



THE EPISCOPAL DIOCESE OF VIRGINIA

The 227th Annual Convention of the Diocese of Virginia

November 11-13, 2021, Crystal Gateway Marriott, Arlington, VA

Related Organizations Nomination Form

Nominee for:

Diocesan Missionary Society

Virginia Diocesan Homes

Trustees of the Funds

Bloomfield

Name William Randolph Taylor

Address 504 Park Hill, Charlottesville, VA 22902


E-mail wrtaylorch24@gmail.com Phone 434-249-8600

City/State/Zip Charlottesville, VA 22902

Church Name, Location St. Paul's Memorial Church at the University of Virginia, Charlottesville, VA

Has the nomination been endorsed by the Related Organization? YES: _____ NO: _____

Are you a confirmed adult communicant in good standing of an Episcopal Church in the Diocese of Virginia? YES: yes NO: _____

Your church's Clergy Signature: 

Additional information to be provided (please use a separate sheet to answer the following questions)

Professional/Educational Background:

Church Involvement – Local; Diocesan, National:

Pertinent skills you bring to this work:

Why do you wish to serve?

Signature  Date 6/23/21

PLEASE NOTE: Nomination forms must be received no later than the close of business on **Friday, September 10, 2021** in order to be reviewed by Annual Convention. Please send completed nomination forms to: Secretary of the Diocese, 110 W. Franklin Street, Richmond, VA 23220 Fax: 804-644-6928 E-mail: bmartin@thediocese.net

Professional/ Educational Background:

Please see the attached resume for a concise overview of my professional and educational background.

Church Involvement – Local, Diocesan, National:

My local church connections starts with my home parish, St. Paul's Memorial Church at UVA ("St. Paul's"), but also includes local Catholic and other local Episcopal parishes. Regarding St. Paul's, this is my eighth year as a member, fourth year on the finance committee, and first year as chair of the finance committee. Last December concluded four consecutive years on the vestry, a full three-year term and a one-year stub term. Regarding the local Catholic community, my wife is Catholic, so we completed both the Episcopal and Catholic pre-marriage counseling, our wedding [at St. Paul's] was co-officiated by Rev. Will Peyton and a Catholic deacon from my wife's church, and our infant daughter will be baptized later this year at the William & Mary Catholic church, my wife's collegiate parish. Regarding other local Episcopal parishes, my father is a former member of the Grace Episcopal Church Walker's Parish investment committee, and I was raised there as a Christmas and Easter Episcopalian. Professionally, I have financially advised local Presbyterian and Episcopalian parishes on managing their cash surplus and endowment funds.

I have two connections to the Diocese of Virginia ("DOV"). First, and most recently, I voted in the 2019 DOV convention as delegate from St. Paul's, learning about diocesan polity and procedure, and networking with other delegates and DOV administrators. My other connection to the DOV was as the assistant director of development at Christchurch School, one of the member of Church Schools in the DOV. As a Christchurch fundraiser, I was able to meet some of the Diocesan staff in Board of Governors meetings and Mayo House alumni phonations.

Nationally, I have one connection and one related hobby/ interest. My one connection is Meredith Jenkins, the Chief Investment Officer of Trinity Church Wall Street. When I was being groomed to be the new treasurer (i.e. the clergy and vestry referred to me as Treasurer-In-Waiting in 2020), I called Meredith and asked for ESG endowment management advice. I was pleasantly surprised to learn that Meredith was a former St. Paul's member while attending UVA. She and I are not particularly close but I feel comfortable calling her periodically and asking for additional guidance. My related hobby is that when my wife and I travel, whether it is internationally, nationally or locally, we always enjoy visiting old and beautiful churches of all denominations.

Pertinent skills you bring to this work:

There are many skills I bring to this work. I manage endowments as a financial advisor, so I understand portfolio management and client relationship management. I monitor and advise on church finances as a church treasurer, so I understand basic church accounting and revenue seasonality. I have significant volunteer leadership experience as a nonprofit board member, and completed the three-month Board Academy program hosted by Charlottesville's Center for Nonprofit Excellence (CNE), which made me a better and more knowledgeable board member. Finally, as a former collegiate athlete and high school lacrosse coach, I am good at working in groups and enjoy doing so!

Why do you wish to serve?

There are three reasons why I want to serve. First, I am intellectually interested in learning about endowment investing and institutional consultant relationship management, and know that exposure to the TOTF board, staff and consultant will teach me about those topics. Also, related to intellectual interests, I majored in religion in college, and thoroughly enjoy learning about church procedure and governance, so being part of a DOV related organization is exciting. Second, I am professionally curious on how to improve my professional endowment management practice and how to improve St. Paul's

endowment management efforts, and think that exposure to the TOTF policies and procedures will strengthen both. Finally, I would like to network with Episcopalians at a regional level (i.e. outside of the local Charlottesville-Albermarle community), and I am hoping to add one or two non-profit volunteer leadership roles to my local board commitments.

William Randolph Taylor

504 Park Hill, Charlottesville, VA 22902 * (434) 249-8600 * WRTaylorCH24@Gmail.com

WORK EXPERIENCE

Truist Investment Services (Formerly BB&T Scott & Stringfellow) Charlottesville, VA
Vice President & Financial Advisor July 2013 - Present

- Guiding clients through life's financial opportunities and challenges, and co-managing \$400+MM in assets as partner of 5-personal financial planning and advisory team
- Leveraging technology, strategy and operations rigor to grow revenues 38% per annum while managing team's Internship program and volunteering as chapter co-head of LGBTQ and allies affinity group

Christchurch School Christchurch, VA
Assistant Director of Development, Coach, Teacher and Dorm Parent January 2012 - June 2013

- Assisted Head of School and Director of Development in raising over \$3.5MM in restricted and unrestricted funds in Fiscal Year 2013 and setting multiple single-year fundraising records for school
- Supported varsity boys' basketball coaching staff as head strength coach and varsity boys' lacrosse coaching staff as head assistant coach and head strength coach, while teaching senior math elective, Business Management and Strategy, and mentoring 35 young men on dormitory hall

Frisch Capital Partners, LLC Athens, GA & Atlanta, GA
Investment Banking Analyst August 2009 - December 2011

- Originated, structured and executed debt and equity private placements for middle-market leveraged buyouts, M&A and recapitalizations for clients in various sectors throughout North America
- Designed and managed undergraduate internship program, selecting and managing teams of 2 - 3 interns

CURRENT LEADERSHIP ROLES

Alumni Ambassador, VCU School of Business, Richmond, VA 2021 - Present
Treasurer, St. Paul's Memorial Church at UVA, Charlottesville, VA 2021 - Present
Finance Committee Member, St. Paul's Memorial Church at UVA, Charlottesville, VA 2017 - Present
Class Agent, Suffield Academy, Suffield, CT 2004 - Present

EDUCATION

Virginia Commonwealth University School of Business, Richmond, VA May 2020
Executive MBA, Concentration in Healthcare Management
Center for Nonprofit Excellence, Charlottesville, VA May 2018
Board Academy
University of Virginia, McIntire School of Commerce, Charlottesville, VA June 2009
McIntire Business Institute
Hampden-Sydney College, Hampden-Sydney, VA December 2008
Bachelor of Arts in Religion; Leadership Scholarship Recipient; NCAA Division III Lacrosse & Football Teams

PERSONAL

Technical Skills: Microsoft Office
Professional Certifications: FINRA Series 7; FINRA Series 66; Life, Health & Annuities License
Community Involvement: Class of 2014, Leadership Charlottesville; Former Assistant Coach, Boys' Junior Varsity & Varsity Lacrosse Team, St. Anne's-Belfield School; Former Member, Council of Alumni, Suffield Academy; Former Member, Finance Committee, Live Arts; Former Board President, Piedmont Council for the Arts; Founder & Former Chairman, Southeast Albemarle Lacrosse; Former Vestryman, St. Paul's Memorial Church