RON, MARTY & STEPHANIE CORDES, Cordes Foundation

Ron and Marty Cordes created the Cordes Foundation in 2006 following the sale of Ron's investment management business. The Foundation is focused on the empowerment of women and girls, social entrepreneurship and the building of sustainable, scalable solutions to global poverty.

In 2007, the Foundation became a pioneer in the emerging field of impact investing, augmenting its grants portfolio with investments designed to deliver both financial and social/environmental returns. Since then, the Foundation’s groundbreaking work in this area has been profiled in the New York Times, Forbes, FastCompany, Investment News, Financial Advisor and several other major publications.

In 2014, Ron and Marty’s daughter, Stephanie, joined the Foundation after starting her career at Condé Nast. Stephanie is focused on the intersection of ethical fashion and impact investing, and now speaks frequently on these topics at events including the NEXUS Youth Summit, MCON and the Millennial Campus Conference. She also led the Foundation’s commitment at a White House convening in 2014 to deploy 100% of its portfolio to impact.
SPEAKERS & DISCUSSION LEADERS
Speakers & Committee Members

LAUREN BOOKER ALLEN, Senior Manager, Impact Investing at Omidyar Network
Lauren leads impact investing industry development efforts at Omidyar Network, a philanthropic investment firm that has committed $850+ million to for-profit companies and non-profit organizations. She manages investments, strategic partnerships, and thought leadership initiatives that drive the firm’s field-building and engagement objectives.

Prior to joining Omidyar Network in 2012, Lauren spent five years at Goldman Sachs, most recently on the healthcare investment banking team. Previously, she was an associate in the global compliance division, covering the firm's private equity business, after beginning her career in the training and communications group, supporting firm-wide regulatory and reputational risk management efforts. Lauren’s diverse financial services background is coupled with previous experience at the intersection of business and global economic development; she has completed studies and project work in China, Malaysia, South Africa, and the Dominican Republic.

Lauren earned an MBA from Harvard Business School, and a BA in American and Urban Studies from Yale University. Lauren is the Vice Chair of the Jackie Robinson Foundation (JRF) Pacific Northwest Regional Scholar Advisory Committee and an alumni mentor of Management Leadership for Tomorrow (MLT).

ROSS BAIRD, Executive Director, Village Capital
Ross Baird developed the Village Capital concept in 2009. Village Capital sources, trains, and invests in entrepreneurs solving major global challenges, using a peer review process that delivers better results for entrepreneurs and investors. Village Capital has supported more than 450 entrepreneurs through programs over the past five years; companies have created 7,000 jobs and raised $110 million in follow on capital.

Before launching Village Capital, Ross worked with First Light Ventures, a seed stage venture fund and participated in the founding and development of four education related startup ventures: the Indian School Finance Company in Hyderabad, India, the National College Advising Corps in Chapel Hill, North Carolina, and two ventures using technology to promote civic participation. He has a MPhil from the University of Oxford, where he was a Marshall Scholar, and a BA from the University of Virginia, where he was a Truman Scholar and a Jefferson Scholar.

VICKI BENJAMIN, Sr VP, CFO & COO, Calvert Funds and Calvert Investments
Vicki Benjamin leads Calvert’s finance division with full authority and responsibility for planning, organizing, and controlling the day-to-day financial activities of the Funds and internal operations of the Calvert organization. Ms. Benjamin has assumed leadership roles in public and private financial services, as well as in the fund management industry, since 1999.

Before joining Calvert Investments, Inc., she spent ten years with KPMG in Boston as a senior audit partner in their financial services business sector for mutual and alternative funds (hedge, private equity, CDOs) and their advisors. Positions held prior to KPMG include chief accounting officer and controller at Columbia Management (formerly Liberty Financial), vice president at State Street, and senior manager at Coopers & Lybrand. Ms. Benjamin also held board positions on the Boston Partners for Youth with Disabilities, and the Boston Partners in Education non-profit organizations. She has a master’s of business administration with high distinction from Bentley College, and a bachelor of arts in Economics Business Administration, magna cum laude, from the University of New Hampshire.
SPEAKERS & DISCUSSION LEADERS

DRIANNE BENNER, CFA, Managing Director, Appomattox

Driianne Benner is a Managing Director for Appomattox. She is responsible for business development and client service. Previously, she was Global Marketing Director at Cadogan Management LLC, where she was responsible for overseeing firm-wide marketing and client communications for institutional and family office clients. Prior to joining Cadogan, she spent the ten years, most recently as a Managing Director, at U.S. Trust Company, where she developed and led client and marketing initiatives focused on investment communications, initiated an institutional consultant relations program and serviced large institutional clients. Earlier she worked at Paribas Asset Management, a global asset management firm, in a variety of roles including institutional and consultant relations to some of the largest U.S. pension funds and as a manager of portfolios in an enhanced quantitative strategy.

She earned a BA from Pennsylvania State University and attended graduate studies in regional planning in international development at Cornell University. She serves on the Board of the New York Society of Security Analysts, Peconic Green Growth as well as on the Philanthropy Committee of the Peconic Land Trust. She is a CFA Charterholder and a member of the New York Society of Security Analysts.

PREETI BHATTACHARJI, Director, Strategic Initiatives, FB Heron Foundation

Preeti Bhattacharji is the director of Strategic Initiatives at the F.B. Heron Foundation. Prior to joining Heron, she served as an assistant director of the Heilbrunn Center for Graham & Dodd Investing and a research associate for the Council on Foreign Relations. Preeti has also completed projects for ImpactAssets, Center4, the NYC Department of Small Business Services, and the Rachel Maddow Show. Preeti received her BA magna cum laude from Columbia University and her MBA with Dean’s Honors from Columbia Business School, where she won the Nathan Gantcher Prize for Social Enterprise.

ALEX BORSCHOW, co-Founder, General Partner, Semillero Ventures

Alex Borschow is passionate proponent of and investor in sustainable food and agriculture systems. Mr. Borschow is co-founder and General Partner at Semillero Ventures, a recently launched private equity investment fund focused on food and agriculture businesses in Puerto Rico. Previously, Alex was Director of Finance for Eataly USA, responsible for building out the company’s budgets and financial reporting systems while working on ways to incorporate sustainability into processes and procedures. Before Eataly, Mr. Borschow was a Director at BNP Paribas, leading the OTC Equity Derivatives Sales team for hedge fund clients in the US and Canada.

Alex is a member of the Board of Directors of Food Tank, a nonprofit that spotlights environmentally, socially, and economically sustainable ways of alleviating hunger, obesity, and poverty and creates networks of people, organizations, and content to push for food system change. He holds an SB in Chemical/Biological Engineering from MIT and an MBA and Certificate in Sustainability from the MIT Sloan School of Management, where he supports the Food Systems Sustainability program.
SPEAKERS & DISCUSSION LEADERS

Speakers & Committee Members

COLIN BROWN, COO, Skoolbo

Colin Brown is the Chief Operating Officer for Skoolbo who are helping to improve literacy, numeracy outcomes for millions of children across the world. Skoolbo is aiming to change the life outcomes of 500M children in 5 years and so far is ahead of schedule!

Colin is responsible for running 10 offices in 10 countries and rolling out Skoolbo to another 4 countries in 2016. In 2015 Skoolbo launched in India, Mexico and the Philippines and is the largest educational game in the world.

Colin’s amazing career has certainly covered a lot of ground from helping to coach Oxford in the Boat Race, taking mobile swimming pools around London as part of the London Olympics legacy, rolling out the biggest motivation system for schools in the UK and bringing in major companies into great sponsorship deals in a number of countries.

Colin is also a trustee of UK charity Women in Sport — www.womeninsport.org. Colin has an 8 year old girl (Megan) and a 5 year old boy (Toby) and lives in London.

BILL BURCKART, Founder & CEO, Burckart Consulting

William "Bill" Burckart is the Founder and CEO of Burckart Consulting, an impact investing analytics and strategy firm. He has worked as an advisor to foundations, non-profits, government and corporations to integrate their philanthropic and investment goals through the sourcing and structuring of high impact opportunities across a range of sectors. He is a visiting scholar at the Federal Reserve Bank of San Francisco, serves on the Global Advisory Council of Cornerstone Capital Group, and is a co-founder of Impact Economy. Bill has also been at the forefront of the impact investing industry and has contributed to the field through groundbreaking research. He is the author of Bringing Impact Investing Down to Earth: Insights for Making Sense, Managing Outcomes, and Meeting Client Demand (2015), Serving Client Demand for Impact Investing: A Hands-on Guide for Financial Advisors and Senior Management (2014), managed the production of and is a contributing author to the New Frontiers of Philanthropy: A Guide to the New Tools and Actors that Are Reshaping Global Philanthropy and Social Investing (2014), and was involved in the writing of the Status of the Social impact investing Market: A Primer (2013) that was distributed to policymakers at the inaugural G8-level forum on impact investing. For more information about Bill’s practice, background, and client case studies, please visit www.burckartconsulting.com.

ELLEN CAREY, Manager, Global Impact Investing Network

Ellen Carey serves as a manager at the Global Impact Investing Network (GIIN), a not-for-profit organization dedicated to increasing the scale and effectiveness of impact investing. Ellen leads the development of IRIS, the catalog of generally accepted metrics used to measure social, environmental, and financial performance of more than $10 billion of impact assets under management.

Prior to joining the GIIN, she worked as a management consultant where she focused on developing sustainable and profitable business models that benefit people living in poverty. She has worked on a variety of projects ranging from inclusive business global challenge funds to investment climate programs in conflict affected countries. She has on-the-ground experience working with entrepreneurs, investors, and governments in a variety of countries in Africa, Asia and the Middle East. Ellen holds a BA in Applied Math and Economics and a MSc in Economics, both from Johns Hopkins University.
JONATHAN CEDAR, CEO, Co-founder, BioLite

Jonathan Cedar is CEO and co-founder of BioLite, a social enterprise that develops and manufactures clean, affordable energy systems for off-grid communities around the world. The company’s first products are wood-burning stoves which reduce toxic smoke emissions by 90% while generating electricity to charge cell phones and LED lights. BioLite follows a model of “parallel innovation” in which it funds the one-time market establishment costs for its emerging markets by reinvesting revenue from product sales in US and European recreation markets.

In 2011, Business Week named Jonathan one America’s Top Social Entrepreneurs, and together with BioLite has won the 2012 Tech Awards, 2014 and 2012 Fast Company Innovation By Design Awards, and 2011 St. Andrews Prize for the Environment. Before starting BioLite, Jonathan was a Senior Design Engineer at Smart Design, a New York based product development consultancy, where he led teams that created consumer durable products ranging from housewares to biomedical devices. Jonathan holds a BA in engineering and environmental science from Dartmouth College.

MOYA CONNELLY, Senior Consultant, Deutsche Bank

Moya Connelly is an impact investment professional with extensive experience in investing and the development of investment funds. She currently works as a senior consultant at Deutsche Bank, developing investment funds and managing investments in finance services and the energy. Moya was one of the founders of MicroVest in 2002, a microfinance investment management firm. She has served as the chief financial officer of a capital management company, an investment officer (debt and equity), and a member of the Board of various microfinance organizations (MFIs and NGOs).

Prior to Deutsche Bank, she developed several funds for the European market (particularly in energy efficiency and renewable energy) and managed a large microfinance fund. She has volunteered on microfinance consulting projects for Bankers Without Borders/High Water Women. Moya has an MBA from the University of Virginia and an undergraduate degree in Economics from Smith College.

SANDY DARVILLE, Principal Specialist in the Office of the Vice Presidency, Inter American Development Bank

Sandy Darville is Principal Specialist in the Office of the Vice Presidency of the IDB, overseeing development effectiveness and impact assessment for a portfolio of over $5 bn. She was named to this position in 2013 after serving as Chief, Development Effectiveness, for the Multilateral Investment Fund, since 2010, where she introduced a new system to improve the efficiency, effectiveness and knowledge assessment of MIF programs. This system covers a portfolio of over 600 grant and investment operations supporting private sector development in Latin America and the Caribbean.

Ms. Darville brings a strong microfinance and sme operational background to this function, having previously built and led MIF’s financial inclusion activities for 12 years. Under her leadership, the MIF became the region’s most important donor and investor in microfinance and early stage equity investing in Latin America and the Caribbean. She grew the MIF portfolio from 7 to over 100 transactions, including investments and loans some of the region’s first and most important impact investments in transforming microfinance organizations, microfinance start-ups, investment funds and other vehicles. In addition to the development effects of these operations, MIF’s portfolio has demonstrated financial success. Prior to working at the MIF, Sandy was a senior investment officer at the IIC originating, analyzing and managing direct projects, financial sector transactions and equity investments throughout the LAC region.

She has served on the Boards of microfinance banks, investment funds and on the investment committee of the Consultative Group to Assist the Poor (C-GAP). She has a Masters in International Management from Thunderbird, Phoenix, AZ, and a B.A. in Economics from the University of Virginia.
SPEAKERS & DISCUSSION LEADERS

ARIANE DE VIENNE, Managing Director, Cornerstone Capital

Throughout her career, Ariane de Vienne has leveraged expertise in investment advisory and wealth management to assist high-net worth individuals, family offices and foundations to define and implement successful investment strategies.

As Managing Director at Cornerstone Capital, Ariane is charged with building the firm's ESG integrated investment advisory business. Before joining Cornerstone, Ariane was Principal at AV Advisors LP/LLC in both Hong Kong and New York. She launched and built the independent consultancy to provide investment advice to individuals and families with a focus on impact investing, as well as business consulting to intermediaries. Prior to that, Ariane was a Managing Director in Client Management at Guggenheim Investment Advisors LLC (“GIA”). There she defined and built the brand strategy to position GIA in US and off-shore UHNW markets and was responsible for business development. GIA’s investment approach used behavioral psychology methods developed by Noble Laureate, Professor Daniel Kahneman.

Ariane also served as Senior Vice President at David J. Greene and Company and in several Managing Director roles with JPMorgan Chase, including Head of EMEA, Head of the Wealthy Family Group, and Head of NY Metro I. Earlier in her career, Ariane was a Director of US Private Banking at Union Bank of Switzerland and began her career in banking in Germany.

Ariane currently serves as President and is on the Board of Directors at High Water Women, a New York City nonprofit focused on providing enriched educational opportunities for low-income youth and economic empowerment of women and children. She also serves on the US Board of Directors of The Climate Group, a global nonprofit whose mission is to work with leaders at the top of government, business and society to reduce carbon emissions and accelerate the transition to a vibrant low carbon economy. She is a Senior Advisor to Boundless Impact Investing LLC, New York, and SustainAsia Ltd, Hong Kong, and an Ambassador to TBLI, a Dutch-based organization dedicated to raising awareness about the benefits and opportunities of sustainable investing.

Ariane was educated in Germany and the US. She has lived and worked in Europe, the US and Asia and speaks three languages.

LEE ANN DILLON, Partner, Business & Finance Department, Reed Smith

Lee Ann focuses on financial services including lending and other commercial finance transactions representing arrangers, lenders, hedge funds and other providers of credit, as well as private equity funds and borrowers. Lee Ann has extensive experience with senior credit facilities including leveraged (cash flow) and investment grade, multi-currency credit facilities, cross-border financings, asset-based facilities, first and second lien credit facilities, mezzanine facilities, capital call/subscription facilities, co-investment facilities, and structured financings across broad range of industries, as well as ship finance transactions. She has regularly worked on acquisition financings, project financings, recapitalizations, as well as workouts, restructurings and the purchase and sale of distressed assets.

Lee Ann has substantial experience in the health care area, covering many sectors. She has worked on acquisition financings and other financing transactions involving hospitals, HMOs, managed care companies, physician groups, rehabilitation companies, radiology centers, medical services companies, medical device manufacturers, drug manufacturers, biotech companies and insurance and other benefits companies. She also has significant experience in secured and government guaranteed ship financings.
SPEAKERS & DISCUSSION LEADERS
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HOWARD I. FISCHER, Founder & CEO, Basso Capital Management

Howard I. Fischer is the founder and Chief Executive Officer of Basso Capital Management, L.P. a convertible securities hedge fund management company. Mr. Fischer also serves as Chairman of the Investment Committee where he is responsible for strategy allocation and risk management. Mr. Fischer is the portfolio manager for the firm’s dedicated SPAC fund as well.

Previously, Mr. Fischer was the senior trader and co-head of the institutional convertible trading desk at Smith Barney with primary responsibilities in market making, new-issue pricing and proprietary trading. Before Smith Barney, Mr. Fischer was a convertible trader at Drexel Burnham and at Cohen Feit & Company. Prior to his trading career, Mr. Fischer was a Certified Public Accountant in both public and private practice. Mr. Fischer serves as a member of the Boards of Directors of the International Mountain Bicycling Association (IMBA), Innovation in Action/the Center for Entrepreneurship and Gratitude Railroad. Gratitude Railroad is an educational, community building, and impact investment organization focused on catalyzing positive social and environmental change under the belief that non-concessionary capitalism, practiced in a conscious manner, is the most powerful and viable force to achieve a positive outcome.

He holds a B.S.E. in Accounting and Finance from the Wharton School of the University of Pennsylvania and was a fellow in the Advanced Leadership Initiative at Harvard University.

SAUNDRA GIBSON, Director, Credit Suisse, Private Banking North America

Saundra co-heads a private wealth advisory team focused on individuals, families, foundations and endowments. The team’s practice concentrates on family governance issues pertaining to wealth management including: impact investing, open architecture asset management, risk management and generational transfer issues. The team is widely recognized for extensive, thoughtful contributions to family enterprises and closely held companies for legacy and succession planning.

Saundra is the Co-Head of the Sustainability Employee Network for Credit Suisse Americas. She also sits on the board of advisors for Penn State University Planned Giving Advisory Council, Penn State University Board of Outreach, Penn State Marcellus Shale Education Consortium, and the Board of Directors for World Affairs Council Philadelphia.

JOHN GOLDSTEIN, Managing Director, Goldman Sachs

John Goldstein is a Managing Director within Goldman Sachs Asset Management. Mr. Goldstein joined Goldman Sachs in 2015 through the acquisition of Imprint Capital to help expand the firm’s Environmental, Social, and Governance (ESG) and impact investing capabilities. Previously, Mr. Goldstein co-founded Imprint Capital Advisors in 2007 to help foundations, families and financial institutions create and manage impact investing programs and portfolios. Imprint made and managed more than 120 investments with its clients across asset classes, geographies, and impact themes, and worked with 11 of the 25 largest foundations in the United States.

Previously, Mr. Goldstein co-founded Medley Capital Management (MCM), a private investment firm. He also served as Senior Managing Director of Medley Global Advisors. During that time, Mr. Goldstein co-founded and served as the Executive Director of the Medley Institute. Prior to that, Mr. Goldstein was a management consultant at Andersen Consulting (now Accenture). Mr. Goldstein graduated from Yale University with honors. He was awarded the Richter Fellowship and the Townsend Prize.

Mr. Goldstein has been an advisor or board member to a diverse set of organizations in the impact space including groups such as the U.S. National Advisory Board (NAB) of the G8 Social Impact Investing Task Force, the Global Impact Investing Network’s (GIIN) ImpactBase initiative, the Global Social Venture Competition (GSVC), McKinsey’s working group on Social Impact Bonds, Global Giving, the Sustainable Food Lab, the UN Capital Development Fund, the International Interfaith Investment Group, and a range of others.
SPEAKERS & DISCUSSION LEADERS
Speakers & Committee Members

DANIELLE GOULD, Founder, CEO, Food+Tech Connect
Danielle Gould is the Founder & CEO of Food+Tech Connect, the site of record and world’s largest community for good food innovation. Since 2010, Danielle has been the leading voice for harnessing technology, innovation and new business models to create a better food future. From her in-depth interviews with startups and innovators to her events, online business courses and consulting, she helps companies understand and capitalize on emerging business, tech and investment trends.

In 2010, Danielle launched the first-ever food hackathon, bringing together people from the worlds of food, agriculture, health, technology and design to rapidly prototype solutions to big food challenges. Since then, she has partnered with game-changing companies like Applegate, Google and Chipotle to accelerate innovation and collaboration across the food industry.

Danielle regularly speaks at conferences globally and consults corporates on food, health, technology, innovation and strategic partnerships. She has presented at The G8 Conference on Open Agricultural Data, SXSW, Menus of Change, Expo West and East, The Aspen Institute, Health Datapalooza, Edible Institute, CropLife America National Policy Conference, SOCAP, Internet Week and Social Media Week.

Danielle is a founding member of the Culinary Institute of America’s Business Leadership Council, a member of the Google Innovation Lab for Food Experiences and acting mentor for Accel Foods & Food-X. She is also a contributor to Forbes and The Huffington Post on trends in the food & ag-tech industries.

Prior to Food+Tech Connect, Danielle worked in PR and Business Development at BrightFarm Systems (now Brightfarms).

FARHA-JOYCE HABOUCHA, Director of Sustainability & Impact Investing, Senior Portfolio Manager, Managing Director, Rockefeller & Co.

Farha-Joyce Haboucha, CFA, is the Director of Sustainability & Impact Investing, a Senior Portfolio Manager and a Managing Director of Rockefeller & Co. Joyce manages the Sustainability & Impact Investing Strategy, which incorporates environmental, social and governmental criteria into the investment process.

Prior to joining Rockefeller & Co. in 1997, Joyce worked for ten years as a Senior Portfolio Manager and Co-Director of Socially Responsive Investment Services at Neuberger Berman. She was previously with Manufacturers Hanover Trust as a Vice President and Group Head of the Personal Trust Investment, Private Banking and Securities Division and served at Union Trust Company as a Senior Investment Officer, Portfolio Manager and Manager of Research. Joyce is a Chartered Financial Analyst charter holder. She received a B.A. in Comparative Literature from Columbia University. Joyce serves on the Board of the Carbon Disclosure Project USA, the Advisory Board of the Heron Foundation’s Community Investment Index, the International Corporate Governance Network Working Group on Integrated Reporting and on the Council of the International Integrated Reporting Council. Joyce has served on the Investment Policy Committee of the Financial Women’s Association of New York, and the Advisory Committee for the Socially Responsible Investment Fund of the Haas Business School at the University of California at Berkeley. Joyce is a former Chairman of the Social Venture Network and also served on the Investment Committee of the United Methodist Church, the board of FTSE4GOOD USA Advisory Committee and several non-profit organizations.
SPEAKERS & DISCUSSION LEADERS  
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LISA HALL, Managing Director, Impact Investing at Anthos Asset Management
Lisa Hall is Managing Director of Impact Investing with Anthos Asset Management, based in Amsterdam, the Netherlands. Lisa manages a global portfolio focused on social, environmental and financial returns. She previously served as CEO of Calvert Foundation, a global leader in impact investing. Lisa holds a BS in Economics from the University of Pennsylvania and an MBA from Harvard University. She previously served on the Investment Committee of Impact Assets, a non-profit financial services firm which leverages the power of impact investing.

From 2011 to 2014 she was on the Board of the Tides Network, a non-profit organization committed to social change. From 2011–2013 Lisa chaired the Board of Trustees at the Elsie Whitlow Stokes Charter School in Washington, DC and since 2013 she has served on the Board of Overseers for the Graduate School of Education at the University of Pennsylvania. Lisa resides in Amstelveen, the Netherlands, with her husband and daughter.

ROBERT HASSLER, CEO & Co-Founder, oekom research AG
Robert Hassler, born in 1965, has been working since 1993 in the fields of Sustainability Rating. He is Chief Executive Officer and co-founder of oekom research AG, the Munich-based Sustainability Rating agency providing research to a wide range of institutional investors and asset managers. He graduated in business administration at the Ludwig-Maximilian University in Munich after a two year vocational training in an auditing company. After a six months engagement in the department of Environmental Economics at the ifo-Institute, one of the most prominent economic research institutes in Germany, he joined oekom publishing house as co-founder and head of environmental research in 1992. One year later he started oekom’s rating activities by winning an international tender. He was managing director of oekom publishing house from 1997 to 1999. In 1999 the sustainability research division of oekom publishing house was transferred into the newly founded oekom research AG. Robert is also co-founder of several associations, such as the Corporate Responsibility Interface Center (CRIC e.V.) and Forum Nachhaltige Geldanlagen e.V. (German Social Investment Forum) of which he has been member of the executive board since 2001.

SPENCER J. HEMPLEMAN, Partner, Portfolio Manager, Ardsley Partners Renewable Energy Fund
Spencer J. Hempleman joined Ardsley Partners in 2002. Spencer is a Partner and serves as the Portfolio Manager of the Ardsley Partners Renewable Energy Fund. He began at Ardsley as a trader and then moved into an analyst role overseeing the alternative energy, materials and industrial sectors. Spencer’s passion for the renewable, alternative and sustainable resource sectors helped him develop a broad and deep investment expertise in those sectors which led to the launch of the renewable energy fund in July, 2006. He has been invited to speak with both the DOE and at the White House on renewable energy policy matters.

Prior to joining Ardsley, Spencer was a Director at CIBC Oppenheimer & Co., where he worked as an equity position trader focused on the utility and alternative energy sectors. Spencer was head of CIBC World Market’s U.S. Equity trading desk in London in 2001.

Spencer received his MBA from New York University and a BA from Tufts University.
SPEAKERS & DISCUSSION LEADERS

STEPHEN HOHENRIEDER, Partner, Farmland LP

Stephen Hohenrieder is an entrepreneurial private equity investor who has combined his investment and operating experience, education and interest in agriculture to deploy capital along the value chain of our food system and build a profitable, more regenerative model for managing land, producing healthy food and connecting people to each.

Stephen is a general partner at Farmland LP, a real estate private equity firm that acquires large-scale, conventional agricultural lands and infrastructure with the intent of transitioning the assets to more organic and regenerative farming methods. He is responsible for acquisitions, portfolio management and strategy for Farmland LP and its sponsored funds. Stephen is also an advisor to Prather Ranch, a vertically integrated land and beef company, and Food System 6, an accelerator that targets the food system value chain.

He was previously a partner and managing director at Bio-Logical Capital where he had broad responsibility for strategy, operations, deal origination, and fundraising. Stephen co-founded and was a managing partner of Featherstone Holdings, a firm that advises family offices making direct investments in private equity and real assets. He was also a member of the Springcreek Advisors investment committee. Prior to Featherstone, he served as COO and interim CEO of Lustre-Cal Corporation and was a co-founder of Watermark Labels. Stephen founded the wealth and asset management businesses at ThinkEquity Partners, where he profitably built them from concept to more than a billion dollars of assets in two and a half years when ThinkEquity was sold to Panmure Gordon. He began his career with Montgomery Securities/Bank of America where he spent nine years investing on behalf of family offices, foundations and their related entities. He graduated from Cal Poly, San Luis Obispo with a degree in Agribusiness.

ERIKA KARP, Founder & CEO, Cornerstone Capital Inc.

Erika Karp is the Founder and CEO of Cornerstone Capital Inc. The mission of the firm is to apply the principles of sustainable finance across the capital markets enhancing investment processes through transparency and collaboration. In seeking positive societal impact at scale, Cornerstone offers investment and wealth management, research and strategic consulting, and investment banking services. Working with investors, corporations and financial institutions, the firm drives the systematic analysis of Environmental, Social and Governance (ESG) factors throughout the global capital markets.

Prior to founding Cornerstone, Karp was Managing Director and Head of Global Sector Research at UBS Investment Bank where she chaired the UBS Global Investment Review Committee and managed a global team of analysts and strategists. Erika is an advisor to the UN Global Compact’s LEAD Board Development Program, a founding Board member of the Sustainability Accounting Standards Board, a member of the World Economic Forum’s Global Agenda Council on Financing and Capital, and an Advisor to the Clinton Global Initiative’s Market-based Approaches track. Karp has been named to the nation’s “Top 50 Women in Wealth” by AdvisorOne, the “GOOD 100” and the “Purpose Economy 100” and listed as one of 50 “Conscious Capitalists” who are “Transforming Wall Street” in 2015.
SPEAKERS & DISCUSSION LEADERS

KAREN KARP, Karen Karp & Partners
Karen Karp is a fourth-generation food entrepreneur. Her great grandfather Morris, a first generation immigrant from Ukraine, opened a butter, eggs, and cheese wholesale outlet on Manhattan’s far west side, and later a feed and seed company on Coney Island Avenue in Brooklyn. In the 1930s the family relocated to Farmingdale, Long Island, where Karen’s grandfather transitioned Morris Karp & Son into Long Island’s first commercial manufacturer and distributor of fertilizer. After the sale of the company, Karen’s father Alan continued to serve the farmers of Long Island’s East End as a real estate broker concentrating on industrial and agricultural properties, and brokered the country’s first Transfer of Development Rights deal in the 1970s.

Karen grew up visiting the farms with her father, but felt the irresistible pull of New York City, where she moved in 1978 to attend Parsons School of Design. Restaurant jobs put food on the table and captured her heart, and by the age of 29, Karen had grown a trendy downtown restaurant group from one to six outlets, before setting her sights on entrepreneurship. Establishing Karen Karp & Partners in 1990 (as Karp Resources), Karen developed interests that would soon become the company’s well-regarded niche: developing a range of bespoke strategies that explore the interconnections between agriculture, food, policy and people, and how to marry common interests of the for-profit and nonprofit sectors.

In 2001 Karen obtained a master’s degree from the University of Bath School of Management, earning honors for her thesis, “How Does Food Sustain Us?” which explored how leaders convey and impart their personal food values within their organizations, and how these communities are then transformed through food. KK&P has grown to become a nationally respected boutique consultancy with a uniquely skilled staff and a diverse roster of clients. Karen and her team are equally adept in the boardroom, in the kitchen, or on the land – their systems-based approach is always both conceptually rigorous and grounded in practical understanding. Karen’s real success is measured by her ability to change the way a wide range of people – corporate executives, school officials, distributors, educators, and farmers – think about how food can be produced, processed and distributed, and how she encourages them to overcome challenges and pursue innovation.

SEAN KEOGH, the Head of Strategic Transactions Group, Development Credit Authority, USAID
Sean Keogh is the Head of Strategic Transactions Group in USAID’s Development Credit Authority (DCA). He leads the origination and structuring of unique capital market solutions to tackle development problems globally. Mr. Keogh has over 15 years of experience in multiple fixed income markets, including emerging markets structured credit; interest rate derivatives; and mortgage backed securities. Prior to his current role, Mr. Keogh worked at Aldwych Capital Partners, LLC where he launched the global capital markets business and at Citigroup Global Capital Markets.

Mr. Keogh earned his MBA from the Yale School of Management with concentrations in Finance, Investment Management and Public Management.
LAUREN KOOPMAN, Director, Sustainable Business Solutions Practice, PwC
Lauren Koopman is the Director of the Sustainable Business Solutions Practice at PwC, where she leads work on sustainability strategy for financial institutions. She helps institutional investors (including private equity and asset managers) integrate environmental and social considerations into current and future investments. She also leads PwC’s pro bono work with the United Nations CEO Water Mandate.

Prior to PwC, Lauren was Vice President at Deutsche Bank where she structured equity derivatives transactions for institutional investors (hedge funds, mutual funds, life insurance companies). She was also the Business Development Manager at Bank of America where she identified and structured new partnership opportunities.

Lauren has a Masters in Environmental Engineering from the University of Melbourne, Australia. An MBA in Finance and BA in Public Policy. She’s traveled throughout the world viewing sustainability issues first-hand in Africa, India, China/Tibet, the Middle East and the Arctic Circle. She was selected in 2015 as a Young Global Leader by the World Economic Forum.

STEVE M. LIBERATORE, CFA, Managing Director & Fixed-income Portfolio Manager, TIAA-CREF Asset Management
Mr. Liberatore is the lead portfolio manager for the organization’s Socially Responsible investment (SRI) fixed income mandates and holds responsibility for investment strategy and securities selection. He joined TIAA-CREF in 2004. Mr. Liberatore has 20 years of industry experience, including positions at Nationwide Mutual Insurance Co. and Protective Life Corporation, where he was responsible for portfolio management, credit research and trading for both total return and liability-driven assets.

Mr. Liberatore is considered a subject matter expert on the management of total return SRI fixed-income portfolios, and he frequently presents at both SRI and fixed-income conferences. His views on developments in these areas have been featured in numerous industry publications. Mr. Liberatore is a member of the initial executive committee of the Green Bond Principles and the CERES Green Bond Working Group.

Mr. Liberatore holds a B.S. from the State University of New York at Buffalo and an MBA in finance and operations from Wake Forest University’s Babcock Graduate School of Management. He holds the Chartered Financial Analyst designation and is a member of the CFA Society North Carolina and the CFA Institute.

LAURA KIND MCKENNA, Managing Trustee, The Patricia Kind Family Foundation
Laura Kind McKenna has served as the Managing Trustee of the Patricia Kind Family Foundation since the fall of 1998. The Foundation, started by Laura’s mother Patricia Kind, provides grants to health and human service organizations in the Philadelphia area. Laura is committed to the importance of Mission Related Investing for Foundations and individuals. She believes it is vitally important to link assets with mission and values to achieve a double bottom line. Over the past 17 years the Patricia Kind Family Foundation has invested more than 30 million dollars in the region through direct grants and mission related investments.

Laura received her BSN from The American University in Washington DC in 1978 and her Master’s Degree in Nursing from the University of Pennsylvania in 1981. Laura was employed as a nurse practitioner and Director of Student Health Services at La Salle University from 1986 - 1998. She served as a Board Member at La Salle University from 2002-2012. She is currently a Board Member of the vanAmeringen Foundation, a philanthropic foundation focused on mental health needs, located in NYC. Laura is also a member of Investor’s Circle Philadelphia. Laura has volunteered weekly as a nurse practitioner at the House of Grace Catholic Worker Free Medical Clinic in Kensington for over twenty years. Married for 37 years to Marc Walsh McKenna, M.D, they have four grown children and three grandchildren.
SPEAKERS & DISCUSSION LEADERS
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JANET MCKINLEY, Advance Global Capital
Janet has over 25 years of investment experience, having managed global portfolios in 3 of the 10 largest equity mutual funds in the United States. She retired in 2004 as a Director of Capital Research and Management Company (assets in excess of USD 1 trillion) and Principal Executive Officer of The Income Fund of America. An active philanthropist for over 20 years, Janet currently serves on the board of Berkeley Endowment Management Company as Chair Emerita, with prior service as Board Chair of Oxfam America, and Board Trustee of Oxfam International, Smith College, the Deutsche Bank Microfinance Consortium Fund and MicroCredit Enterprises. She was a Fulbright Scholar, received her BA degree from Smith College, and attended New York University Graduate School of Business.

JOHN MEYERS, Managing Director, Swisscontact, North America
Since 2012, John Meyers has represented Swisscontact to corporations, foundations, and partner organizations in North America; he also serves as the Swisscontact representative to the UN Economic and Social Council. He is on the leadership team for Swisscontact's "Technical Assistance Facility" initiative to support innovative financing and business growth development through Impact Investing and public-, multi-lateral and private partnerships. Active internationally for much of his career, John has been appointed twice to the U.S. delegation for the Asia Pacific Economic Cooperation (APEC) Human Resource Development Working Group; formerly served as Executive Director of Lawyers Without Borders; and was a founding editor of the Journal of Studies in International Education. Prior to joining Swisscontact, John served as Director, Global Programs, and Senior Advisor, New Business Development and Social Investing at Aid to Artisans. John has also served as Senior Advisor to Caribbean-based foundations and served on the Board of Directors of The American University of Paris. He has spoken on topics ranging from financing the Sustainable Development Goals and business-education partnerships to philanthropy and digital convergence and has served as a subject matter resource to publications including The New York Times, Black Enterprise and Chronicle of Philanthropy. John received his B.A. in International Relations from The American University of Paris; MLS from Rutgers University; and M.A. in History from Columbia University.

BONNY MOELLENBROCK, Executive Director, Investors’ Circle
Bonny Moellenbrock is the Executive Director of Investors’ Circle, the largest and most active early-stage impact investing network in the world. Since 1992, IC has propelled nearly $200 million into 300+ for-profit enterprises dedicated to improving the environment, education, health, and community. Previously, Bonny was a Managing Director at SJF Ventures, a leading impact venture fund investing in high-growth, positive impact companies in the cleantech, sustainability, and tech-enhanced services sectors. Before joining SJF in 2000, she served as COO and CFO of Preservation North Carolina and on the management team of an entrepreneurial recycling company. Bonny serves on the GIIRS Developed Markets Standards Advisory Council, the Advisory Board of AMCREF Community Capital, the Board of the CAHEC Capital Loan Fund, and the Board of Trustees of the Resource Center for Women and Ministry in the South. She holds an MBA, a Master of Regional Planning, and a BA in Environmental Policy from UNC-Chapel Hill, and is a graduate of the Venture Capital Institute. Bonny enjoys gardening and making music with her husband and two daughters at their historic bungalow in Durham, NC.
SPEAKERS & DISCUSSION LEADERS
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ANDREA TURNER MOFFITT, Co-Founder, Plum Alley Investments, Senior Vice President, Center for Talent Innovation

Andrea Turner Moffitt is a national thought leader on women investors. Her new book *Harness the Power of the Purse: Winning Women Investors* is the culmination of three years of research on women investors across six countries. She also co-authored a groundbreaking global study on women investors at the Center for Talent Innovation where she is a Senior Vice President. Her work has been featured in the Forbes, Harvard Business Review, Inc., NPR, New York Times, Wall Street Journal, among other media outlets. Turner Moffitt specializes in issues relating to women investors, leadership, diversity and social impact making her a sought after resource for companies building talent and business strategies to realize growth opportunities in diverse markets.

Turner Moffitt is also the co-founder of Plum Alley Investments, a private investment platform offering a new way for women and men to discover, learn and invest in women entrepreneurs and gender diverse teams. As a former investment banker and hedge fund analyst, Turner Moffitt has extensive investing background across various asset classes. She worked globally at Citibank structuring investment products and leading over $1 billion of debt financings. Earlier in her career, she helped build a hedge fund of funds with responsibility for overseeing the firm’s portfolio of investments and leading marketing and capital raising efforts with high net worth and institutional investors. Turner Moffitt began her career at Robertson Stephens where she sourced and financed high growth technology companies.

An honors graduate from Columbia Business School and the School of International and Public Affairs, she earned her BA from Tulane University. Turner Moffitt is the Co-chair of Columbia Business School's Social Enterprise Alumni Circle and is a term member of the Council on Foreign Relations. She lives in Brooklyn Heights with her husband and two young children.

GREG NEICHIN, Director, Ceniarth LLC

Greg is the Director of Ceniarth, a single-family office focused on funding scalable solutions to the world’s big challenges. Ceniarth aims to provide capital to accelerate the deployment of products and services that directly impact underserved communities. The firm’s investing and philanthropic activity, mostly in the form of program related investments, is oriented toward the challenges of effectively scaling the adoption of appropriate solutions in ways that are commercially sustainable. Ceniarth’s primary sectors of interest are energy access and agriculture with a geographic emphasis on frontier markets.

Prior to Ceniarth, Greg served as Executive Vice President of Cleantech Group where he led the firm’s global advisory business helping investors identify and evaluate opportunities in energy and resource markets. He spent four years on the management team of GetActive Software, one of the earliest, online fundraising platforms for charities and political advocacy groups and co-founded PlaceVine, an online marketplace to fund independent film & media. Greg began his career as a consultant with Oliver Wyman. Greg has a B.A. from Dartmouth College and an M.B.A. from the Wharton School at the University of Pennsylvania.
KEITH PALZER, Director, Disputes & Investigations and Financial Services Management Consulting practices, Navigant

Keith Palzer is a Director in Navigant’s Disputes & Investigations and Financial Services Management Consulting practices. Keith has more than 25 years of experience in the financial markets as a banker and a lawyer. He has managed hedge fund and derivatives businesses, led new financial product development teams, and executed hundreds of derivatives and other transactions with nearly every type of institutional and retail investor. As a lawyer, Keith has served in government, private law firms, and international banks.

In the Financial Services Management Consulting practice, Keith advises asset management firms and hedge funds on corporate strategy, financial regulation/compliance, and risk management issues with particular focus on the “liquid alternatives” mutual fund market. He leads Navigant project management and technology teams in a variety of financial initiatives. In the Disputes & Investigations group, Keith serves as an expert witness in capital markets litigation, manages hedge fund insolvencies, and advises on regulatory investigations.

AMIE PATEL, Vice President, Goldman Sachs Asset Management

Amie Patel is a Vice President with Goldman Sachs Asset Management. Ms. Patel joined Goldman Sachs through the acquisition of Imprint Capital to help expand the firm’s ESG and impact investing capabilities. Ms. Patel is with the Alternative Investments & Manager Selection (AIMS) Group and based in New York, where she is a member of the AIMS Imprint team.

Prior to this, she was with the Soros Economic Development Fund where she focused on early to growth stage investments. She managed the Fund’s investments in Haiti and worked on several other investment opportunities in Palestine, India and parts of Africa. Previously, she worked with the Overseas Private Investment Corporation as a Presidential Management Fellow and Investment Funds Officer responsible for developing and evaluating top-quartile and first-time emerging market private equity fund managers. Ms. Patel began her career as an M&A analyst with Merrill Lynch and First Union Securities covering the automotive, healthcare and telecommunications industries. She also spent just under a year in Nepal with Students Partnership Worldwide as a Program Manager working on environmental education and women’s issues. She holds an M.B.A. from Georgetown University and a B.S. in Business Administration from Washington University in St. Louis, MO.

HIMANI PHADKE, Sustainability Accounting Standards Board

Himani Phadke joined SASB in 2012 and currently leads research on industry-specific sustainability issues and their financial value impacts, resulting in the identification of disclosure topics for SASB standards and development of research publications outlining the evidence basis for the topics.

Prior to joining SASB, Himani co-founded a renewable energy social enterprise, REWiRE, focused on scaling up energy access solutions for emerging markets. She has previous experience in financial consulting at LEVG, London, and policy development at the UK Treasury. At the Treasury, she worked on legislative and regulatory proposals for investment banking reform, the former being subsequently adopted by the UK Parliament. Himani has an MA in International Policy—Energy and Environment, from Stanford University, an MSc in Development Economics from Oxford University (UK) and a BA in Economics and Statistics from Mumbai University (India).
ALEXANDRA POE, Partner, Reed Smith  
co-Founder, Chair Emeritus, High Water Women Foundation

Sandra is a leader of the private fund formation and counseling practice in the firm’s Corporate and Transactional Advisory Group. She has over 25 years of experience in investment management practice. Sandra also represents significant government contractors in compliance matters.

Sandra counsels hedge and private equity fund advisers in all stages of their business, including fund formation, structuring the manager and its affiliates, adviser registration, compliance program development, compliance training and advice, placement arrangements, marketing, client relations, side letter and seeding arrangements, implementation of liquidity strategies, and day to day trading and operations advice. She also advises clients acquiring investment in non-traditional assets such as ships and trade receivables, and regarding participation in, establishment or restructuring of managed account programs. Further, she has represented financial industry clients in connection with mergers and acquisitions, and strategic joint ventures, implementation of prosecutorial settlement agreements, governance matters and due diligence.

Sandra also has considerable in-house experience in general counsel and chief legal officer roles, advising boards and C-suite officers on matters of consequence, including responses to government examinations and investigations, investor litigation, and responding to fiduciary and auditor independence issues of great significance. She is a co-Founder and Chair Emeritus of High Water Women Foundation and chaired the HWW Symposium: Investing for Impact, in 2013 and 2014.

KALPANA RAINA, Managing Partner, 252 Solutions

Kalpana Raina is the managing partner of 252 Solutions, LLC, an advisory and investment firm with a focus on Social Enterprises. She is a senior executive with extensive financial experience in the US and internationally. She has lived and worked in Asia, Europe, Canada and the US and has strong expertise in credit, strategic planning, creating alliances and partnerships, extending operations globally and introducing new products to markets.

Formerly, Ms Raina was an Executive Vice President with The Bank of New York, a global financial services company. During her eighteen-year career with the bank she had responsibility for clients in the Media and Telecommunications industry, Healthcare, Retailing, Hotels and Leisure and Financial services industries in Europe, Asia and the US. Ms. Raina also taught undergraduate courses in English and World Literature at McMaster University in Hamilton, Canada. She has a Master’s degree in English Literature from McMaster University and undergraduate and graduate degrees from Panjab University, India.

Ms Raina currently serves on the boards of John Wiley and Sons, Information Services Group in the US and Yellow Media Group in Canada. Previously she was on the board of RealNetworks, Inc., The World Policy Institute, and the Center for Communications. She is on the advisory board of Women Corporate Directors, and a past member of The US- India Business Council.
SPEAKERS & DISCUSSION LEADERS

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MARC ROBERT, Partner, Water Asset Management

Mr. Robert is one of three Partners at Water Asset Management, a global investor in water companies and assets that ensure water availability and quality. Water Asset Management is one of the few firms that invests exclusively in the global water sector with long only, long short and private equity vehicles and has just completed its 9th year.

Prior to joining Water Asset Management, Marc was a Managing Director at Morgan Stanley and the head of US equity research sales. He along with his partners, Disque Deane and Matt Diserio, built Water Asset Management because of the compelling investment characteristics of the sector and its need for capital and innovation. Mr. Robert is also the Board Chair of WaterAid America, a global charity focused on providing access to safe water and sanitation. He graduated from Brown University in 1982 with a BA in Religious Studies.

JOHN ROGERS, Partner, Co-founder U.S. Sustainable Growth Fund, Bridges Ventures

John Rogers is a partner with Bridges Ventures and co-founder of Bridges’ U.S. Sustainable Growth Fund. He focuses on the themes of health and wellness, education and skills and sustainability and invests in high-growth, high-impact businesses located in or serving underserved markets. John serves as chair of the board of Springboard Education, Bridges’ recent investment in a provider of extended learning time, currently serving over 3,000 lower- and moderate-income children on 62 public and charter school campuses across 11 states and the District of Columbia.

John has been investing in the education and healthcare sectors for over 15 years. Prior to joining Bridges, John was a Partner and Head of the Healthcare & Education Group at Gryphon Investors where he led investments in the outpatient physical therapy, career and technical training and experiential learning sectors. John was previously a Vice President at Deutsche Bank’s principal investment arm, DB Capital.

Prior to business school, John worked in Oakland, CA, first in affordable housing development with Jubilee West, and then in public health with the Alameda County Health Care Services Agency where he launched one of the country’s first healthy homes initiatives to clean up environmental hazards in family homes. John has an undergraduate degree from Yale University and an MBA from Stanford’s Graduate School of Business. He is currently completing an EdD in education management at the University of Pennsylvania’s Graduate School of Education.

DIMPLE SAHNI, Senior Director, Impact Investing at Anthos Asset Management

Dimple Sahni joined Anthos Asset Management in the fall of 2014. As senior director in the impact investing team, Dimple is responsible for originating investments, managing relationships, and helping to execute strategies for the portfolios at Anthos Asset Management dedicated to impact investing. This includes Skopos Impact Fund, a global, private, impact investing fund focused on measurable, positive social and environmental returns alongside financial returns, with the aim to promote human dignity and social justice.

Originally from India, Dimple is an experienced investment professional – with over 20 years of experience in impact investing, investment banking, technology, emerging markets, and venture capital – who began her career in finance working for Goldman Sachs. She then launched a social enterprise focused on education, which was later sold to Accenture. Dimple more recently worked in venture capital and private equity for Omidyar Network, an impact investing organization, and L Capital Partners in its technology, energy and environment practice where she was a Kauffman Fellow. Most recently Dimple consulted with Unilever Corporate Ventures on its exploration of a venture investment program in emerging Asia.

Dimple holds an MBA from the Wharton School at the University of Pennsylvania and received her BA from the University of Chicago. Dimple recently relocated from San Francisco to Amsterdam, the Netherlands. She is fluent in Hindi.
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DEBRA SCHWARTZ, Managing Director, Impact Investments, John D. and Catherine T. MacArthur Foundation

Debra Schwartz is Managing Director, Impact Investments, for the John D. and Catherine T. MacArthur Foundation. A private, international charitable foundation headquartered in Chicago, MacArthur maintains offices in India, Mexico and Nigeria. Each year, the foundation awards ~$250 million to advance a limited number of major commitments focused on critical challenges, such as global climate change.

Debra is an internationally recognized leader in impact investing with 30 years experience in investment banking, public and nonprofit finance, social enterprise, affordable housing and community development. She joined MacArthur in 1995 and currently oversees a $300 million investment portfolio dedicated to maximizing impact. Her team of banking and finance professionals deploy these assets and provide expertise to further strategic philanthropic priorities across the foundation.

A hallmark of MacArthur’s approach is to actively craft sophisticated, risk-tolerant loans, guarantees and equity investments that unlock substantial additional capital from other investors who are deterred from engaging with unconventional social enterprises and markets due to real and perceived risks, transaction size and cost, long time horizons to exit, modest margins, and other factors.

Debra is a frequent public speaker and lecturer at leading universities, including the University of Chicago, Oxford, Yale, Harvard, Stanford and Northwestern, bringing an in-depth, practical perspective to the challenge of building high-performing, mission-driven nonprofits and businesses and the critical role of strategic impact investment in fostering a more vibrant, sustainable social sector. From 2013-2014, she served on the US National Advisory Board to the G8 Global Social Impact Investment Task Force. Debra is a past presidential appointee to the United States Treasury Department Community Development Advisory Board, a founder of Mission Investors Exchange, and a member of several other boards and informal advisory committees. She received her Masters of Management in Finance and Nonprofit Management from the Kellogg School at Northwestern University and a Bachelor’s in History, summa cum laude, from Yale University in 1984.

FRAN SEEGULL, Managing Director & CIO, Impact Assets

Fran Seegull is Chief Investment Officer and Managing Director at Impact Assets — a non-profit investment firm seeking to increase the flow of capital to impact investing. She leads the Investments team at Impact Assets, oversees product development and manages the Investment Strategies suite of products, including the Global Sustainable Agriculture and Microfinance Plus Notes. She also heads investment management for The Giving Fund — a $200 million impact investing donor advised fund — including investment selection, monitoring and reporting.

Previously, Seegull was Managing Director and COO of Funk Ventures, an early stage venture capital and acceleration firm investing in clean technology, sustainability, wellness and medical technologies.

Seegull has consulted to National Geographic, NPR and many family foundations. She served as VP of Business Development at Novica, a venture-backed social enterprise offering artisanal products from Asia, Africa and Latin America.

Seegull has a BS in economics from Barnard/Columbia and an MBA from Harvard Business School. Seegull is Adjunct Professor at the Lloyd Greif Center for Entrepreneurial Studies and Senior Fellow at the Brittingham Social Enterprise Lab, both at USC’s Marshall School of Business. She serves on the board of the Barbara Lee Family Foundation and the Investment Committee of the Goldhirsh Foundation.
SPEAKERS & DISCUSSION LEADERS

JULIE SHAFER, Head of Strategic Philanthropy & Purpose Investing
Family Wealth Advisors, Bank of the West Wealth Management

Julie Shafer is Head of Strategic Philanthropy and Purpose Investing for Family Wealth Advisors, the ultra high net worth division of Bank of the West Wealth Management. She helps personalize giving strategies for families and individuals through the exploration of giving goals and motivations and creates customized strategies that are effective and measurable to allow not-for-profits to quickly develop a model of sustainability and impact.

Ms. Shafer has more than 20 years of experience working with philanthropists, foundations, not-for-profits and corporations both nationally and globally. Prior to joining Bank of the West, she led a highly successful Strategic Philanthropy Consulting firm which specialized in efficient, thoughtful and effective strategic planning for donors and grantees. She previously served in several senior not-for-profit executive positions including Director of Development at the Institute for Neurodegenerative Diseases UCSF and as Executive Director of the Silver Giving Foundation.

She holds a B.A. from the University of California and a MFCC from University of San Francisco.

DOMINIQUE BANGASSER SLAVIN, Executive Director, Treehouse Investments

Dominique is the Executive Director of Treehouse Investments, LLC, a privately owned fund focused on socially responsible investing in the areas of climate change and gender inclusion. In this role, Dominique evaluates potential investment targets, leads due diligence, and oversees most aspects of the investment portfolio. She is also Managing Director of Aspenall Energies, LLC, a portfolio company which develops renewable energy projects in the United States and the Caribbean. Dominique has a BA in Humanities from the University of Chicago, an MSc in Philosophy from the University of Edinburgh, and an MBA from the Interamerican University of Puerto Rico. She is a CPA.

ANNA K. SNIDER, CAIA, Managing Director, Head of Global Equity and Impact Investing Due Diligence, Merrill Lynch Wealth Management

Anna is responsible for equity and multi-asset strategy manager research for the wealth management businesses. She also leads the impact investing effort for the CIO Office, focused on impact strategy research, thought leadership and investment guidance, including co-portfolio manager for the Sustainable Impact Portfolios. Anna joined U.S. Trust in 2003 as a senior analyst in the risk management division before moving to the alternative investments group where she advised clients on hedge fund and private assets portfolio construction and became head of research for externally managed alternative investment fund of funds. Anna has 18 years of investment and risk analysis experience, having held positions at the Federal Reserve Bank of New York, JP Morgan and UBS focusing on market, credit and operational risk management. She graduated from Connecticut College in 1997 with a B.A. in International Relations and Economics with a Japanese concentration. She is a Chartered Alternative Investment Analyst and is Series 7, 66 and 24 licensed. Anna is chair of the board of High Water Women, a foundation based in New York City focused on economic empowerment for women and low income youth.
SPEAKERS & DISCUSSION LEADERS

AARTHI SOWRIRAJAN, Director, Turner Impact

Aarthi Sowrirajan is a Director at Turner Impact Capital and serves as a Regional Director of the Turner-Agassi Charter School Facilities Fund. Based in Los Angeles, Ms. Sowrirajan manages the Fund's business development efforts for the West and Southwest regions, including identifying high-performing charter school partners. In addition, she is responsible for underwriting, structuring, negotiating and executing investment opportunities, managing Fund finances, investor relations and the various operational needs of the Fund. Previously, she served as Assistant Vice President at Canyon Capital Realty Advisors LLC and the Canyon-Agassi Charter School Facilities Fund. Ms. Sowrirajan was previously an Associate at Deutsche Bank Securities in the Structured Products Group, underwriting deals and structuring debt financing for non-prime mortgage originators and credit card companies through bond offerings in the capital markets. She has also held a position as a Summer Associate at Credit Suisse within various Equity and Debt Sales and Trading teams. Ms. Sowrirajan is a graduate of the University of Chicago (B.A., Honors, Economics) and the Wharton School of the University of Pennsylvania (M.B.A.). She has served on the Board of Directors of Equitas Academy, a high-performing charter school in Los Angeles, CA, as the Treasurer and a member of the Facilities Committee.

SILDA WALL SPITZER, Principal, New World Capital Group

Silda Wall Spitzer gratefully lives impact daily as Principal at New World Capital Group, a private equity firm investing for top-tier growth equity and infrastructure project finance returns in Environmental Opportunities (energy efficiency, clean energy, water, waste-to-value and environmental services). Her career has encompassed the public, private and nonprofits sectors: Co-Founder/CEO/Publisher of NewYorkStatesOfMind.com, first private digital magazine and marketplace for the state; Managing Director at a woman-owned investment firm; First Lady of NYS, launching show-the-way green buildings, alternative energy, and local food initiatives; Co-Founder/leader of Children for Children, now Points of Light’s generationOn; and practicing M&A/corporate lawyer for a decade. She holds a JD from Harvard Law School and a BA summa cum laude and Honorary Doctorate from Meredith College.

KATE STARR, CFA, Founder, Starria

Kate Starr, CFA, Founder of Starria and former Vice President, Capital Deployment, Heron Foundation. Kate works with foundations, investors, and firms interested in building a practice of impact investing across a portfolio. At Heron, Kate led the development of the investment strategy and policy that called for deploying 100% of Heron's financial assets toward its social mission. She managed the $300 million portfolio across a variety of businesses, markets, and financial instruments, including grants to non-profit organizations. Kate is a member of the CFA Institute, the New York Society of Security Analysts, and the Mission Investors Exchange. Prior to joining Heron in 2001, Kate worked as a consultant at AT Kearney's Global Business Policy Council, a research associate at microfinance institution PRIDE Tanzania, and as an economics and equity analyst at First Asset Management. Kate earned a BA in English and Italian from Indiana University, a MA in International Relations from Johns Hopkins’ School for Advanced International Studies, and is a Chartered Financial Analyst. Find her on the web (www.starria.nyc) and on Twitter: @KateTStarr.
SPEAKERS & DISCUSSION LEADERS

MITCHELL L. STRAUSS, Special Advisor SRI Finance, Overseas Private Investment Corporation

Ms. Strauss is Special Advisor for Socially Responsible Investment Finance at the Overseas Private Investment Corporation, a U.S. government corporation charged with mobilizing and facilitating US private investment and skills transfer in developing countries throughout the world. She is responsible for policy matters and origination of innovative financing products and structures designed specifically to leverage socially responsible investment to achieve sustainable projects in emerging markets. She collaborates with other U.S. private sector, government and international government entities to assist in coordinating private and public funding to efficiently support projects with socially responsible or impact investment elements for the corporation including micro finance and SME businesses. Formerly the Director of Credit Policy for the corporation, and as a former private sector banker, she held various positions in finance and banking. Ms. Strauss has an MBA from the University of Connecticut and a BA from Lake Forest College.

CANDICE TSE, Vice President, Senior Strategist, Goldman Sachs

Candice Tse is a vice president and senior strategist within GSAM’s Third Party Distribution Portfolio Strategy Group, focusing on international (developed/emerging) markets, market strategy and portfolio construction. Candice has been with Goldman Sachs Asset Management for over 14 years. She joined the portfolio strategy team after receiving her M.B.A. in Finance and Management from Columbia Business School. Prior to attending Columbia, Candice spent three years in Institutional Sales focusing on relationship management and business development for middle market clients. Before joining the sales team, Candice worked in Portfolio Administration for four years and was the team leader for Institutional Equity. She graduated from Rutgers University Magna Cum Laude with a Bachelor of Science degree in Marketing.

STEVIE VALDEZ, Senior Associate of Impact Investing & Market Development, Global Alliance for Clean Cookstoves

Stevie Valdez is the Senior Associate of Impact Investing and Market Development at the Global Alliance for Clean Cookstoves. She manages the Alliance’s Spark Fund, an innovative grant fund which provides investment-like growth capital and capacity development to help enterprises reach commercial viability, scale, and ultimately unlock additional investments for future growth. Since joining the Alliance, she has helped define and implement the Alliance’s investment strategy including a redesign of the Spark Fund. Stevie is also responsible for increasing awareness of clean cooking enterprises in the investor community and driving investment into the sector. Prior to joining the Alliance, she worked for Relief International’s Social Enterprise division supporting the cookstoves and microfinance programs and has worked in various sectors such as retail banking, import-export consulting and education. She has over 6 years of experience developing business plans, conducting feasibility analysis and market research. She holds a Master’s degree in Social Enterprise from American University’s School of International Service and a Bachelor’s degree from Gonzaga University.
SPEAKERS & DISCUSSION LEADERS

Jackie VanderBrug, Senior Vice President, Global Portfolio Solutions & Institutional Investments, US Trust, Bank of America Private Wealth Management

Jackie VanderBrug is a senior vice president within Global Portfolio Solutions & Institutional Investments at U.S. Trust, Bank of America Private Wealth Management. She is responsible for formulating and developing the firm’s impact investing strategy as well as the product offerings across asset classes that align with our client’s objectives.

Jackie brings a broad array of experiences including entrepreneur, analyst and strategy consultant. Jackie led the development of the emerging field of gender lens investing as a founder of the Women Effect Investments initiative. As Managing Director at Criterion Ventures, she was instrumental in the establishment of the pioneering social investing fund, Good Capital. She led Business Development at iBasis, growing the global VOIP firm through a successful IPO and cofounded WORK IN PROGRESS, a non-profit social enterprise. Her understanding of the interrelated aspects of social change was first formed as a domestic policy analyst for the U.S. Congress and she formed her strategy skills while as a management consultant for CSC Index.

Jackie is a Aspen Institute First Mover Fellow and serves on the board of the Trustees of the Donations. She received her M.B.A from the Ross School of Business at the University of Michigan and her B.S. in Mathematics from Calvin College.

Flory Wilson, Director of B Analytics and GIIRS, B Lab

Flory Wilson brings 15 years of experience in emerging market private-sector led investing and impact measurement to her role as B Lab’s Director of B Analytics and GIIRS. B Analytics is the world’s largest database of impact and ESG data for privately held companies and funds, with GIIRS impact ratings providing much of that data.

Flory joined B Lab in April 2010, working on the core team that launched B Analytics and GIIRS. Flory’s primary focus is working with investors who have ESG and positive impact requirements for their private equity portfolios. Previously, Flory was a Senior International Economist in the Office of Investment Policy at the Overseas Private Investment Corporation (OPIC) in Washington, D.C.

She holds a M.A. in international relations from Johns Hopkins Nitze School for Advanced International Standards (SAIS) and graduated cum laude from Colgate University. She lives with her husband and two young children in Brooklyn.
SPEAKERS & DISCUSSION LEADERS

ADAM WOLFENSOHN, Co-Managing Partner, Encourage Capital
Adam Wolfensohn is Co-Managing Partner of Encourage Capital, an asset management firm focused on profitable and strategic investments to solve critical social and environmental problems. The organization was formed by the recent merger of Wolfensohn Fund Management and EKO Asset Management. A unique partnership of disciplined investors and creative problem-solvers, the new firm is already working with major asset owners to deploy investment capital to solve problems like global ecosystem decline, climate change, and bringing financial services to the world’s poor.

Prior to 2015 Mr. Wolfensohn was a Partner at Wolfensohn Fund Management and a member of the Investment Committee. Since 2002, he has also managed the Wolfensohn family office cleantech and environmental markets strategies where he is an active investor in sustainability oriented funds and companies and for which he serves on the board of EKO asset management. From 2003 to 2006, he produced the climate change documentary, “Everything’s Cool,” that debuted at the Sundance Film Festival in 2007. From 2002 to 2003, he managed pioneering work with Conservation International and major music tours to offset their emissions through avoided deforestation projects. Mr. Wolfensohn is a frequent speaker on sustainability and impact investment.

Prior to 2002, Mr. Wolfensohn composed music for numerous films, television commercials and theater productions, and he was founder and CEO of “Red Ramona,” an award winning music and sound design studio in New York City. He is a Trustee of the Brooklyn Academy of Music, Yad Hanadiv, the Harmony Institute, Bang on a Can and the Wolfensohn Family Foundation where he directs environmental grant making. He is a member of the Council on Foreign Relations and also serves on the Investment Committee of the Rockefeller Brothers Fund. Mr. Wolfensohn earned a B.A. from Princeton University and an M.E.M. from the Yale School of Forestry and Environmental Studies.

DR. ION YADIGAROGLU, Partner, Managing Principal, Capricorn Investment Group
Dr. Ion Yadigaroglu is Partner and Managing Principal at Capricorn Investment Group, a leading cleantech investment firm. Ion oversees investment activities, with an emphasis on direct investments and proprietary strategies. Prior to Capricorn, Ion was a Director of Business Development (M&A) with Koch Industries, executing a range of acquisitions and investments.

Prior to Koch, he was a founder and Chief Executive Officer at Bivio, a software business in Colorado, and an Analyst for Olsen & Associates, a foreign exchange trading house. Ion was a research fellow at Columbia University and holds a Masters in Physics from Eidgenössische Technische Hochschule Zürich in Switzerland and a Ph.D. in Astrophysics from Stanford University.