Meeting on February 22, 2025**

Welcome to the newest members of the Personnel Committee:

- Jean Dow
- Judy Jaggard
- Terry Lyons

Jean Dow has agreed to serve as Moderator for the committee. We are grateful for their commitment to the Milwaukee Presbytery and willingness to serve in this way.

Moderators of Council have met with the Personnel Moderator upon receiving news of Rev. Lisa Heckman's decision to accept a new call. A letter was drafted to inform presbytery members of the news. The Personnel Committee continues to work closely with members of Staff, Finance, and Council to develop short term Presbytery Operations goals. The work of the Transitions Team will greatly influence long range planning and recommendations.

The Personnel Committee will begin its six month informal check in with Staff. This is an opportunity for us to learn what is going well and where opportunities exist for us to support annual goals. Have you worked alongside a member of our staff? Do you have an experience you'd like to share? Contact a member of the Personnel Committee with feedback related to our Presbytery Staff.

The following members are completing their terms with the Personnel Committee:

- Eddy Huffman
- Melanie Maddux
- Rob Ater
- Tracey Pomeroy

Thank you for your service to the Milwaukee Presbytery. We wish you well!

# **Report from the Commission on Pastoral Ministries**

*for the February 22 meeting of the Presbytery of Milwaukee*

prepared and submitted respectfully by CPM Moderator Teresa Larson

## **Members**

Teresa Larson (moderator), Andy Holmes (vice-moderator), Nancy Ponstein (clerk), Karen Hagan, Sue Hagy, Sara Miles, Brett Swanson, Sarah Walker Cleaveland, and Ann Gibbs, Associate for Ministry Vitality

## **Under Care**

Madeline Lannon (Faith Springs; MDiv from Princeton completed, May 2023) – Candidate, Certified Ready to Receive a Call

Morgan Edwards (Wauwatosa; MDiv from Princeton anticipated May 2025) – Candidate

Sara Zallar (Tippecanoe; MDiv from Western Seminary anticipated May 2025) - Candidate

Lance Jones (Good Shepherd Trinity; MDiv from McCormick completed May 2011) - Candidate

Gina Struensee (Grace, Beaver Dam; MDiv from Dubuque completed, May 2023) - Inquirer

J.P. Kastner (Calvary; MDiv from Louisville anticipated May 2027) - Inquirer

## **Work of the CPM**

CPM continued its annual consultations and check-in conversations with our Inquirers and Candidates under care. We met with Madeline Lannon in November and with Gina Struensee in December.

CPM held an Advent Pastor Worship/Luncheon at Stair Crest on December 12. The 15 in attendance enjoyed the fellowship and community of our Presbytery and the residents of Stair Crest. Special thanks to Nancy Ponstein for coordinating the meal.

The commission has discussed changes to the Ethical Conduct and Boundaries Policy that would develop a timeline for consequences of non-compliance. Proposed changes will be presented at the May meeting.

The commission will soon begin work with the seven Ministers at Large (MAL) to validate their ministries and integrate them into the life of the presbytery.

All installed ministers are reminded to submit their approved 2025 Terms of Call as soon as possible.

CPM extends its thanks to Rev. Karen Hagan, who has finished her term and is rolling off the commission. Thank you, Karen, for sharing your time, wisdom, and nurture with us!

## **Items for action**

None.

# Presbytery of Milwaukee

## Balance Sheet

As of January 31, 2025

	TOTAL		
	AS OF JAN 31, 2025	AS OF JAN 31, 2024 (PP)	CHANGE
<b>ASSETS</b>			
Current Assets			
Bank Accounts			
1001000 TriCity Checking -9774	131,244.39	221,975.02	-90,730.63
1001010 TriCity Checking -5201 (deleted)	0.00	29,875.57	-29,875.57
<b>Total Bank Accounts</b>	<b>\$131,244.39</b>	<b>\$251,850.59</b>	<b>\$ -120,606.20</b>
Accounts Receivable			
11000 Accounts Receivable	0.00	1,420.00	-1,420.00
<b>Total Accounts Receivable</b>	<b>\$0.00</b>	<b>\$1,420.00</b>	<b>\$ -1,420.00</b>
Other Current Assets			
1002095 Southminster Loan	0.00	-1,738.02	1,738.02
11500 Prepaid Insurance (deleted)	0.00	4,068.25	-4,068.25
<b>Total Other Current Assets</b>	<b>\$0.00</b>	<b>\$2,330.23</b>	<b>\$ -2,330.23</b>
<b>Total Current Assets</b>	<b>\$131,244.39</b>	<b>\$255,600.82</b>	<b>\$ -124,356.43</b>
<b>TOTAL ASSETS</b>	<b>\$131,244.39</b>	<b>\$255,600.82</b>	<b>\$ -124,356.43</b>
<b>LIABILITIES AND EQUITY</b>			
Liabilities			
Current Liabilities			
Other Current Liabilities			
1002010 Payroll Payable	0.00	25,068.16	-25,068.16
1002011 403B Deduction Payable	0.00	1,600.00	-1,600.00
1002020 Pass Through Accounts Payable (deleted)	0.00	0.00	0.00
1002044 Peace & Global Witness-PMA (deleted)	0.00	1,082.93	-1,082.93
<b>Total 1002020 Pass Through Accounts Payable (deleted)</b>	<b>0.00</b>	<b>1,082.93</b>	<b>-1,082.93</b>
<b>Total Other Current Liabilities</b>	<b>\$0.00</b>	<b>\$27,751.09</b>	<b>\$ -27,751.09</b>
<b>Total Current Liabilities</b>	<b>\$0.00</b>	<b>\$27,751.09</b>	<b>\$ -27,751.09</b>
<b>Total Liabilities</b>	<b>\$0.00</b>	<b>\$27,751.09</b>	<b>\$ -27,751.09</b>
Equity			
30000 Opening Balance Equity	0.00	-23,336.99	23,336.99

# Presbytery of Milwaukee

## Balance Sheet

As of January 31, 2025

	TOTAL		
	AS OF JAN 31, 2025	AS OF JAN 31, 2024 (PP)	CHANGE
31500 Special Funds	0.00	0.00	0.00
1009003 Vernon AC (deleted)	0.00	15,646.09	-15,646.09
1009004 First Horicon (deleted)	0.00	-555.06	555.06
1009005 First Waukesha Gift (deleted)	0.00	33,900.00	-33,900.00
1009007 Restricted Peacemaking/Walz (deleted)	0.00	19,976.67	-19,976.67
1009015 San Jose Fund (deleted)	0.00	-4,973.84	4,973.84
1009020 Restricted Welsh Presbytery (deleted)	0.00	-286.43	286.43
1009022 Restricted Emonds Educational Fund	884.48	512.88	371.60
1009025 CPM Towner Scholarship Fund (move to Fdtn)	1,311.00	-1,811.00	3,122.00
1009031 CCV Pby Matthew 25 Fund (deleted)	0.00	5,850.00	-5,850.00
1009037 Triennium Fund	1,570.00	1,570.00	0.00
1009041 CPM Sabbatical Support Fund	2,117.51	1,967.51	150.00
1009043 Kairos Collective Fund	49,735.64	38,463.71	11,271.93
1009045 CCV Worship Leadership Dev Fund	1,120.00	1,120.00	0.00
<b>Total 31500 Special Funds</b>	<b>56,738.63</b>	<b>111,380.53</b>	<b>-54,641.90</b>
32000 General Operating Fund	74,941.80	147,664.23	-72,722.43
Net Income	-436.04	-7,858.04	7,422.00
<b>Total Equity</b>	<b>\$131,244.39</b>	<b>\$227,849.73</b>	<b>\$ -96,605.34</b>
<b>TOTAL LIABILITIES AND EQUITY</b>	<b>\$131,244.39</b>	<b>\$255,600.82</b>	<b>\$ -124,356.43</b>

# Presbytery of Milwaukee

## Budget vs. Actuals: FY\_2024 - FY24 P&L

January 2025

	TOTAL			
	ACTUAL	BUDGET	REMAINING	% OF BUDGET
<b>Income</b>				
1004000 Per Capita				
1004005 Per Capita - Gross Received	17,802.00		-17,802.00	
1004010 Per Capita - GA Share Paid	-4,622.40		4,622.40	
1004015 Per Capita - Synod Share Paid	-2,399.38		2,399.38	
<b>Total 1004000 Per Capita</b>	<b>10,780.22</b>		<b>-10,780.22</b>	
1004025 Prior Year Per Capita	0.00		0.00	
1004100 PBY Shared Mission	6,292.50		-6,292.50	
1004200 Foundation Support				
1004201 Undesignated Foundation Support	13,993.00		-13,993.00	
<b>Total 1004200 Foundation Support</b>	<b>13,993.00</b>		<b>-13,993.00</b>	
1004300 Administrative Income				
1004310 Synod Administrative Support	833.34		-833.34	
1004320 Other Income	668.99		-668.99	
1004326 ELCA Support for Evangelista Position	1,163.00		-1,163.00	
<b>Total 1004300 Administrative Income</b>	<b>2,665.33</b>		<b>-2,665.33</b>	
1004900 Pass Thru Income				
1004931 Restricted Welsh Pres Fdtn Trust Income	149.65		-149.65	
1004932 Restricted Emond Pres Fdtn Trust Income	86.30		-86.30	
1004933 Restricted Peacemaking/Walz Income	201.83		-201.83	
1004941 PCUSA Special Offerings/PDA donations	3.00		-3.00	
1004990 Southminster Loan Payments received	287.17		-287.17	
<b>Total 1004900 Pass Thru Income</b>	<b>727.95</b>		<b>-727.95</b>	
Services	-62.50		62.50	
<b>Total Income</b>	<b>\$34,396.50</b>	<b>\$0.00</b>	<b>\$ -34,396.50</b>	<b>0.00%</b>
<b>GROSS PROFIT</b>	<b>\$34,396.50</b>	<b>\$0.00</b>	<b>\$ -34,396.50</b>	<b>0.00%</b>
<b>Expenses</b>				
1015000 Personnel Expense				
1015010 Executive Presbyter				
1015011 Exec Presbyter Salary	4,166.68		-4,166.68	
1015012 Exec Presbyter Benefits	2,199.72		-2,199.72	
1015014 Exec Presbyter Prof Exp	-35.72		35.72	
1015016 Pres Exec SECA Offset	510.00		-510.00	
1015017 Exec Presbyter Technology Stipend	75.00		-75.00	
1015018 Exec Presbyter Housing Allowance	2,500.00		-2,500.00	
<b>Total 1015010 Executive Presbyter</b>	<b>9,415.68</b>		<b>-9,415.68</b>	
1015020 Admin Assistant				
1015021 Admin Assistant Salary	3,466.68		-3,466.68	
1015022 Admin Assistant Benefits	1,486.38		-1,486.38	
1015026 Admin Assistant Tech. Stipend	75.00		-75.00	
<b>Total 1015020 Admin Assistant</b>	<b>5,028.06</b>		<b>-5,028.06</b>	
1015030 Assoc for Ministry Vitality				



# Presbytery of Milwaukee

## Budget vs. Actuals: FY\_2024 - FY24 P&L

January 2025

	TOTAL			
	ACTUAL	BUDGET	REMAINING	% OF BUDGET
1015031 Assoc Min Vitality Salary	4,447.50		-4,447.50	
1015032 Assoc Min Vitality Benefits	2,106.51		-2,106.51	
1015033 Assoc Min Vitality SECA Offset	435.84		-435.84	
1015036 Assoc Min Vitality Housing	1,250.00		-1,250.00	
1015037 Assoc. Min. Vit. Tech. Stipend	75.00		-75.00	
<b>Total 1015030 Assoc for Ministry Vitality</b>	<b>8,314.85</b>		<b>-8,314.85</b>	
1015060 Stated Clerk				
1015061 Stated Clerk Salary	1,050.00		-1,050.00	
1015065 Stated Clerk Technology Stipend	75.00		-75.00	
<b>Total 1015060 Stated Clerk</b>	<b>1,125.00</b>		<b>-1,125.00</b>	
1015080 Evangelista del Presbiterio				
1015081 Evangelista Salary	3,925.00		-3,925.00	
1015082 Evangelista Housing	916.68		-916.68	
1015083 Evangelista SECA Offset	370.42		-370.42	
1015084 Evangelista Benefits	-1,392.38		1,392.38	
1015085 Evangelista Con Ed	524.12		-524.12	
1015086 Evangelista Prof Exp	264.33		-264.33	
1015087 Visa Expenses	750.00		-750.00	
<b>Total 1015080 Evangelista del Presbiterio</b>	<b>5,358.17</b>		<b>-5,358.17</b>	
1015090 Payroll Expenses				
1015095 Social Security and Medicare Employer Expense	345.53		-345.53	
<b>Total 1015090 Payroll Expenses</b>	<b>345.53</b>		<b>-345.53</b>	
1015400 Treasurers				
1015402 Foundation Treasurer Expense	200.00		-200.00	
<b>Total 1015400 Treasurers</b>	<b>200.00</b>		<b>-200.00</b>	
<b>Total 1015000 Personnel Expense</b>	<b>29,787.29</b>		<b>-29,787.29</b>	
1025400 Administrative Expenses				
1025406 Bank Service Charges	15.00		-15.00	
1025430 Insurance Expense	1,580.25		-1,580.25	
<b>Total 1025400 Administrative Expenses</b>	<b>1,595.25</b>		<b>-1,595.25</b>	
1035500 Council Expenses				
1036015 Interfaith Conference	375.00		-375.00	
1036025 WI Council of Churches	375.00		-375.00	
1036028 Common Ground	375.00		-375.00	
1036030 Habitat for Humanity MKE	500.00		-500.00	
1036035 United Church Camps, Inc. (UCCI)	500.00		-500.00	
1036215 San Jose Monthly Support	900.00		-900.00	
<b>Total 1035500 Council Expenses</b>	<b>3,025.00</b>		<b>-3,025.00</b>	
1066200 Comm on Pastoral Ministries				
1066245 Des Fund Pastor Support	425.00		-425.00	
<b>Total 1066200 Comm on Pastoral Ministries</b>	<b>425.00</b>		<b>-425.00</b>	

# Presbytery of Milwaukee

## Budget vs. Actuals: FY\_2024 - FY24 P&L

January 2025

	TOTAL			
	ACTUAL	BUDGET	REMAINING	% OF BUDGET
<b>Total Expenses</b>	<b>\$34,832.54</b>	<b>\$0.00</b>	<b>\$ -34,832.54</b>	<b>0.00%</b>
NET OPERATING INCOME	\$ -436.04	\$0.00	\$436.04	0.00%
NET INCOME	\$ -436.04	\$0.00	\$436.04	0.00%

**Presbytery of Milwaukee Foundation, Inc.**  
**Secretary/Treasurer's Report**  
**January 31, 2025**

**Balance Sheet**

The Balance Sheet format has been modified. The asset account called Investments was divided into two accounts: - Equities and Alternatives account and a -Fixed Income and Preferred account. The definition of Alternatives includes Real Estate Investment Trusts (REITs). Percentage figures were added to the amounts.

The January 31, 2025 Balance Sheet shows that the total assets in the Foundation during 2025 increased \$30,079.36 from a December 31, 2024, balance of \$1,878,021.54 to a January 31, 2025, balance of \$1,908,100.90. Presbytery has currently committed \$127,007.86 of the Foundation assets in addition to a Foundation approved cash draw of \$13,993 per month during 2025. Both the Equities and Alternatives account and the Fixed Income and Preferred Account balances are greater than Investment Guideline Targets.

**Statement of Activity**

The Statement of Activity shows the Morgan Stanley Change in Value, Advisory Fees and transfers between the Foundation and Presbytery.

During January **2025**, the Morgan Stanley Change in Value, less Advisory Fees, increased by \$44,072.36 or 2.38%. The Year-to-date January 31, 2025, net decrease to the Foundation, other than Change in Value less Advisory Fees, was \$(13,993.00). The total YTD 2025 increase to the Foundation was \$30,079.36. January 2025 was a very good month when compared to January 2024.

During January **2024**, the Morgan Stanley Change in Value, less Advisory Fees, decreased by \$(1,190.56) or (.063%). The Year-to-date January 31, 2024, decrease to the Foundation, other than Change in Value less Advisory Fees was \$(23,055.00). The total YTD decrease to the Foundation was \$(24,245.56).

During January 2025 \$13,991 was transferred from the Foundation to Presbytery. Within the Foundation account \$35,000 was transferred from investments to Preferred Savings and available Cash.

Sincerely,

David L. Holle

Secretary/Treasurer

**PRESBYTERY OF MILWAUKEE FOUNDATION INC.**

**Balance Sheet**

<b>ASSETS</b>	<b>Dec. 31, 2024</b>	<b>Dec. 31, 2024</b>	<b>Jan. Change</b>	<b>Jan. 31, 2025</b>	<b>%</b>
Morgan Stanley Account					
Cash and Savings	\$ 86,244.12	\$ 86,244.12	\$ 16,526.86	\$ 102,770.98	5.45%
Equities and Alternatives	\$ 1,152,867.21	\$ 1,152,867.21	4,447.22	\$ 1,157,314.43	61.39%
Fixed Income & Preferred	615,934.81	615,934.81	9,105.28	625,040.09	33.16%
Total Morgan Stanley Acct.	\$ 1,855,046.14	\$ 1,855,046.14	\$ 30,079.36	\$ 1,885,125.50	100.00%
Loans Receivable					
- Southminster Church	\$ 22,975.40	\$ 22,975.40	\$ -	\$ 22,975.40	
<b>TOTAL ASSETS</b>	<b>\$ 1,878,021.54</b>	<b>\$ 1,878,021.54</b>	<b>\$ 30,079.36</b>	<b>\$ 1,908,100.90</b>	
<b>Funds</b>					
Congregational Vitality	\$ 28,734.06	\$ 28,734.06	\$ -	28,734.06	
San Jose Ministry Project Grants	16,726.82	16,726.82	-	16,726.82	
Supporting Pastors - CPM	26,984.49	26,984.49	-	26,984.49	
Towner Scholarships	9,546.67	9,546.67	-	9,546.67	
Vernon AC	15,646.09	15,646.09	-	15,646.09	
Peacemaking/Walz	23,519.73	23,519.73	-	23,519.73	
CCV Pby. Matthew 25 Fund	5,850.00	5,850.00	-	5,850.00	
Total Committed Funds - Designated by Presbytery	\$ 127,007.86	\$ 127,007.86	\$ -	\$ 127,007.86	
Uncommitted Funds	1,751,013.68	1,751,013.68	30,079.36	1,781,093.04	
<b>TOTAL FUNDS</b>	<b>\$ 1,878,021.54</b>	<b>\$ 1,878,021.54</b>	<b>\$ 30,079.36</b>	<b>\$ 1,908,100.90</b>	

**PRESBYTERY OF MILWAUKEE FOUNDATION INC.**

**Statement of Activity**

	<b>Year to Date Jan. 1 2025</b>	<b>Jan. Change</b>	<b>Year to Date Dec. 31, 2024</b>	
<b>Morgan Stanley</b>				
Morgan Stanley Change in Value	\$ -	\$ 45,927.89	\$ 45,927.89	2.48%
Morgan Stanley Advisory Fees	-	(1,855.53)	(1,855.53)	-0.10%
Morgan Stanley Change in Value and Fees as a percentage of beginning account total	\$ -	\$ 44,072.36	\$ 44,072.36	0.00%      2.38%      2.38%
<b>Cash Transfers, gifts and loan Adjustments</b>				
Presbytery Support	\$ -	\$ (13,993.00)	\$ (13,993.00)	
Southminster loan payment received or adjusted	-	-	\$ -	
Southminster loan balance reduced	-	-	\$ -	
Towner Scholarships grant from donor	-	-	\$ -	
Towner Scholarships grant to Presbytery	-	-	\$ -	
Pastoral Support Grants	-	-	\$ -	
Camp Scholarships from Uncommitted Funds	-	-	\$ -	
San Jose Ministry Project Grants	-	-	\$ -	
Congregational Vitality Fund	-	-	\$ -	
1009003 Vernon AC	-	-	\$ -	
1009007 Peacemaking/Walz	-	-	\$ -	
1009031 CCV Pby. Matthew 25 Fund	-	-	\$ -	
Increase (Decrease)	\$ -	\$ (13,993.00)	\$ (13,993.00)	
Net Change in Total Assets	\$ -	\$ 30,079.36	\$ 30,079.36	

Prepared on February 2, 2025 by David L. Holle  
Secretary/Treasurer Presbytery of Milwaukee Foundation Inc.  
Foundation Financials YTD January 31, 2025

**Morgan Stanley Reconciliation**

**PRESBYTERY OF MILWAUKEE FOUNDATION INC.**

**Balance Sheet**

**Morgan Stanley Account**

**ASSETS**

Morgan Stanley	Dec. 31, 2024	%	Dec. 31, 2024	%	Jan. 31, 2025	%	Feb. 28, 2025	%
- Cash & Savings	86,244.12	4.65%	86,244.12	4.65%	102,770.98	5.45%	-	
- Equities & Alternatives	1,152,867.21	62.15%	1,152,867.21	62.15%	1,157,314.43	61.39%	-	
- Fixed Income & Preferred	615,934.81	33.20%	615,934.81	33.20%	625,040.09	33.16%	-	
<b>Total Morgan Stanley Assets</b>	<b>\$ 1,855,046.14</b>	<b>100.00%</b>	<b>\$ 1,855,046.14</b>	<b>100.00%</b>	<b>\$ 1,885,125.50</b>	<b>100.00%</b>	<b>\$ -</b>	

  

	Total YTD	Jan. 31, 2025	%	Feb. 28, 2025	%	Total YTD	%
Morgan Stanley Change in Value - All Accounts	\$ -	\$ 45,927.89	2.48%	\$ -		\$ 45,927.89	2.48%
Morgan Stanley Advisory Fees	-	(1,855.53)	-0.10%	-		(1,855.53)	-0.10%
Change in Value Less Advisory Fees	-	44,072.36	2.38%	-		44,072.36	2.38%
Transfer to Presbytery for General Support	-	(13,993.00)		-		(13,993.00)	
Transfer from Presbytery for Southminster Loan	-	-		-		-	
Transfer to Presbytery for Towner Scholarships	-	-		-		-	
Transfer to Presbytery for Pastor Support	-	-		-		-	
Tfr to Presbytery for Camp Scholarships from Uncom. Funds	-	-		-		-	
San Jose Ministry Project Grants	-	-		-		-	
Congregational Vitality Fund	-	-		-		-	
1009003 Vernon AC	-	-		-		-	
1009007 Peacemaking/Walz	-	-		-		-	
1009031 CCV Pby. Matthew 25 Fund	-	-		-		-	
<b>Total Change to Morgan Stanley Accounts</b>	<b>\$ -</b>	<b>\$ 30,079.36</b>	<b>1.62%</b>	<b>\$ -</b>		<b>\$ 30,079.36</b>	<b>1.62%</b>
Check figure		\$ 30,079.36	ok			30,079.36	ok

**ASSET ALLOCATION Morgan Stanley**

	Dec. 31, 2024	%	Dec. 31, 2024	%	Jan. 31, 2025	%	Feb. 28, 2025	%
Cash in all accounts	\$ 86,244.12	4.65%	\$ 86,244.12	4.65%	\$ 102,770.98	5.45%	\$ -	
Equities	1,144,433.82	61.69%	1,144,433.82	61.69%	1,061,790.99	56.32%	-	
Fixed Income & Preferred	615,934.81	33.20%	615,934.81	33.20%	625,040.09	33.16%	-	
Alternatives	8,433.39	0.45%	8,433.39	0.45%	95,523.44	5.07%	-	
<b>Total Morgan Stanley Assets</b>	<b>\$ 1,855,046.14</b>	<b>100.00%</b>	<b>\$ 1,855,046.14</b>	<b>100.00%</b>	<b>\$ 1,885,125.50</b>	<b>100.00%</b>	<b>\$ -</b>	

Definition of "Change In Value" is the sum of realized and unrealized capital gains or losses, plus dividends, plus interest and accrued interest.

There are two accounts at Morgan Stanley - A Cash and Preferred Savings Account and a Cash and Investments Account.

These two accounts are consolidated in these reports and the reported cash is from both accounts.

Periodic cash transfers are made from Preferred Savings to Available Cash to fund cash transfers to Presbytery.

Asset Allocation: Targets - Cash 10%, Equities 60%, and Fixed Income 30% : Maximums - Cash 20%, Equities 75%, and Fixed Income 46%.

Real Estate Investment Trusts (REITs) are classified as an Alternative investment and an Equity.

By David L. Holle, February 2, 2025

Secretary/Treasurer

File name: Morgan Stanley Reconciliation January 31, 2025