

# DR. MARTIN EDWARD LEE, D.MIN.

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## EDUCATION

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- Doctor of Ministry, Concordia Seminary, St. Louis** December 2021  
**Missional Leadership:** Organizational Stewardship  
**Major Applied Project (MAP):** *Gospel Impact and Stewardship Tool (GIST): Visual Mapping to Discover Gospel Imperatives for Strategic Ministry Decisions*
- Master of Divinity, Concordia Theological Seminary, Ft. Wayne** May 1997  
**Department of Practical Theology**  
Thesis: *Integrating Liturgy and Principles of Community Building*
- Bachelor of Arts, Concordia University, Ann Arbor** May 1992  
**Communications and Classical Languages** (Greek, Hebrew, Latin)

## SUMMARY OF PROFESSIONAL POSITIONS

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- LUTHERAN CHURCH – MISSOURI SYNOD<sup>i</sup>** **United States**  
Council of Presidents – Transitional Specialist, Pacific Palisades, CA February 2021 – Present  
Council of Presidents – Transitional Specialist, Lawrence, KS January 2020 – January 2021  
Council of Presidents – Transitional Specialist, Pittsburgh, PA December 2018 – December 2019  
Council of Presidents – Transitional Specialist, St. John's, MI June 2017 – November 2018  
Council of Presidents – Transitional Specialist, Westland, MI January 2016 – March 2017  
Council of Presidents – Transitional Specialist, Glen Burnie, MD July 2014 – November 2015  
Council of Presidents – Transitional Specialist, Kentwood, MI August 2012 – February 2014  
Council of Presidents – Transitional Specialist, Battle Creek, MI November 2010 – August 2012  
Pastor, Grace Lutheran Church, Leslie, MI November 2007 – October 2010  
Pastor, Trinity Lutheran Church, San Bernardino, CA January 2001 – December 2006  
Pastor, Trinity Lutheran Church, Montclair, CA August 1997 – September 2000
- CLASSICAL STEWARDSHIP INSTITUTE** **Mason, Michigan**  
Founder, Executive Director, and Chief Investment Officer September 9, 2002 - Present
- UBS PAINWEBBER** **Weehawken, NJ**  
Financial Advisor September 7, 1999 – September 9, 2002
- UNITED STATES NAVY** **Newport, RI**  
Commissioned Officer (Chaplain Reserves) February 27, 1995 – June 2001

## PROFESSIONAL EXPERIENCE

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### LUTHERAN CHURCH – MISSOURI SYNOD

*Council of Presidents – Transitional Specialist*

**United States**

November 1, 2010 – Present

#### **Major Accomplishments Overall:**

- Invited by five District Presidents to lead intentional change and transition process for eight culturally diverse communities across the United States, directly impacting over 4,000 staff, faculty, board, congregation, and school members (2010 – 2022)
- Created “Innovation Teams” to complete eight institution-wide strategic planning processes, including creating and meeting agreed-to measurements and benchmarks (2010 – 2022)
- Initiated a comprehensive study and planning process to achieve diversity goals (2020 – 2022)
- Developed four teams of high functioning senior staff (2010-12; 2014-15, 2016-17, and 2017-18)
- Recognized for 25 years of service, eleven churches in five Districts of the Lutheran Church–Missouri Synod (LCMS) (2022)
- Led shared governance training for over 200 administrative staff, faculty, and board members (2012-2022)
- Appointed to the Western Alliance thinktank assigned to envision the future of transitional ministry in three western districts of the LCMS (2021)
- Recognized by the Lutheran Transitional Ministry Association (LuTMA) Dean of Faculty as a leading transitional specialist in the country (2018)

#### **Academics:**

- Selected to join the LuTMA Faculty (2017)
- Contributed a chapter on the formation and employment of Transition Teams for the LuTMA training and credentialing curriculum (2021)
- Contributed a new chapter on the complementary use of Organizational Learning Theory with Systems Theory for the LuTMA training and credentialing curriculum (2021)
- Co-authored the online curriculum for LuTMA basic education training program (2019 – 2022)
- Developed a process map as a guide for transitional work which is in use by many transitional specialists (2019)
- Provided contributions to Interim Ministry Conference Quarterly Newsletter “Transition Times” (2017 – 2021)

#### **Administration:**

- Strengthened congregational relations and community reputation by successfully resolving church worker sexualized behavior misconduct accusation and legal liability ramifications in Michigan District; implemented a shared governance model to provide increased protection against blurred boundaries (2018)
- Resolved church worker financial misconduct accusation in Eastern District (2019)

- Led key employee succession plans in the Michigan, Southeastern, and Eastern Districts (2014, 2015, and 2018)
- Implemented a revised staffing configuration for three churches and reduction in force at three churches (2014 - 2017)
- Chaired the Interim Ministry Conference Board of Directors (2020)
- Participated as member and financial secretary on Interim Ministry Conference Board of Directors (2014 - 2020)

**Finance and Advancement:**

- Directed five first-time "Charity of Choice" 5k fundraisers, raising over \$60,000 (2012 - 2022)
- Completed fundraising and construction for church and school facilities, including offices, coffee shop and open space (2015)
- Secured no-gaps benefits plan coverage for transitional specialists (2020)
- Partnered with executive leadership and Kellogg benefit plan consultant to study and propose a 67-person benefit plan to improve employee relations and benefits and reduce expenses (2011)
- Trained senior leadership team in root cause analysis and cause mapping for diagnostic problem solving related to early learning center budget and employee hours (2017)
- Led the collaboration, design, and implementation of a shared-budget model between two churches and their partner schools (2011, 2015)

**CLASSICAL STEWARDSHIP INSTITUTE**

*Founder, Executive Director, and Chief Investment Officer*

**Mason, Michigan**

September 9, 2002 - Present

**Major Accomplishments Overall:**

- Leveraged **Voyant Financial** and **Crescendo Total Planned Giving** resources to allow for successful servicing and asset gathering of \$52.7 million in advisory assets and \$10.1 million in assets under management as of December 2021 (2016-2021)
- Defined Classical Stewardship Institute's core value as helping private clients and nonprofit organizations achieve strategic goals through deployment of resources for both programmatic impact and financial sustainability, a dual bottom line (2021)
- Created a consulting tool to assist nonprofits in identifying true costs and programmatic impact for achieving strategic imperatives (2021)
- Formed a fixed income and equity securities portfolio management team (2021)
- Surpassed Classical Stewardship Institute's goals for strategic and charitable impact by offering increased year-over-year asset management, financial planning, and consulting services for free to 501(c)(3) charitable organizations (2016 - 2022)

**Operations:**

- Developed and launched a 2-Year Financial Advisor Trainee and Internship program (2021)
- Completed registration of Classical Stewardship Institute as a Registered Investment Advisory (RIA) firm with the states of California and Michigan (2016)

- Partnered with **Charles Schwab-TD Ameritrade** with over \$8 trillion assets under management as of January 2022 (2016 - Present)
- Partnered with **LPL Financial** with \$5.9 billion in revenue in 2020, and over \$1.1 trillion in advisory and brokerage assets as of August 2022 (2002 - 2007; 2013 - 2016)
- Completed registration of Classical Stewardship Institute with Securities Exchange Commission (SEC) in the Electronic Data, Gathering, Analysis and Retrieval (EDGAR) System (2018)
- Developed a comprehensive online library to provide stewardship resources to leaders in nonprofit organizations on finance, staffing, and governance (2020)

**Asset Gathering and Partnerships:**

- Gathered \$10.1 million in fee-based assets under management (2016 - 2022)
- Provided estate and financial planning services to \$52.7 million (2016 - 2022)
- Recruited and trained thirteen financial advisors (2002 - 2022)
- Established partnerships with financial professionals increasing annual revenue by 157% (2006 - 2007)

**TRINITY LUTHERAN CHURCH**

*Pastor*

**San Bernardino, CA**

January 2001 - December 2006

**Major Accomplishments Overall:**

- Supervised the training and onboarding of the next settled pastor (2004-2006)
- Collaborated with Latino ministry to combine resources and activity to revision ministry together (2003)
- Facilitated annual community outreach programs to provide education, recreation, and family support to underserved community (2003 - 2006)
- Delivered revitalization resources to the leadership in marketing and expanding missional reach (2002)

**UBS PAINWEBBER**

*Financial Advisor*

**Weehawken, NJ**

September 7, 1999 - September 9, 2002

**Major Accomplishments Overall:**

- Negotiated a partnership managing over \$40 million (2000)
- Ranked 12<sup>th</sup> nationally in a class of 135 financial advisors based on accumulated assets and revenue (2000)
- Exceeded the \$16 million level one assets gathered by year two goal (2001)
- Achieved level one classification by gathering over \$7 million assets in year one goal (2000)
- Raised \$2 million for an AIG fixed income offering enabling the branch office to achieve a monthly production record (2001)
- Completed the UBS PaineWebber Foundations Forum, a 2-year financial advisory training program (2002)

**Select Recognition and Awards:**

- Invited to form a partnership with over \$100 million (2001)

- Recruited by Salomon Smith Barney/Citibank with a nearly \$200,000 sign on bonus (2002)
- Invited to participate in the UBS PaineWebber Master Asset Management training program in Pasadena, CA (2001)
- Invited to participate in advanced financial and estate planning at Pacific Life headquarters in Los Angeles, CA (2001)
- Invited to participate in advance wealth management training at the Hartford headquarters in Hartford, CT (2000)

**TRINITY LUTHERAN CHURCH**

*Pastor*

**Montclair, CA**

August 1997 – September 2002

**Major Accomplishments Overall:**

- Led congregation through a self- and feasibility-study process to prepare and implement a revitalization project (1999)
- Initiated a building use partnership with a third party to increase annual revenue by 32% (1999)
- Strengthened the focus on strategic and creative staffing opportunities to achieve financial sustainability (1999)
- Completed a playground building project and enhanced the facilities for a much-needed public community space (1998)

**UNITED STATES NAVY**

*Commissioned Officer (Chaplain Reserves)*

**Newport, RI**

February 27, 1995 – June 2001

**Major Accomplishments Overall:**

- Granted an Ecclesiastical Endorsement from the LCMS of good standing, qualified, willing, and capable of working collegially in a religiously and culturally pluralistic setting without prejudice (2000)
- Graduated from the US Navy Chaplain's School on the Naval War College in Newport, Rhode Island (1997)
- Accepted reserve duty at Naval Station Great Lakes (1996)
- Accepted active-duty orders to the US Navy Training Center in San Diego, CA for Chaplain's School Training (1995)

**SELECT ARTICLES AND PAPERS FROM 2016 – 2022**

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"The Social Economics of LCMS Stewardship Practice: Aligning God's Supply with Ministry and Missional Goals," submitted for publication in *Lutheran Mission Matters: Journal of the Lutheran Society of Missions*, November 2022.

"LCMS Organizational Stewardship in the Age of Financialization," Course Curriculum and Syllabus written for D.MIN. *Missional Leadership* independent study, Concordia Seminary, November 2019.

“Organizational Forgetting,” Submitted in partial fulfillment of D.MIN. *DM9732 – Organizational Learning and the Intentional Interim Pastor*. Concordia Seminary, May 9, 2019.

“The Economic Impact of Autonomy in the Lutheran Church History,” Submitted in partial fulfillment of D.MIN. *DM – 912, Historical Theology Today*. August 24, 2017.

“Applying Human Performance Improvement Theory and Methods to LCMS Church and School Partnerships,” Submitted in partial fulfillment of D.MIN. *Wrap-around Course: Diagnostic Problem Solving – Root Cause Analysis*. Concordia Seminary, May 19, 2016.

### SELECT PRESENTATIONS FROM 2017 - 2022

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“Ministry Mapping: Fostering Congregational Sustainability During Transition Times.” Invited by *Interim Ministry Network*, Online presentation. November 3, 2022.

“Organizational Learning Theory and Practice. How Congregations Learn: Knowledge Acquisition, Sharing, Storing, and Retrieving.” Workshop I and II Theory/Practicum. Invited by *Ashland Theological Seminary, Ministry Exchange, Michigan District of the Nazarene Conference Center, Grand Ledge, MI*. September 28, 2019.

“Group Learning Event – Critical Incident Report (CIR),” Invited by *Intentional Interim Ministry Continuing Education Conference*, Michindoh Conference Center, Hillsdale, MI. October 2018.

“Change.” Invited by *National Association of Lutheran Interim Pastors*, for Interim Ministry Credentialing Course, “Basic Education for Intentional Interim Ministry,” Concordia Seminary, St. Louis, MO. May 1 - 5, 2017.

### PROFESSIONAL LICENSES

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SEI – Securities Industry Essentials Examination, FINRA	June 22, 2016
Series 24 – General Securities Principal Examination, FINRA	January 11, 2003
Series 63 – Uniform Securities Agent State Law Exam, FINRA	December 28, 1999
Series 65 – Uniform Investment Advisor Law Exam, FINRA	December 20, 1999
Series 7 – General Securities Representative Examination, FINRA	December 4, 1999

### FINANCIAL ADVISORY HONORS/AWARDS

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LPL Financial Branch Development Grant (\$26,000)	2014
Pacific Life Award for Portfolio Management and over \$1 million placed	2014
Jackson National Life Award Portfolio Management and over \$2.5 million placed	2013

Hartford Life Portfolio Management Award and over \$3 million placed	2006
Masters Certificate in Advisory Asset Management, UBS PaineWebber	March 2000
UBS PaineWebber Level One Financial Advisor Bonuses (\$14,500)	2000 - 2001

## COMMUNITY ENGAGEMENT

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### 5k Run & Walk for Your "Charity of Choice" Fundraiser

- *Race Director, Pacific Palisades, CA, raised \$30,000 for homeless person (2022)*
- *Race Director, Pacific Palisades, CA, raised over \$12,000 for STAR Preschool (2022)*
- *Race Director, Glen Burnie, MD, raised over \$10,000 to for elementary school tuition assistance (2014)*
- *Race Director, Battle Creek, MI, raised over \$5,000 for elementary school tuition assistance and for other charities (2012)*
- *Race Director, Leslie, MI, raised over \$2,000 for community charities (2010)*

### Housing for the Homeless

- *Provided overnight shelter, shower, food, and activities for women in Pacific Palisades, CA (2022)*
- *Purchased a van for a homeless man Orlando, Florida (2022)*
- *Provided overnight shelter, shower, food and activities for women and children in Glen Burnie, MD (July 2014 - November 2015)*
- *Provided overnight shelter, shower, food, and activities for a homeless person in Lansing, MI (2016)*
- *Provided three months of overnight shelter, shower, food, and activities for a homeless man (2000)*

## COLLEGIATE HONORS/LEADERSHIP

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<i>"Welcome to President Schmiel."</i> Invited by <i>Concordia University Student Government</i> , Installation service, Concordia University, Ann Arbor.	June 1991
NAIA Division II All Conference Soccer Player	1988 - 1991
Soccer Team Captain	1989 - 1991
Voted Homecoming Court	1988 - 1991
Resident Assistant (RA)	1990
Chair Student Public Review Council (SPRC), Student Government	1990

Spiritual Life Representative (SLR)	1989
Largest athletic scholarship of all sports	1989
Coach's Award	1988
Most Valuable Player (MVP) Award	1988

### PERSONAL INTERESTS

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**Marathons/Ultra.** Boston (2021), Grand Rapids (2019, 2008), Detroit (2010), Chicago (2012), Bay City (2009), Placerville (1995).

**Learning Trips.** Malawi (1992), Beijing and Manila (1988), Red Lake, Ontario (1991), and Australia (1995 and 2019).

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<sup>ii</sup> LCMS, Organized in 1847, 5,914 congregations, 1.8 million members, 822 elementary schools, 99 secondary schools, more than 1,100 early childhood centers, 2 seminaries, and 7 colleges and universities. ([www.lcms.org](http://www.lcms.org))