



## Mary Brunson

Vice President, AIF®

Index Fund Advisors & Investing for Catholics

Mary Brunson is a Vice President and Wealth Advisor (Series 65) at Index Fund Advisors, Inc. as well as Investing for Catholics, a division of Index Fund Advisors, Inc. She is an Accredited Investment Fiduciary (AIF), co-creator of Investing for Catholics, and considered a respected speaker, author and authority on developing sound investment policy for prudent investing.

Mary has a particular expertise in faith-consistent investing rooted in financial science, providing fiduciary advice and institutional wealth services to religious orders including Archdioceses, dioceses, endowments and foundations. In addition, Mary works with non-religious public trusts, pension plans and individuals.

Mary is the co-author of *Tending the Flock: Shepherding Catholic Retirement Plans*, and author of numerous articles and papers, including papers co-authored with IFA President Mark Hebner and Nobel Prize Winner in Economics, Harry Markowitz, titled "Can You Do Well While Doing Good?" and "Does Portfolio Theory Work During Financial Crises?"

Mary is a board member for the Magis Institute, spearheaded by Father Robert J. Spitzer, S.J. She is also the former National Chair of the Spirituality Commission for the National Council of Catholic Women (NCCW), as well as a member of the Board of Trustees for Catholic Charities of Orange County, and a member of its finance and investment committee. Mary is a graduate of University of California, Irvine.

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## About IFA

Founded in 1999, Index Fund Advisors, Inc. is a fee-only advisory and wealth management firm that provides risk-appropriate, returns-optimized, globally-diversified and tax-managed investment strategies with a fiduciary standard of care. The value of IFA extends beyond investment advice. As a holistic financial partner, IFA helps guide investors through all life and retirement stages. Our Wealth Advisors take a personalized approach to matching people with portfolios while providing a full-range of wealth services.