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Mission Statement of the Archdiocese of Milwaukee:

To proclaim the Gospel of Jesus Christ through his saving death and resurrection by calling, forming and sending disciples to go and make new disciples. As a people, we are called to encounter Jesus and grow as disciples through the sacramental life of the Church.

Parish Communication Workshop Tuesday, October 14th

Hello! My name is Kelsey DeMarais and I'm excited to be the director of external communication for the archdiocese! Part of my focus is to be a resource to parishes especially as it relates to their communication strategies.

Please stay tuned for future newsletters and **Save the Date** for the first Parish Communication Workshop being planned for Tuesday, October 14. The day will be designed for parish staff or dedicated volunteers who are responsible for all things related to communications related (bulletin, website, social media, etc.).

Please reach out to Kelsey at demaraisk@archmil.org with questions and suggestions.



Open Enrollment for the 2026 Plan Year Begins November 3!

Open enrollment is **November 3 thru 17, 2025** (more information to follow).

Please ensure that all your employees are entered in MyEnroll.com, and that your benefits eligible employees have a verified email address in the platform. To see who among your benefits-eligible staff does not have an email address or has not verified their email address, go to Menus, then Reports, then click on Census Report with Pending Emails.

Benefits eligible employees work 20-29 hours or 30+ hours per week.

Note (& this is important!): Insurance premiums for employees working 20-29 hours are NOT employer subsidized. Medical insurance premiums for employees working 30+ hours a week are employer subsidized. Accident Protection, Hospital Indemnity, Critical Illness and Short-Term Disability (for EEs working 30+ hours) are 100% employee paid for all benefits-eligible employees. Please be sure your employees understand this.

Please register for the **October 15th** webinar listed on page 3 to learn more about the 2026 open enrollment process.

Signatories on Bank and Investment Accounts

In the State of Wisconsin, the authority for bank and investment account signatories follows both canon law and Wisconsin civil law under statute [187.19](#). Under Wisconsin civil law [§187.19 Roman Catholic church](#), each parish is incorporated as a nonprofit religious corporate with a board of directors, including the diocesan bishop, the vicar general, the pastor, and two lay trustees. Furthermore, c. 532 states, “*In all juridic affairs the pastor represents the parish according to the norm of law. He is to take care that the goods of the parish are administered according to the norm of cc. 1281-1288.*”

Corporate roles within a parish include:

Role	WI Civil Law Status	Canon Law Status
Bishop	President of corporation; board member	No regular parish signatory role, but holds oversight authority
Vicar General	Board member; may act in bishop’s stead	Support / oversight
Pastor/ Parish Administrator / Parish Director	Vice President; primary authority over funds	Canonically, main administrator and signatory
Lay Trustees	Treasurer and secretary, selected by congregation; serve as officers	May serve according to bylaws; must act within legal authority

The pastor and the two lay trustees have signatory authority over parish bank and investment accounts. No parish staff or business manager may sign without explicit canonical and civil authorization.

Section 125 Cafeteria Plan

A Section 125 plan, also known a cafeteria plan, is authorized by the IRS under Section 125 of Internal Revenue Code. A cafeteria plan allows employees to pay for their share of the health insurance premiums or to contribute to HSAs or FSAs (if applicable) with pre-tax dollars. This reduces both federal income and payroll taxes for employees **and** reduces payroll tax liabilities for employers.

The types of benefits that may be included are:

- Health insurance premiums (e.g., medical, dental, vision)
- Flexible Spending Accounts (FSAs) for healthcare expenses
- Dependent Care FSAs for child or elder care costs
- Health Savings Accounts (HSAs)
- Group life insurance, up to \$50,000

Premium Only Plans (POPs) are a subset of Section 125 plans. These plans allow similar benefits for certain group insurance premiums (medical, vision, dental, accident, life, and disability), but typically do not cover FSAs, HSAs, dependent care, etc. The Section 125 plan offers greater coverage compared to a POP. Some POPs have add-ons that will cover FSAs and HSAs.

For more information: [FAQs for government entities regarding cafeteria plans | Internal Revenue Service](#)

Note: If a parish/school does not have a Section 125 plan or a POP, it must deduct premiums post-tax.

To establish a Section 125 Plan or POP, reach out to your payroll vendor or to a third-party administrator such as [Diversified Benefits Services](#) for information and assistance.

Priest Professional Expenses

As ordained ministers, the IRS offers a number of tax savings opportunities to priests. To take advantage of these tax savings opportunities, however, requires priests to follow documentation guidelines.

Priests are reminded to work with their parish business managers to ensure proper documentation is submitted.

Reminders:

- 1) Submit receipts for expenses within one month of incurring the expense.

Tip: A best practice is to submit expenses monthly.

- 2) Restaurant receipts require that the names of the people participating in the meal are listed, along with the business purpose. Receipts should be itemized, showing what was purchased (a credit card receipt is not adequate support).

- 3) The mileage tracking log should include the date of each trip, starting point and destination, business purpose of the trip, and total miles per trip (or odometer readings).

- 4) If expenses are not substantiated, any reimbursements could be taxable.

List of allowable professional expenses:

<https://www.archmil.org/ArchMil/Resources/ParFin/PriestComp/Allowable-Professional-Expenses-with-Explanations-12-1-17.pdf>

Professional expense tracking workbook:

<https://www.archmil.org/ArchMil/Resources/ParFin/ProfessionalExpenseReimbursementTrackingFY2025-26v02.xlsx>

Note: the parish needs to reconcile submitted receipts to the remaining professional expense allowance using a workbook such as the one linked above. Many priests are now tracking expenses using software, such as Expensify. Please work with your parish business manager to ensure data may be shared between the software and the parish for record keeping.

Faithful Finances: Priest Compensation; Online training video:

<https://www.youtube.com/watch?v=jYb7762dsRY>

If you have any questions, please contact Parish & School Financial Consulting at parishfinance@archmil.org.

Upcoming Microsoft Teams Webinars

The following training opportunities will be offered by Microsoft Teams Webinars over the next few months.

Registration is required to attend. Please click on a date below to register.

United Heartland Workers' Compensation Insurance, featuring Dan Follmer, Senior Loss Control Specialist (60 min):

[Wednesday, September 24, 2025](#)

2026 Benefit Open Enrollment Webinar, featuring Maureen Wurster, Benefits Administrator (90 min):

[Wednesday, October 15, 2025](#)

Behind the Review: Common Themes in Parish Financial Reviews, featuring PSF Staff (60 min):

[Tuesday, November 11, 2025](#)

Recorded training sessions and presentations, if available, may be viewed here:

<https://www.archmil.org/offices/parish-school-financial-consulting/training.htm>

Authorization to Sign Contracts

The pastor / parish administrator / parish director is the canonical administrator of the parish, and he is entrusted with the administration of the parish's temporal goods (Can. 1281 §1).

As such, at the parish, he is the only person authorized to sign legally binding contracts (Can. 1290). He may not delegate this authority to associate pastors, business managers, trustees, council members, etc.

Only trustees and the pastor / parish administrator / parish director may sign checks. Associate pastors may not sign checks.

For further information, please contact chancery@archmil.org.

Tips & Tricks for MyEnroll.com

Tip 1:

If you are the benefits administrator at your location, you need administrator access to MyEnroll.com. To request this, please send your complete contact information to Service@MyEnroll.com and copy Maureen Wurster at wursterm@archmil.org. Full contact information includes name, title, email, phone number, and physical address. If you are the billing contact, please indicate that as well. Also indicate if you are replacing someone in one or both roles (administrator and billing contact).

Note: there can be several administrators for MyEnroll.com, but only one billing contact.

The administrator is responsible for adding/transferring/terminating employees in MyEnroll.com, and for ensuring that all employee data in the platform is correct. The data in MyEnroll.com is what feeds over to our insurance carriers, so keeping it current is extremely important.

Tip 2:

Remember to transfer employees if they are moving to a different parish/school. That way, their benefits remain intact. A transfer opens an opportunity for the employee to make changes to his/her benefits. However, an enrollment window does not open. To manually update the benefits for your new employee, go to their profile in MyEnroll.com, click on Menus, Employees, Manage Benefits Plans, and then Change next to the benefit they want to change, and enter the effective date of the transfer/their hire date at your location. Once completed, click F5 to refresh the screen and the updated payroll deductions will appear.

To track employee benefits changes, it is prudent to download the Coverage Change Report at least monthly. To do so, go to Menus, Reports, then Coverage Change Report and enter the Plan Year (i.e., 2025) and the Change-From Date. Once the report appears, you may export it to a Word, Excel, PDF or CSV format by clicking on the desired icon in the upper left corner of the report.

Recruiting Opportunity for Parishes and Schools!

The Associate Director of Recruiting at the Archdiocese of Milwaukee, [Jackie Luther](#), will be attending career fairs in September and October and will promote parish and school job openings.

If you would like to share a short message about why your parish or school is a great place to work, she will share this information with prospective candidates. Examples might be something about your unique culture, photos, testimonials, etc.

You can reach Jackie Luther via email: jluther@archmil.org or call 414-769-3470.

Loose Change: Guidance for Collections [PFMM 5.6.1](#)

Loose cash and envelopes must be collected by ushers during the Mass and must be taken immediately to a secure location.

If the collection basket is placed at the altar as part of a presentation of gifts at the Offertory, **two** individuals must be assigned to remove this basket after the distribution of communion and take the basket to the secure location.

The collection may be counted immediately following the mass, or it may be counted on the first workday after the weekend. The entire unsorted collection must be placed in serially numbered tamper evident bags and stored in a locked, fireproof safe, or placed in the bank night depository, until it is counted. The collection must remain in view of at least **two** individuals at all times. A tracking log must be used to document the chain of custody of the tamper evident bags until it is counted.

Stipends & Stole Fees

Within the Archdiocese of Milwaukee, as part of his compensation package as a priest, each priest makes an annual election to keep the stipends for his services for Masses offered, confessions heard, and any other services offered to a parish or school, or to turn those stipend payments over to their employer (the parish, St. Francis de Sales Seminary, Archdiocese Central Office, etc.). This election is stated in the [Priest Compensation Workbook](#). Because of this election, it is important that the parish paying the help-out fees confirm to whom the stipend check should be made payable.

Note: Mileage reimbursements should always be reimbursed directly to clergy.

If the priest confirms that the stipend is to be paid to him personally, please include the stipend amount on the check with the mileage (note that the mileage is not 1099 reportable, but the stipend is 1099 reportable).

If the priest confirms that the stipend is to be paid to his employer, please print one check payable to that employer (including the priest's name on the memo line or the remit stub) and print one check for the mileage payable to the priest. Both checks may be mailed to the priest, or the stipend check may be mailed to the employer and the mileage check mailed to the priest. In these situations, the priest is responsible for ensuring the stipend check is given to his employer.

Following this process ensures that any Form 1099 issued to a diocesan priest is for the correct amount.

The same process should be followed for religious order priests, confirming if the stipend and/or the mileage is payable to the priest, the parish that pays his salary, or to his religious order before the payment is processed.

It is recommended that each priest works with the organization (parish/school/seminary/Archdiocese of Milwaukee central offices etc.) that pays his salary to create a letter that he may share when performing help-out services. For a template for this letter, please see the [Parish & School Resources Page](#) under the "Templates" column for *Priest Help-Out Letter*.

BAAM Meetings for 2025-26 Wednesdays, 8:30-11:30 AM

September 17th – In person, Our Lady of Lourdes Parish, Milwaukee
November 19th – Virtual
February 5th – Digital Discipleship, St. Leonard Parish, Muskego
March 18th – Retreat, St. John Neumann Parish, Waukesha
May 20th – In person, Our Lady of Lourdes, Milwaukee

Conflict of Interest

When was the last time your Employee Handbook was reviewed for its Conflict of Interest Policy?

The best practice is for all new employees and key volunteers, such as trustees, finance council members, and pastoral council members to acknowledge receiving the conflict of interest policy. The parish/school may also want to develop a form that employees in management and key volunteers fill out annually to disclose any conflicts of interest.

In our parishes, the most common conflict of interest exists when the parish or school hires a company owned by an employee/volunteer or his/her immediate family member. Another common conflict arises when a member of a trustee's family volunteers as an usher or money counter at the parish.

Disclosing this information allows the pastor and the trustees to determine how to proceed. In many cases, additional oversight for approving invoices, etc. is required. There may also be certain decisions that the employee or volunteer need to opt out voting on due to the conflict.

Find the Parish & School Policy Manual here: [Policies and Forms](#)
The *Conflict of Interest* notice may be found in section 4444 of the manual.

Do you handle HR/Finance/Facilities at your parish/school?

The Business Administrators of the Archdiocese of Milwaukee (BAAM) invites those who support Catholic parishes/schools to join.

To register or renew, please see: [Business Administrators Archdiocese of Milwaukee: About Us - How to Join BAAM](#)

BAAM's website:
<https://www.milwaukeebaam.org/>

Parish Financial Reviews

Areas Every Parish Finance Council Should Review

“Let all things be done decently and in order.” — 1 Corinthians 14:40

Addressing these areas proactively will enhance your parish’s financial health, ensure compliance, and prepare your operations for future changes. Utilize the linked resources and reach out to your Parish Financial Consultant for guidance and support.

1. Ensure Robust Bank Reconciliations and Oversight
Resource: [PFMM Section 5.5.3](#) – Bank Reconciliations and Controls
2. Standardize Chart of Accounts
Resource: [Modified Chart of Accounts](#) & Reporting Guidance
3. Proper Fund Accounting and Financial Reporting
Resource: [Fund Accounting Update](#)
4. Cash Receipts and Counting Procedures
Resource: [PFMM Section 5.7](#) – Cash Handling Procedures
5. Disbursement Controls and Credit Card Usage
Resource: [Credit Card Agreement Template](#)
6. Payroll Compliance and Benefit Oversight
Resource: [PFMM Section 5.11.5](#)
7. Clergy Compensation and Professional Expense Documentation
Resources: [Clergy Compensation Workbook](#), [Priest Professional Expense Workbook](#), [Allowable Expenses with Explanations](#), and [Shared Service Agreement Template](#)
8. Internal Controls and Access Management
Resource: [Internal Controls Questionnaire](#) & Best Practices (link to 2013 PFMM)

For additional resources and templates, visit:
[Archdiocese Parish & School Financial Consulting Resources](#)

Lay Initiative Upcoming Events Hold the Dates!

Desert Day*

Monday, November 3, 2025 @
Priests of the Sacred Heart Provincial
Offices (Franklin)

Or

Thursday, April 16, 2026 @
St. Norbert Abbey in De Pere, WI

Inspired by the life and ministry of St. John the Baptist, join us for a desert day to pause from the daily grind, unplug, and be rooted and sent.

*Both Desert Days (November 3 & April 16) will have *identical* programming. Please join us for whichever one best fits your schedule.

Advent Day of Reflection **Thursday, December 4, 2025**

AND

Lenten Day of Reflection **Thursday, March 12, 2026**

In collaboration with Dr. Dan Scholz and Marquette University, these days are intended for priests and their pastoral staffs, to come together and be renewed in spirit.

More details and registration information will be available soon. Registration will be posted here: [Continuing Formation Opportunities for Lay Ministers](#)

If you are not on the Lay Initiative mailing list and would like to be added, or if you have any questions about the above programs, please contact Meg Aspinwall at aspinwallm@archmil.org.

New Hire Reporting to the State of Wisconsin

If a parish or school processes its own payroll, for example, within QuickBooks, your parish/school is responsible for reporting new hires to the State of Wisconsin. If the parish/school does not, "Wisconsin New Hire Reporting Center" may contact the employer requesting that the reporting be completed.

If your parish or school uses a payroll processor, such as ADP, Paycor, Paychex, Gusto, etc., the payroll provider usually handles this type of reporting.

For more information, please see: [Home - Wisconsin New Hire Reporting Center](#)

Electronic Reporting: https://wi-newhire.com/electronic_reporting

[Frequently Asked Questions - Wisconsin New Hire Reporting Center](#)

Who must be reported?

Employers are required to report the following employees:

- *New employees:* Employers must report all employees who reside or work in the State of Wisconsin to whom the employer anticipates paying earnings. Employees should be reported even if they work only one day and are terminated (prior to the employer fulfilling the new hire reporting requirement).
- *Re-hires or Re-called employees:* Employers must report re-hires, or employees who return to work 60 days after being laid off, furloughed, separated, granted a leave without pay, or terminated from employment. Employers must also report any employee who remains on the payroll during a break in service or gap in pay, and then returns to work after 60 days. This includes teachers, seasonal workers, etc. Substitute teachers must be reported for the first day worked in each school year.
- *Temporary employees:* Temporary agencies are responsible for reporting any employee who they hire to report for an assignment.

Is anyone exempt from this law?

No one is exempt from this law.

Why do we need new hire reporting?

New hire reporting speeds up the child support income withholding order process, expedites collection of child support from parents who change jobs frequently, and quickly locates alleged non-custodial parents to help in establishing paternity and child support orders. New hire reporting helps children receive the support they deserve. New hire reporting also saves taxpayers by preventing fraud in welfare, workers compensation, and unemployment insurance. Employers are a key partner in ensuring financial stability for many children and families and should take pride in their role.

What information must I report?

Required Employer Information:

- Employer's Federal Employer Identification Number (FEIN). If you have more than one FEIN, please make certain you use the same FEIN you use to report your quarterly wage information when reporting new hires.
- Employer's Name
- Employer's Payroll Processing Address

Required Employee Information:

- Employee's Name (First, Middle, Last)
- Employee's Mailing Address
- Employee's Social Security Number (SSN)
- Employee's Date of Hire
- Employee's Date of Birth

Setting Goals for Your Team: A Practical & Faith-Filled Approach for Catholic Schools & Parishes

In Catholic schools and parishes, leadership means more than managing tasks—it means forming people in mission. Whether you're guiding teachers, ministry leaders, or volunteers, setting clear and meaningful goals is a powerful way to foster growth, accountability, and spiritual development.

Done well, goal-setting not only enhances performance but also strengthens your team's connection to Christ and the community they serve.

1. Start with Mission and Vision

Before setting individual goals, revisit your school's or parish's mission. What are you working toward as a community of faith? How do this year's priorities reflect your Gospel values and call to serve?

By grounding goals in your Catholic identity, you help team members see their work not just as a job, but as a vocation.

2. Make Goal-Setting a Collaborative and Prayerful Process

Effective goals are not imposed—they're discerned together. Invite employees or volunteers to reflect prayerfully on where they feel called to grow. Use this as an opportunity to listen, support, and affirm their unique gifts.

Consider questions like:

- “How is God calling you to grow in this role?”
- “What impact do you hope to make this year in our students' or parishioners' lives?”

Collaboration builds ownership. Prayer invites the Holy Spirit into your planning.

3. Use the SMART Framework—With Heart

Structure matters, even in ministry. Using SMART goals—**Specific, Measurable, Achievable, Relevant, and Time-bound**—helps make objectives clear and actionable. But in Catholic settings, “relevant” should also mean aligned with faith and mission.

Examples:

- *“Implement a monthly student service project that connects classroom learning to Catholic Social Teaching by May.”*
- *“Recruit and train three new altar servers by Christmas, including formation in the Mass.”*

4. Balance Excellence with Compassion

We are called to pursue excellence in our work, but we must do so with an awareness of each person's capacity and circumstances. Aim to challenge your staff to grow, while also supporting their wellbeing and spiritual life.

When goals are missed, respond with grace. Ask:

- *“What challenges got in the way?”*
- *“How can we adjust and try again together?”*

Continued on Page 9.

Setting Goals for Your Team, Continued.

5. Include Both Performance and Formation Goals

Help team members set goals that focus not just on output, but on **who they are becoming**.

For example:

- **Performance Goal:** “Increase family engagement by launching a new parent faith formation series by Lent.”
- **Formation Goal:** “Attend a diocesan retreat or complete a Catholic leadership training course this year.”

When people are encouraged to grow spiritually as well as professionally, it deepens both morale and mission alignment.

6. Check In Regularly and Pray Along the Way

Don’t let goals sit on a shelf. Schedule check-ins each quarter to review progress, offer support, and adjust if needed. Open your meetings with prayer, and reflect together on how the work is serving others and glorifying God.

This rhythm of reflection keeps the team grounded, connected, and focused on what really matters.

7. Celebrate Wins and Acknowledge Grace

Recognize and affirm achievements—both big and small. Celebrate new programs, improved outreach, and individual growth with sincere gratitude. And when things don’t go as planned, look for the hidden grace.

Ask:

- “Where did we see God at work, even in the challenges?”
- “What seeds were planted for the future?”

Celebration strengthens community and reminds everyone that their work has eternal value.

Final Thoughts: Growing Together in Mission

Goal-setting in Catholic schools and parishes is about more than results—it’s about forming teams that serve with clarity, compassion, and commitment to Christ. By blending practical tools with spiritual intention, you empower your staff and volunteers to grow in both purpose and faith.

When goals are set with care and prayer, they become a path not just to better outcomes, but to deeper discipleship.

Contact parishandschoolhr@archmil.org if you have questions about setting goals with your team.

Reminder: Missionary Cooperation Plan (MCP) 2025 Collections

Once the appeal concludes and all donations are received, the parish should deposit the funds and issue **one final check** to our office. Include **MCP** and the **group number** in the memo line.

Make the check payable to:

Society for the Propagation of the Faith

P.O. Box 070912

Milwaukee, WI 53207-0912

For more information, please see the June 2025 edition of [Administrative Insights](#).

FY 2024-25 Confidential Financial Statement (CFS) Workbook

The annual Confidential Financial Statement (CFS) is a group of financial documents prepared at the end of the fiscal year by all parishes and schools of the Archdiocese of Milwaukee. It includes the Archdiocesan Assessment form. Completion of these reports is mandatory.

The Excel workbook to be used for the 2024-25 CFS has been posted on the Parish & School Financial Consulting Resources website, under the "Templates" column:

[2025 Confidential Financial Statement \(CFS\)](#)

Due Dates:

- a. Parishes without a School enrolled in a School Choice Program: Monday, September 15, 2025.
- b. Parishes with a school and stand-alone schools enrolled in a School Choice Program (PSCP or SNSP): Friday, October 31, 2025.

Copies of the Financial Audit and Management Letter submitted to the Department of Public Instruction (DPI) for the October 15th deadline should be submitted as soon as they are available, but no later than October 31st. *Note: If this is the school's first year in School Choice and there is no financial audit, the parish should submit its CFS on September 15th.*

A parish that fails to submit a CFS to the Parish & School Financial Consulting Office by the due date could be subject to a 15% penalty in the calculation of its assessment. This penalty is in addition to the actual assessment calculation.

Submission Information:

1. Submit the completed workbook by email to: parishfinance@archmil.org.
2. In the subject line of the email, please include your parish or school three-digit code, name, city, and "2025 CFS." For example: "A99 St Adelina Milwaukee – 2025 CFS."
3. Include:
 - a. A completed CFS Excel workbook for your parish or school (Excel format).
 - b. A signed cover letter by your Pastor/administrator, trustees, and finance council chair. The CFS workbook contains a "Cover Letter" tab that should be printed after the CFS is filled out. This may be scanned as a PDF and included as an attachment.
 - c. A copy of the income statement for the year ended June 30, 2025.
 - d. A copy of the balance sheet as of June 30, 2025.
 - e. For Choice Schools (PSCP or SNSP), the 6/30/2025:
 1. FY 2024-25 School Choice Financial Audit report
 2. FY 2024-25 School Choice Management letter

Note: Choice Schools in the Private School Choice Program (PSCP) are required to submit the FY 2025-26 Fiscal and Internal Control Practices Report (FICPR) to parishfinance@archmil.org by December 31, 2025.

Training:

Online training materials, including a link to a video, are posted on the Parish Training page under "Faithful Finances: 2025 Confidential Financial Statement (CFS):" <https://www.archmil.org/offices/parish-school-financial-consulting/training.htm>

This notice is an excerpt from the July 9th, 2025 email sent to pastors, trustees, finance council chairs, and business managers. Please see original email for full instructions.

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Checks from the Archdiocese of Milwaukee

If your parish receives a check from the Archdiocese of Milwaukee and you have questions about it, please contact our Accounts Payable team at: accountspayable@archmil.org.

Check Issuing Guidelines

If you are submitting a check to the Archdiocese, please make certain that it is clear what the check is for, for example, by using the memo line of the check.

<https://www.archmil.org/ArchMil/Resources/ParFin/FYSA-Newsletters/CheckIssuingGuidelinesrev2023.04.01.pdf>