SPEAKERS & DISCUSSION LEADERS

ELIZABETH L. LITTLEFIELD

Elizabeth L. Littlefield was appointed by President Obama as the President and CEO of OPIC, an Under Secretary level position. OPIC, as the US Government’s Development Finance Institution, manages an $18 bn portfolio of financing and insurance to support private investment in sustainable economic development, especially in the world’s poorest countries.

Under Littlefield’s leadership, OPIC’s annual commitments to renewable resources projects grew ten-fold in three years to $1.5 bn, while generating increasing income for the U.S. federal budget. Littlefield has also instituted major reforms of the agency’s policies, systems, and processes, and has introduced new financial innovations to augment the agency’s development impact.

From 2000 until 2010 Ms. Littlefield was CEO of CGAP (Consultative Group to Assist the Poor), a policy and research center housed at the World Bank dedicated to advancing poor people’s access to financial services.

Prior to joining CGAP in 1999, Littlefield was JP Morgan’s Managing Director in charge of capital markets and financing in emerging Europe, Middle East and Africa, among other positions. Littlefield spent 1989-1990 in West and Central Africa consulting several start-up microfinance institutions. She is a graduate of Brown University and also attended Ecole Nationale de Sciences Politiques in Paris.
SPEAKERS & DISCUSSION LEADERS
Speakers & Committee Members

DAVID BANK, CEO and Editor, ImpactAlpha

David Bank is the CEO and editor of ImpactAlpha, “investment news for a sustainable edge.” ImpactAlpha, with its affiliated database, ImpactSpace, provides stories and data about investments that generate financial returns through social and environmental solutions.

Previously, David was a reporter for the Wall Street Journal, where he covered Microsoft and the software industry and established the philanthropy beat. His book, Breaking Windows (Free Press, 2001), was named one of the year’s best business books. Later, as vice president of Encore.org, he developed the campaign around encore careers, second acts for the greater good. David was a Nieman Fellow at Harvard University and is a graduate of Columbia Journalism School and UC Santa Cruz.

VICKI BENJAMIN, Exec VP, CFO and COO, 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 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.

DRIANNE BENNER, CFA, Managing Director, Appomattox Advisory

Drianne 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 global 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 quantitative investment research, 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, New York City Audubon, and Peconic Green Growth. She is a CFA Charterholder and a member of the New York Society of Security Analysts.
VIVINA BERLA, Co-Managing Partner, Sarona Asset Management

After a first career spent in industry and over 20 years in the institutional investment world, Vivina has now combined her experience and a desire for positive change to join the impact investing world. Vivina spent ten years with Merrill Lynch Investment Managers and then joined Gartmore Investment Management as head of EMEA. Since July 2009, she has lived in Amsterdam and is now managing Sarona and its growth, linking investors ‘capital to entrepreneurs’ needs in Frontier and Emerging Markets, keen for Sarona to achieve Growth that Matters. Sarona is a committed member of the impact investing community, a leader in the "Blended Finance" space and attaches great importance to GPs’ and companies’ ESG behaviour. Vivina graduated from the London School of Economics and obtained an MBA from the Tuck School of Business in the US. She is a member of the LSE Court of Governors and Finance Committee.

PETER BERNARD, COO, Root Capital

Peter retired from his post as a managing director and the chief risk officer of D.E. Shaw & Company at the end of 2013. Previously, he was president, chief operating officer, and chief financial officer at AlphaSimplex Group, a Cambridge-based investment management firm.

From 2000 to 2004, he was the chief financial officer at Risk Metrics Group, a New York-based company which specializes in risk management software and data. In 1994, he co-founded New Bond Trading, Inc., an investment management firm specializing in fixed-income arbitrage, and was president of the company until 2000. Prior to that, Peter held various positions at J.P. Morgan & Co., where he worked for fifteen years. In 1987 and 1988, he advised the Presidential Task Force on Market Mechanisms (the “Brady Commission”) which investigated the causes of the October 1987 stock market crash. He received a B.A. in economics from Bowdoin College.

SARA BRAND, Founding General Partner, True Wealth Ventures

Founding General Partner of True Wealth Ventures, a $20M VC fund based in Austin, Dr. Sara Brand is passionate about investing in women-led businesses in consumer health and sustainable products and technologies to deliver true wealth. Sara has a unique combination of capabilities as a strategic thinker integrated with a proven success record for delivering results. Over her career, she has been fortunate to work with and contribute to some of the top teams in the technology industry and has cultivated a diverse portfolio of leadership experiences including:

- Managing $150M venture fund with four other investment professionals at Fremont Ventures in San Francisco, named as one of the top 10 venture capital firms for adding value to portfolio companies
- Working in large tech companies including Intel, Applied Materials and Advanced Micro Devices and directly with 3 Fortune 500 CEOs and their teams in strategic and operational capacities
- Leading business units from $0 to $100M in revenue
- Acquiring startups and integrating them into large publicly-traded corporations & leading company mergers and cross-functional dynamics
- Consulting across the semiconductor industry with McKinsey & Co. out of the San Francisco office
- Founding (512) Brewing Company, the largest draught only, self-distributing microbrewery in the United States

Sara holds a Ph.D. and M.S. in Green Design and Manufacturing, a minor in Public Health and Energy, and a Management of Technology Certification from UC Berkeley where she currently serves on the Mechanical Engineering Department’s External Advisory Board. Dr. Brand also holds a BS in Mechanical Engineering from UT Austin where she now serves on the Cockrell School of Engineering’s External Advisory Board and currently acts as Senior Advisor for Health IoT to UT’s new Dell Medical School to foster health technology innovations across industry, academia and community.
MOYA CONNELLY,

Moya Connelly is an impact investment professional with extensive experience in investing and the development of investment funds. 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 (lending and equity), and a member of the Board of various microfinance organizations (MFIs and NGOs).

Moya is currently a Vice-President at Deutsche Bank, developing investment funds and managing investments in finance services and in the energy sector. 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.

ARLYN DAVICH, Founder and CEO, PayPerks

PayPerks is an education, engagement and behavior change platform that improves the health and well-being of low- and moderate income consumers. For years, PayPerks has been helping the country’s largest banks and government programs improve financial health outcomes for their most vulnerable constituents. Now, PayPerks is extending its technology and expertise to allow institutions across the public and private sector to improve nutrition and healthcare outcomes. PayPerks has amassed dozens of honors over the years from organizations ranging from the White House to the U.S. Department of Treasury to the Federal Reserve Bank. Outside of work, Arlyn founded the Bowdoin Startup Series and sits on the Board of Trustees for The Pingry School.

LISA DAVIS, Director, Investor Relations & Specialty Investment Originations, Pembrook Capital Management

Prior to joining Pembrook, Ms. Davis served as a Program Officer at the Ford Foundation, Metropolitan Opportunity Program in NY where she helped place over $45 million in grants and nearly $10 million in program related investments annually for national initiatives. She was responsible for overseeing US-based affordable housing and community development finance portfolios, as well as impact investing work. She sits on the Board of Directors for the Brooklyn Navy Yard and is a member of the Affordable and Multifamily Housing Council of the Urban Land Institute.

Earlier in her career, she served as vice president and project executive at New Boston Fund, a private real estate investment management firm, where she directed master planning, investment and development of over $300 million in mixed-use projects in Boston. Prior to that, she was director of development for the Codman Square Neighborhood Development Corporation and director of housing and development for the Asian Community Development Corporation, two nonprofit community development corporations in Boston. Ms. Davis holds a Master of Science in Real Estate Development and a Master of City Planning from the Massachusetts Institute of Technology where she was a Harry S. Truman Scholar. She holds a bachelor’s degree from the University of Texas at Austin.
JAMES DEARBORN, Head of Municipal Investing, Columbia Threadneedle

James Dearborn is a senior portfolio manager and the head of municipal bond investments for Columbia Threadneedle. He joined one of the Columbia Threadneedle legacy firms in 1996.

Previously, Mr. Dearborn worked at Moody’s Investors Service as a senior analyst in the state and high-profile rating group. He was also a member of the firm’s rating committee. He has been a member of the investment community since 1986.

Mr. Dearborn received a B.A. from Wesleyan University in Connecticut and an M.A. in public administration from the Maxwell School of Citizenship and Public Affairs at Syracuse University. James Dearborn sets the strategic direction for municipal bond investments and works diligently to deliver municipal bond strategies that meet client needs. He works with a dedicated team of municipal portfolio managers, research analysts and traders to foster a collaborative and interactive environment that allows their best investment ideas to emerge. Mr. Dearborn and his investment team manage 19 mutual funds, as well as numerous high-net-worth and institutional accounts. His experience leading the municipal team and managing Columbia U.S. Social Bond Fund makes him an appealing spokesperson with original and timely content to share.

ARIANE DE Vienne, Director Business Development North America and Head of New York Office for oekom research Inc,

Throughout her career, Ariane de Vienne has leveraged expertise in investment advisory and wealth management to assist family offices, foundations and other institutional investors to define and implement successful investment strategies. As Director Business Development North America and Head of New York Office for oekom research Inc, one of the leading global ESG research and rating firms, Ariane is responsible for building oekom’s presence in North America and growing oekom’s work with institutional investors and asset managers.

Prior responsibilities included Managing Director at Cornerstone Capital, 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. Before 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., Ariane began her career in banking in Germany.

MONICA BRAND ENGEL, Partner, Quona Capital

Monica Brand Engel is an investor and entrepreneur, having launched a number of investment vehicles and products aimed at broadening financial inclusion. A Peruvian American, Monica spent her formative years in Silicon Valley and is a disciple of agile development and user-centered design. The financial inclusion businesses she helped launch include Quona Capital, Accion Frontier Inclusion Fund and its predecessor fund, Frontier Investments Group, Anthuri Catalysts (Cape Town venture capital accelerator), a Calvert index fund (Bethesda based socially responsible mutual fund), lending intermediaries sponsored by The Development Fund (San Francisco based) and new business lines with Compartamos (now Gentera, the largest microfinance institution in Mexico). She serves on the boards of Zoonas, Azimo and Paralife, and she was previously on the boards of Shubham, GloboKasNet, and Compartamos. Monica lives in the Washington, DC area with her husband and twin children.
SPEAKERS & DISCUSSION LEADERS

Speakers & Committee Members

DR. JOAN FALLON, Founder and CEO, Curemark
Dr. Fallon is considered a visionary scientist with a Phase III treatment for Autism in clinical trials. Curemark has commenced the filing of a Rolling New Drug Application for the first novel drug for autism under the FDA Fast Track Program. Joan holds 55 patents worldwide, has written numerous scholarly articles, and lectured extensively across the globe on pediatric developmental problems including autism and ADHD. Dr. Fallon was recently appointed Senior Advisor to the Henry Crown Fellows at The Aspen Institute, as well as a Distinguished Fellow at the Athena Center for Leadership Studies at Barnard College/Columbia University. She is also a member of the Board of Trustees of Franklin & Marshall College.

KIM FREMONT FORTUNATO, Director-Community Affairs and President, Campbell Soup Foundation
Kim Fremont Fortunato was named Director-Community Affairs and President-Campbell Soup Foundation in May 2016. Kim is responsible for Campbell’s community affairs strategy and program, including employee volunteerism, Campbell’s Healthy Communities programming, and enterprise-wide expansion of the community affairs strategies. She joined Campbell in 2010 as Director of Campbell’s Healthy Communities, the first position of its kind for a food company. Campbell’s Healthy Communities strives to improve the health of young people in Campbell communities by reducing childhood obesity and hunger. The Healthy Communities model, based on collective impact methodology, has been called best-in-class for the industry. Launched in Camden, N.J., home to Campbell’s World Headquarters, the program has scaled to four other locations where Campbell has U.S. operations: Norwalk, Conn; Henry County, Ohio; Everett, Wash.; and Detroit, Mich. Under Kim’s leadership, the initiative has become the company’s signature philanthropic program, and it has been replicated by industry members. Kim has more than 20 years of experience in philanthropy, social change, and non-profit leadership. Previously, she served as President of Operation Warm, Inc., growing the regional non-profit to one of national stature. She also co-founded Social Venture Partners Delaware, a venture philanthropy organization focused on investments in early childhood education for at-risk children. She began her career as a lawyer. Kim earned her B.A. degree in French and comparative literature from Duke University, and her J.D. degree from Widener University School of Law.

IVAN FRISHBERG, First Vice President, Sustainability Banking, Amalgamated Bank
Ivan Frishberg leads Amalgamated Bank’s Sustainability Banking division. Frishberg works across the bank on a range of banking, investment and lending products designed to serve sustainability goals and the goals of our clients in the energy, climate and environment communities. Frishberg has more than 25 years of public interest advocacy, organizing and policy experience. Previously he was Climate Change Campaign Manager for OFA, a senior advisor to the Climate Action Campaign, a multi-year national coalition effort to defend the Clean Air Act and support new federal policies on climate and public health, directed the State Climate Hub – facilitating coordination of state level efforts to implement the Clean Power Plan, and worked with the Climate Briefing Service on the intersection of US Climate Advocacy and the recent international climate negotiations.
**SPEAKERS & DISCUSSION LEADERS**

**Speakers & Committee Members**

**KARINA FUNK, CFA, Portfolio Manager, Head of Sustainable Investing Strategies, Brown Advisory**

Karina Funk, CFA, is co-portfolio manager of the Brown Advisory Large-Cap Sustainable Growth strategy, and Head of Sustainable Investing at Brown Advisory. Karina joined Brown Advisory in 2009 and has extensive environmentally-oriented investment experience spanning early-stage ventures to debt and public equities.

Karina was previously an equity research analyst for Winslow Management Co, a principal at Charles River Ventures, and an investment manager at the Massachusetts Renewable Energy Trust. Karina and co-portfolio manager David Powell have developed a fundamental research methodology around Environmental Business Advantages (EBA): a philosophy focused on “performance first” investing at the intersection with long-term sustainability.

**Education**
- École Polytechnique, France, Post-Graduate Diploma (1998)
- MIT, MS in Civil & Environmental Engineering (1997)
- MIT, MS in Technology & Policy (1997)
- Purdue University, BS in Chemical Engineering (1994)

**Community Involvement**
- MIT Ignite Clean Energy Business Plan Competition Founding Mentor and Judge
- Massachusetts Technology Transfer Center Investor Advisory Board (previous)
- International Women’s Forum Leadership Foundation Fellow

**DARCY GARNER BHATIA, Channel Family Assets**

Ms. Garner has over 20 years leadership experience in the investment management industry, and serves as an advisor to entrepreneurial individuals and families. She started her firm, Channel Family Assets in 2011 and works with high net worth families around their investments, estate planning, and family education.

From 2002-2011, Ms. Garner was a founding Partner of Highmount Capital, a $2.5 billion dollar wealth management firm with offices in New York, Boston, Amsterdam and Zurich. While at Highmount, Ms. Garner was directly involved in having her firm achieve a number of awards, including the PAM Awards as the best multi-family office in 2011. She was responsible for the firm’s internal investment capabilities and led the investment portfolios and staff. During her tenure, she was responsible for the firm’s marketing and branding. While at Highmount, Ms. Garner was responsible for developing governance and financial education programs for families.

Ms. Garner received her BS from Tulane University in New Orleans and her MBA from Thunderbird, The Graduate School of International Management in Glendale, Arizona. Ms. Garner has served on a variety of non-for-profit boards including K.I.D.S. and was a founding and advisory member of The Redwoods Initiative. She has been a member of the Women’s Presidents Organization (WPO), Financial Women’s Association (FWA), New York Society of Security Analysts (NYSSA), The CFA Institute, Financial Planning Associations (FPA), and STEP. She holds a series 65, and has her Chartered Financial Analyst (CFA) designation. She has been a member of Golden Seeds, a women’s angel investing group and on the Board of Springboard Enterprises, a venture catalyst for emerging growth ventures led by women. She recently co-founded The Foundation for Gender Equality and Women’s Empowerment and serves as the Chief Financial Officer.
ERIC GLASS, Senior Portfolio Manager, Alliance Bernstein

Eric Glass is a Portfolio Manager and member of the Municipal Impact Investment Policy Group. He is also a member of AB’s firmwide Responsible Investment Committee. He joined the firm in 2000, and has previously served as a research analyst and trader within AB’s Municipal team.

Before joining AB, Glass was on the municipal research team at Moody’s Investors Service. Before a career in capital markets, he spent several years working and managing a transitional homeless shelter in Essex County, New Jersey. Glass holds a BS in business administration from the University of Richmond and an MA in public administration from Columbia University. He is a CFA charterholder.

AB’s Municipal Impact Strategy is designed to build and strengthen our nation’s physical and intellectual infrastructure, deliver positive social and environmental impact and offer clients attractive after-tax returns with moderate volatility. Portfolio holdings will focus and promote investment in underserved and/or low socio-economic communities in sectors like education, healthcare, renewable energy, mass transit and water/sewer infrastructure where quantifiable environmental and/or social impact can be realized. Issuers must meet minimum requirements based on environmental, social and governance criteria to qualify for inclusion. Our Municipal Impact portfolios were developed to offset equity market volatility, generate returns in line if not better than traditional municipal products with similar duration, and most importantly, deliver environmental and social impact.

STEVEN GODEKE, Trustee, Jessie Smith Noyes Foundation and Founder, Godeke Consulting

Steven helps foundations, families and money managers drive positive change. Godeke Consulting develops specific impact investing strategies and connects its clients to the best partners and resources. His clients include The Rockefeller Foundation, The Global Impact Investing Network, The World Economic Forum and corporate clients in the financial services and pharmaceutical industries.

Steven is a trustee and chairs the investment committee of the Jessie Smith Noyes Foundation, a private family foundation with a long tradition of aligning its investments and social justice mission. The foundation supports grassroots organizations that work for environmental justice, reproductive rights and health, and sustainable and equitable food systems.

Steven is also an adjunct professor of finance at New York University’s Stern School of Business and the Center for Global Affairs where he teaches Investing for Environmental and Social Impact. Prior to establishing his own firm, Steven worked in corporate and project finance with Deutsche Bank. He studied as a Fulbright Scholar at the University of Cologne and earned an M.P.A. from Harvard University.

MICHELLE GONZALEZ, Managing Director, Co-founder, The Influencer Series

Michelle Gonzalez is currently an EIR at Comcast Ventures. Prior to Comcast Ventures, Michelle was a senior product leader at Apple. During her tenure at Apple, Michelle conducted the first pitch and led all aspects of product and strategy for Apple News.

Michelle previously led product, global business development and international expansion for iBooks in addition to heading up iTunes Movies internationally. Michelle is the co-founder and co-CEO of the Influencer Series, a intimate, invite only roundtable series of influential, good energy leaders. The Influencer Series partners with top venture capitalists and Fortune 500 companies. Prior to her work at Apple, Michelle was VP of Business Development at Cinedigm, a business affairs executive at MGM Studios and started her career as an associate at McKinsey & Co. Michelle is a graduate of the University of Oklahoma and received her J.D. from Yale Law School. She also co-founded the Ivy Plus Society SF and the non-profit Yale in Hollywood.
TARYN GOODMAN, Senior Director, Investment Partnerships

Taryn Goodman is responsible for structuring and managing external investment partnerships for NatureVest, The Nature Conservancy’s program developing opportunities to drive private investment capital to conservation.

Previously Taryn was the Director of Impact Investing at RSF Social Finance where she launched RSF’s Program Related Investing Fund focused in food & agriculture, managed the $40 million Donor Advised Fund Impact Investment Portfolios, and led strategic partnerships and initiatives for the organization.

Taryn has also worked for Kiva as a fellow with Micro Credit Development Trust, a microfinance institute in Kampala, Uganda, where she supported the transition of the organization from a non-profit to a cooperative. Taryn earned a Bachelor of Science degree from Cornell University and an MBA from Cornell University’s Johnson School of Management where she helped launch BR MicroCapital, the first MBA student managed microfinance fund, and was a recipient of the Park Fellowship for leadership and service. Taryn lives in San Francisco where she spends her time enjoying the Bay Area’s many outdoor activities.

TARA HIGGINS, Partner, Orrick Herrington Sutcliffe

Tara Higgins, a partner in the New York office, is co-head of the Global Power Practice. She focuses primarily on domestic and international energy and infrastructure-related projects, including project financings, credit enhancement facilities, high yield and bond financings, and other senior secured lending transactions, project development, restructurings and bankruptcy-related transactions, including Section 363 sales, mergers and acquisitions, joint development arrangements, limited partners, and other member investments and miscellaneous investor arrangements.

Tara has represented lenders, multilateral agencies and investment funds in connection with solar, wind, biomass and other alternative energy projects, midstream gas gathering and processing, gas pipelines and gas storage facilities, water and waste treatment plants, industrial plants, and transportation projects. She has represented multilateral agencies, private investment funds and lenders in equity investments and lending transactions in many countries, including Argentina, Bermuda, Brazil, Cayman Islands, Mauritius, the Middle East, sub-Saharan Africa, the Philippines, Panama, Russia and other former Soviet republics, Southeast Europe, South Africa, Turkey and Uganda. Prior to joining Orrick, Tara was the co-chair of Bingham McCutchen’s Energy and Project Finance Group.

MICHAEL HOELTER, Africa Agriculture and Trade Investment Fund, Deutsche Bank

Michael joined Deutsche Bank in 2011 and focuses on debt investments into businesses active in the food and trade sector, renewable energy projects which includes electrification.

Michael further oversees the investment activities into financial institutions. His primary responsibility is leading the investment mandate from the Africa Agriculture and Trade Investment Fund while he is further engaged setting up and managing investment funds that target a reduction of greenhouse gas emissions globally through their investment activity and/or financial inclusion. Funds follow public private-partnership structures with public funding enabling the mobilization of private sector capital or, alternatively, purely privately set up investment funds. A further range of products concludes adaptation projects that enable private sector capital to support the adaptation of societies to the inevitable stage of the changing climate. In this context, Michael is responsible for the accreditation status of Deutsche Bank group with the Green Climate Fund (GCF).
SUMMERLY HORNING, VP Industry Relations, Tau Investments

Summerly is the founder of a company designed to revolutionize the retail banking system and redirect power to people and community. She is head of partnerships for the Fourth Sector Group, whose mission is to accelerate the transition to an economy in which the purpose of enterprise is the advancement of social, environmental and economic benefit - yielding sustainable, inclusive, and resilient societies. She is a board member of Newport Federal, her family’s holding company, which owns and operates real estate and land assets, hotels and operating companies.

Summerly is an advisor to TAU, a growth-equity investment firm, which transforms global apparel supply chains for planet and profit. She is an advisor to Golden Renewable Energy, which manufactures modular units that turn landfill waste into renewable diesel. She is also an advisor to Lumera, an impact infrastructure investment firm.

Summerly is a National Council Member of the Smithsonian National Museum of the American Indian and serves on the task force for the White House’s Generation Indigenous initiative. She serves on the advisory board for GoGood, a fully optimized platform to enable global participation in philanthropy. Summerly serves on the World Economic Forum’s new Global Agenda Council on the Future of the Fashion, Luxury and Lifestyle Industry. She is a member of the Milken Young Leaders Circle and a member of Nexus Global Youth Summit, serving on their Impact Investing and Climate Change committees. She is a member of Toniic, a global network of active impact investors, and is a student of the 2015/2016 Harvard Kennedy School Impact Investing for the Next Generation.

PAULUS INGRAM, Managing Partner, ARC Fiduciary

ARC Fiduciary is a specialist Investment Advisor sponsoring fiduciary institutional products targeting financial outperformance that support UN Sustainable Development Goals. ARC’s Energy Transition Opportunity Fund is focused on Climate Change, pursuing tactical investment opportunities in construction ready U.S. energy infrastructure projects.

Previously, Paulus was Head of Hedge Fund Investments at APG Asset Management, responsible for a $25 billion hedge fund program. He was a Senior Portfolio Manager on APG’s Opportunity Fund. He has also served on APG’s Sustainable Development Investments Task Force and as a member of the Sustainability and Governance Team. Paulus was Chair of the hedge fund workstream for the UN PRI and a member of the AIMA Investor Chapter.

Paulus began his career at D.E. Shaw and has twenty years of investment and asset management experience focused on alternative investments. He’s a graduate of Amherst College with a double major, attended Oxford University’s Said School of Business Private Equity Program, holds a Masters in International Finance with honors from the University of Amsterdam and a Master of Laws from the Duisenberg Honors Program, a special joint program of the Vrije University and University of Amsterdam. Paulus holds the Chartered Alternative Investment Analyst (CAIA) designation, the CFA Society of the UK Investment Management Certificate and a Certificate in Real Estate Development from the Urban Land Institute (ULI).
HILARY IRBY, Managing Director, Morgan Stanley

Hilary Irby is a Managing Director in Morgan Stanley’s Global Sustainable Finance group, where she serves as Head of the Morgan Stanley Investing with Impact Initiative. She also leads strategic initiatives at Morgan Stanley’s Institute for Sustainable Investing, which seeks to mobilize private-sector capital to major global challenges. In her roles, Hilary focuses on the development of financial products and solutions providing financial returns as well as positive environmental or social impact.

Prior to Morgan Stanley, Hilary was Operating Partner at JVP, a leading Israeli venture capital fund with over $900 million under management, where she oversaw the Firm’s fund management, international operations, investor relations and marketing. She also worked as part of the management team to drive the Firm’s organizational strategy and spearheaded business development in the US for JVP and its portfolio companies.

Previously, Hilary worked at Goldman Sachs & Co.; helped manage the growth of Fort Point Partners, an internet consulting and integration firm; and served as a change management consultant at Andersen Consulting. Hilary holds a Masters in Industrial and Organizational Psychology from Rensselaer Polytechnic Institute and a Bachelor of Science from St. Lawrence University. She is a Member of the Board of Directors of US SIF, The Forum for Sustainable and Responsible Investment.

ERIC JACOBSEN, Co-founder, Gratitude Railroad

Gratitude Railroad is a community of investors committed to helping solve environmental and social problems through the profitable deployment of capital into conscious businesses. He is also co-founder of Dolphin Capital, a private equity firm which invests in high growth companies in the Mountain West region, in Utah.

Previously, Jacobsen was the founder and CEO of TNT Sound which was sold in 1983, Vice President of MECA Software which went public and was sold to H&R Block in 1994, and Founder and President of Home Financial Network which was sold to Sybase in 2000. Jacobsen chairs the boards of Ragnar Events and Winder Farms. He also sits on the boards of Innovation in Action’s Audacious Institute & Frank Hervey Cook Scholarship. Jacobsen received a bachelor's degree from Stanford University and is a graduate of Harvard University’s Advanced Leadership Initiative, The intersection of Compassion and Capitalism.

GAYLE JENNINGS-O'BYRNE, Co-Founder and General Partner, Maya Ventures Partners

After 20+ years of wall street, technology, philanthropy and policy, Gayle (Gay:lä) is embracing her female superpowers to amplify social change. Her boldest endeavor to date is building a venture capital ecosystem, with The Harriet Fund I, an early stage fund and Harriet Angels to invest in technology startups led by Black and Latina women founders. Inspired by American icon Harriet Tubman, The Harriet Fund I and Harriet Angels, provide a variety of investors access to untapped value and opportunity within the fastest growing entrepreneurial sector.

Gayle is channeling wisdom from her roles at JPMorgan Chase and Sun Microsystems and tapping into her learnings as a graduate of Wharton School of Business and University of Michigan, plus participation in 500VC Unlocked/Stanford University, the National University of Singapore and City of London Polytechnic programs. Advisory boards have included Ghetto Film School, Cinema High School, Eagle Academy and Scholastic, and recently the ClimateDonor.org and Gigameet. Proud to be a Nantucket Project Scholar; speaker at SOCAP16, 2016 Aspen Ideas Festival and Mission Investors Exchange; Tribeca Disruptor Fellow and Investments & Wealth Monitor Magazine columnist.
JALAK JOBANPUTRA, Founder and Managing Partner, Future Perfect Ventures

Jalak Jobanputra is Founding Partner of Future Perfect Ventures, a venture capital fund in NYC focused on early stage investments in next generation technology including blockchain and machine learning. Before founding Future Perfect Ventures in 2013, Jobanputra was the Director of Mobile Investments in Emerging Markets at Omidyar Network. She has 20 years experience in venture capital, impact investing, media and technology. She was previously Senior Vice President at the New York City Investment Fund (NYCIF), a private economic development fund, where she managed the fund’s technology and digital media venture investments. While there, Jobanputra spearheaded the formation NYSeed in 2008, and helped launch the FinTech Innovation Lab, which has since been replicated in London and Hong Kong. Jobanputra worked closely with the Bloomberg administration and NYCEDC to implement initiatives to help diversify the NYC economy through NYC’s growing tech/digital sectors.

Prior to NYCIF, she was a Principal at New Venture Partners, a $300 million early stage venture fund that commercialized technology out of corporate labs. At NVP, Jobanputra incubated a range of technologies, including speech recognition/NLP, 3D displays, video surveillance, 4G wireless broadband, and music recommendation software. From 1999-2003, Jobanputra was at Intel Capital in Silicon Valley, where she invested in enterprise software, internet and digital media startups. Jobanputra currently sits on the Board of Directors for the Center for an Urban Future, Advisory Board of L’Oreal’s Women in Digital Initiative, is a member of Mayor DeBlasio’s Broadband Taskforce, and served on Secretary Clinton’s Women’s Leadership Council. Jobanputra spent four months setting up microfinance programs and training women entrepreneurs in Dar es Salaam, Tanzania after receiving her MBA from the Kellogg School of Management in 1999. She graduated magna cum laude from the University of Pennsylvania with a BA in Communications from the Annenberg School and a BSE in Finance from the Wharton School.

GEORGIA LEVENSON KEOHANE, Executive Director, Pershing Square Foundation

Pershing Square Foundation is a New York-based family foundation that supports exceptional leaders and innovative organizations that tackle important social issues and deliver scalable and sustainable impact. From 2014-2016, Keohane directed New America’s Profits & Purpose program, an initiative exploring ways in which social entrepreneurship, innovation, and finance addresses some of our most pressing social and economic challenges.

Keohane is also an adjunct professor in the Social Enterprise Program at Columbia Business School, and speaks and writes regularly on social and economic policy and the intersection of business and society. Her work has appeared in the New York Times, Foreign Affairs, Time, the Harvard Business Review, the Washington Monthly, Slate, the Nation, and other publications. She is the author of Social Entrepreneurship for the 21st Century: Innovation Across the Nonprofit, Private and Public Sectors (McGraw Hill 2013) and Capital and the Common Good: How Innovative Finance is Tackling the World’s Most Urgent Problems (Columbia University, 2016).

Keohane’s career has bridged the private and nonprofit sectors. A former McKinsey consultant, she advises a number of organizations including philanthropies, community development and finance organizations, educational entities, think tanks and social purpose companies. From 2011-2014, Keohane was a fellow at the Roosevelt Institute, where she worked on a range of issues in economic policy, including poverty and inequality, employment and job growth, social entrepreneurship and the role of firms in society. She has taught at Yale, and serves on the boards of several nonprofit organizations. Keohane holds a B.A. from Yale University, an M.B.A. from Harvard Business School, and an M.Sc. from London School of Economics, where she was a Fulbright Scholar.
SPEAKERS & DISCUSSION LEADERS

Speakers & Committee Members

JUSTINA LAI, Director of Impact Investing, Wetherby Asset Management

Justina joined Wetherby Asset Management in 2015 where she leads the firm’s impact investment strategy. Prior to Wetherby, she was a Director and Senior Investment Analyst focused on global impact investment strategies in the private markets at Sonen Capital. Previously, Justina helped manage the Rockefeller Foundation’s Program Related Investments portfolio comprised of domestic and international impact investments in private equity and private debt. She was also a core member of the Impact Investing team where she advanced and shaped the initiative strategy focused on building the field of impact investing. In addition, she has held positions with Legacy Venture in Palo Alto, CA and Rwanda Ventures, a business incubator launching and operating sustainable agricultural companies in Kigali, Rwanda.

Prior to her career in impact investing, Justina spent several years in investment banking with Citigroup and private equity with Vestar Capital Partners in New York and Paris. Justina received a BS in Finance and International Business, summa cum laude, from New York University and an MBA with certificates in Public and Global Management from Stanford University’s Graduate School of Business. Justina is a Board Member and Finance Committee Chair of Turning Green.

LINDA-ELING LEE, Managing Director and Global Head of ESG Research, MSCI

As Global Head of Research for MSCI’s ESG Research group, Linda oversees all ESG-related content and methodology and chairs MSCI’s ESG Ratings Review Committee. She leads one of the largest teams of research analysts in the world who are dedicated to identifying risks and opportunities arising from material ESG issues. The team, located in 12 offices globally, provides ESG ratings of 5,000+ issuers; industry and thematic research; and analysis used by investors for positive and negative screening.

Linda joined MSCI in 2010 following the acquisition of RiskMetrics, where she led ESG ratings research and was head of consumer sector analysis. Linda joined RiskMetrics Group in 2009 through the acquisition of Innovest. Prior to joining Innovest, Linda was the Research Director at the Center for Research on Corporate Performance, developing academic research at Harvard Business School into management tools to drive long-term corporate performance. Previously, she was a strategy consultant with Monitor Group in Europe and in Asia, where she worked with Fortune 500 clients in industries ranging from beverages to telecommunications. Linda received her AB from Harvard, MSt from Oxford, and PhD in Organizational Behavior from Harvard University. Linda has published research both in management journals such as the Harvard Business Review and MIT’s Sloan Management Review, as well as in top academic peer-reviewed journals such as Management Science and Journal of Organizational Behavior.

CHRISTINA LEIJONHUFVUD, Managing Partner, Tideline

Christina Leijonhufvud is a Managing Partner at Tideline and co-leads the growth and strategy of the firm. Ms. Leijonhufvud focuses particularly on investment structuring and strategy, due diligence of investment opportunities and products, and risk analysis. Prior to Tideline, Christina was Managing Director at J.P. Morgan where she worked for over 15 years. At J.P. Morgan, she created the firm’s Social Finance business to elevate impact investments as a credible new approach for investors. Under her leadership, Social Finance published seminal research, made proprietary investments in impact funds, structured and distributed impact investments to clients (such as the Global Health Investment Fund), and engaged J.P. Morgan employees worldwide in both voluntary and fee-based impact investment programs.

Christina has consulted for Ashoka (2006-07), served on the Advisory Board for the Center for Financial Inclusion, and currently sits on the Board of BRAC USA. She earned a MSc in Economics from the London School of Economics, a MA in International Affairs from George Washington University, and a BA in Sociology from University of California, Los Angeles.
SPEAKERS & DISCUSSION LEADERS

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 over $200 million into 330+ 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, and the Board of the CAHEC Capital Loan Fund. 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.

Dr. Molly Morse, CEO and Co-founder, Mango Materials

Mango Materials is a San Francisco Bay Area-based start-up company that uses methane gas to feed bacteria that manufacture a biopolymer.

Molly received her Ph.D. in Civil & Environmental Engineering—with an emphasis on anaerobic biodegradation of biocomposites for the building industry—from Stanford University, and her B.S. in Civil and Environmental Engineering from Cornell University.

Dr. Morse has contributed to multiple patents, publications and presentations. Along with other Mango Materials team members, she is currently working to up-scale the technology of using methane gas to produce environmentally friendly materials.

Rehana Nathoo, Vice President, Social Innovation, Case Foundation

Rehana joined the Case Foundation in 2016 as part of the Social Innovation team. Rehana serves as Vice President of Social Innovation, leading the Foundation’s efforts around Impact Investing. Previously, Rehana worked at the Bank of New York Mellon to help design the firm’s Social Finance program. She worked closely with the Wealth Management business to build internal expertise around Social Finance, and engage clients on this topic. While at BNY Mellon, Rehana also created a prototype for the firm’s first Impact Investment Fund.

Prior to joining BNY Mellon, Rehana was a Program Associate at The Rockefeller Foundation, working on program initiatives that pertain broadly to economic development and innovative finance, with a specific focus on impact investing.

Rehana also supported the Global Clearinghouse for Development Finance and the UN Capital Development Fund (UNCDF) as an Assistant Director, working to utilize project finance in strengthening domestic financial institutions in East Africa.

Rehana recently served as an Assistant Adjunct Faculty member at the Robert F. Wagner Graduate School of Public Service at NYU, teaching on topics related to CSR and Social Finance. Rehana holds a Bachelor of Arts with Honors degree in Political Science from Queen’s University, as well as a Master of Arts in Development Economics and Foreign Policy Analysis from the John C. Whitehead School of Diplomacy.
CINDY NAWILLIS, Director of Investor Relations and Operations, SunFunder

Cindy Nawilis joined SunFunder in 2012 and is now Director of Investor Relations and Operations, managing investor relationships and operations for the company’s private debt offerings. SunFunder is a specialist solar finance company that unlocks capital for off-grid and grid deficit solar projects in emerging markets and bridges the funding gap between investors with money and solar companies that need debt financing.

Prior to SunFunder, Cindy was based in Indonesia as Project and Communications Officer at Kopernik, where she managed projects distributing ceramic water filters and biomass cookstoves with local NGO partners to remote villages in Indonesia and India. Cindy has a B.A. with honors in International Relations from New York University and is a M.B.A. candidate at Shidler College of Business in University of Hawai‘i Manoa.

EILEEN NEELY, Director of Capital Innovation, Living Cities

Eileen Neely joined Living Cities in December 2012 as the Associate Director of Capital Innovation, and was promoted to the position of Director of Capital Innovation in May 2014. Living Cities is a collaboration of 18 major foundations and financial institutions that invests in revitalizing America’s cities.

Eileen leads a team that explores ways that private capital can better be used to positively impact the lives of low-income people and develops impact investment initiatives in low-income communities across the US. She manages the Living Cities Catalyst Fund, named to the ImpactAssets 50 list of funds for five consecutive years, and the newly formed Blended Catalyst Fund. The Catalyst Fund and Blended Catalyst Fund have a broad mandate, investing in areas such as equitable transit-oriented development and in new approaches such as Pay for Success.

Prior to joining Living Cities, she was the Director of Strategic Planning at the District of Columbia Housing Authority. In this position, Eileen oversaw the development, implementation and measurement of the Agency’s Strategic Plan and Moving to Work Plan. Previously Eileen was the Chief Operating Officer of the Fresno Housing Authority in Fresno, California. Eileen assisted the Executive Director in the transformation of the Housing Authority -- changing the corporate culture, establishing a broader role within the community, modernizing business practices, tightening financial controls, and expanding their programs to serve more low- and moderate-income families. She was responsible for all the internal operations of the Housing Authority, including Accounting and Finance, Information Technology, Human Resources, and Communications and Public Relations. Eileen has her Master’s Degree in Economics from Carnegie Mellon University in Pittsburgh, PA, and her Bachelor’s Degree in Mathematics and Economics from Hiram College in Hiram, OH.

DAVID NICOLA, Founder and CEO, Blackdirt Capital

David J. Nicola is the Founder of Blackdirt Capital, a firm focused on identifying and executing real asset and value chain based investment strategies in the U.S. sustainable agriculture sector. David serves as the Managing Principal for the Gratitude Farmland Fund, a land-based fund that invests in undervalued farmland that will support and benefit from the growing grassfed agriculture sector. David has 14 years of experience in farmland investing, portfolio management, credit trading, and private equity investing.

Prior to founding Blackdirt Capital, David served as a Portfolio Manager and Trader at BlueMountain Capital Management, a Director of Investments at a CT-based family office focused on food and agriculture, and an Investment Banking Analyst at Citigroup. David holds an M.B.A. from Duke University’s Fuqua School of Business and a B.S. from Cornell University’s College of Agriculture & Life Sciences.
TRACY PALANDJIAN, CEO and Co-Founder, Social Finance

Tracy is Co-Founder and Chief Executive Officer of Social Finance, a nonprofit organization which is leading the development of Pay for Success financing and Social Impact Bonds, an innovative public-private partnership that mobilizes capital to drive social progress.

For more than a decade, Tracy has committed to building a more impactful nonprofit sector by re-imagining the role of the capital markets in enabling social progress. Inspired by Social Finance UK, Tracy co-founded Social Finance US in January 2011 to develop the Social Impact Bond and Pay for Success model in the United States. Prior to Social Finance, Tracy was a Managing Director for 11 years at The Parthenon Group where she established and led the Nonprofit Practice and worked with foundations and NGOs to accomplish their missions in the US and globally. Tracy also worked at Wellington Management Co. and McKinsey & Co.

Tracy is co-author of Investing for Impact: Case Studies Across Asset Classes. She is Vice-Chair of the U.S. National Advisory Board to the Global Impact Investment Steering Group (previously the G8 Taskforce). She is a member of the Board of Overseers at Harvard University, and serves on the boards of Facing History and Ourselves and the Surdna Foundation. She is also a Director of Affiliated Managers Group (NYSE: AMG). Tracy is a frequent speaker and writer on impact investing and social innovation, having been covered in The Wall Street Journal, Atlantic, Economist, Forbes, and New York Times. A native of Hong Kong, Tracy is fluent in Cantonese and Mandarin. She graduated magna cum laude from Harvard College, with a B.A. in Economics, and holds an M.B.A. with high distinction from Harvard Business School where she was a Baker Scholar.

AMIE PATEL, Principal, Elevar Equity

Amie Patel is a Principal with Elevar Equity where she will be responsible for strategy, business development. Elevar Equity invests in transformative and scalable businesses focused on customers in low income communities primarily in India and Latin America. The Elevar Method of investing has democratized the provision of essential services for over 20 million low income customers, catalyzed billions of dollars of capital into 25+ companies led by world-class entrepreneurs and generated outstanding returns for investors.

Prior to joining Elevar, Amie was a Vice President with Goldman Sachs Asset Management which she joined through the acquisition of Imprint Capital. At Goldman and Imprint she focused on the firm’s ESG and impact investing capabilities within the emerging markets.

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.

Amie holds an M.B.A. from Georgetown University and a B.S. in Business Administration from Washington University in St. Louis, MO.
SPEAKERS & DISCUSSION LEADERS
Speakers & Committee Members

ANASTASIA COLE PLAKIAS, Founding Partner, Brooklyn Grange Rooftop Farm

A native New Yorker, Anastasia Cole Plakias was born-and-raised in the West Village, where her experience gardening was limited to growing lima beans on her sixth floor apartment windowsill. After spending four years fleeing honeybees in abject fear on the campus of Vassar College, Anastasia graduated with a bachelor's degree in English, a respectable freelance writing resume, and a total lack of fundamental skills. Following her appetite to the world of restaurants, she spent the next several years in the Executive Offices of the Batali & Bastianich Hospitality Group. In 2009, Anastasia made the decision to leave the hospitality world to pursue her dream of making a positive impact on our food and farming systems. It was then that she met her business partners and began ascending a steep learning curve as a farm operator.

As Founding Partner of Brooklyn Grange Rooftop Farm, the leading green roof farming business in the US, Anastasia has worn many hats over the years: she developed the farm's Events program, ran the Sales department, and continues to manage its Communications and External Affairs, focusing on creating strong and meaningful connections between the farm and the communities it serves. She Co-Founded the farm's sister non-profit organization, City Growers, for whom she continues to serve as an Advisory Board Member. Her book, The Farm on the Roof: What Brooklyn Grange Taught Us About Entrepreneurship, Community, and Growing a Sustainable Business, came out in April 2016. Anastasia's passion for educating urbanites about food, farming, and entrepreneurship is outweighed only by her penchant for telling longwinded stories featuring obscure vegetable trivia.

CONOR PLATT, Co-founding CEO and CIO of Etho Capital, Founder and CIO of Confluence Capital Management,

Confluence Capital Management runs a private investment partnership, Confluence Capital, LP.

Previously, Mr. Platt worked at Brown Brothers Harriman on the Portfolio Strategy team upon earning his MBA from the Tepper School of Business at Carnegie Mellon University. He was an analyst at Morgan Stanley in New York after receiving his B.S. in Finance with honors at Carnegie Mellon University.

WILL POOLE, Managing Partner, Capria Ventures and Unitus Seed Fund

Will Poole is a serial entrepreneur, multinational corporate executive, and venture investor. He recently co-founded Unitus Seed Fund, the leading impact fund in India investing in businesses innovating for the masses, and Capria Accelerator, partnering with and investing in emerging fund managers in developing markets of Africa, Asia and Latin America.

Will co-founded and serves on the board of Bangalore-based Vidyanext, with a mission to change the way India learns.

Will serves on two nonprofit boards, Village Reach and Global Washington, and serves on the investment committee of Seattle-based W Fund.

In his technology career, Will was previously Chairman of NComputing, and was a Corporate Vice President at Microsoft where, during his 13-year tenure, he led several business lines, including the $13 billion Windows client business, and founded the company’s efforts to tailor products to the needs of low-income customers.

Will’s career started by founding two startups at the dawn of the PC era, working in the early days at Sun Microsystems, and pioneering e-commerce at eShop, which was acquired by Microsoft in 1996. Will advises Brown University and Western Governors University on technology. He received a Bachelor’s degree in Computer Science from Brown in 1983.
SPEAKERS & DISCUSSION LEADERS

Speakers & Committee Members

BARBARA RAHO, Private & Angel Investor; Managing Director, Golden Seeds

Barbara G. Raho is a private investor with a particular interest in retail, women-led ventures and the theater. Since 2007, she has been a Managing Director at Golden Seeds, a network of angel investors dedicated to investing in early stage companies that are founded and/or led by women. She was a founding employee, shareholder and board member of Urban Outfitters in 1976 and remained on the Board until 1989. Her corporate career was spent at W.R. Grace working in corporate finance and fixed-income portfolio management. Over the past 20 years, she has held various positions for small financial and retail businesses as a consultant, sales associate and some-time investor as well as working for non-profits particularly in support of victims of domestic violence.

In her not-for-profit work, Barbara has served on the Board of Managers of United Hospital in Port Chester, NY and the Rye YMCA Board of Directors and currently serves on two other non-profit boards, P.O.T.S. (Part of the Solution) and My Sisters' Place. Barbara's for-profit board work includes being a board observer for a private company, Lovesac, and an advisory board member for Sugarlift and Cisse Cocoa Co. She is a graduate of the University of Pennsylvania and has an MBA in Finance from the Wharton Graduate School of Business.

ELLEN REMMER, Senior Partner, The Philanthropic Initiative

Ellen Remmer is Senior Partner of The Philanthropic Initiative, a nonprofit strategic philanthropy consulting practice at the Boston Foundation that helps individuals, families, foundations, and companies increase the impact of their philanthropy. She served as President and CEO from 2007-2012. Since 1993, Ellen has worked with hundreds of donors to make their giving more effective and developed initiatives to grow high impact philanthropy in the U.S. and abroad. Recently, a number of these initiatives have been aimed at helping donors expand their impact through impact investing.


Ellen has been deeply involved in promoting women’s leadership in philanthropy and social change, and is a frequent writer and speaker on the topic. Ellen is on the board of the Remmer Family Foundation and Prosperity Catalyst, and is a member of the Oxfam America Leadership Council and the Women’s Philanthropy Institute Council.

CYNTHIA RINGO, Senior Partner of DBL Partners, and Managing Partner of the prior fund managed under DBL Investors


Ms. Ringo was formerly a Managing Director of VantagePoint Venture Partners where she was Group Leader of the Communications, Systems, Internet and Media Practice. Ms. Ringo also serves as an advisor to several organizations including: the NVCA Diversity Task Force, SVForum, a Silicon Valley leadership forum, Astia, supporting women-led entrepreneurs, and is a member of the Emeritus Board, Watermark.

Ms. Ringo received a BS in Legal Systems from Georgia State University and a JD from Emory University School of Law.
SPEAKERS & DISCUSSION LEADERS
Speakers & Committee Members

IMOGEN ROSE-SMITH, Staff Writer, Institutional Investor

An award-winning journalist and senior writer with Institutional Investor magazine, Imogen has over 15 years of experience covering institutional asset management. Her areas of expertise include: institutional investors, hedge funds, venture capital, impact investing, government policy and long term asset ownership.

Imogen is a 2015 fellow of the Office of the Chief Investment Officer, University of California Regents, where she worked on ESG integration and sustainable investment issues. Imogen serves on the Advisory Board of Girls Who Invest, a not-for-profit focused on increasing the number of women in investment management roles. Imogen is a member of the content planning committee for High Water Women’s annual Impact Investment Symposium.

Imogen has also served as a consultant to the Robert F Kennedy Center for Justice and Human Rights on its Compass conference program, a high-level conference aimed at engaging asset owners in issues relating to the environment, social responsibility and corporate governance. She represented the RFK Center in negotiations with the Department of Labor with regards to the November 2015 DOL guidance concerning impact investing and shareholder engagement.

KERRY RUPP, General Partner, True Wealth Ventures

Kerry Rupp is a General Partner at True Wealth Ventures, a new early-stage venture capital fund investing in women-led businesses in the sustainable consumer and consumer health sectors.

In addition, Kerry provides innovation and strategy consulting through her DisRuppt practice, leveraging over 20 years’ experience launching and growing startups and new lines of business.

Kerry is also a nationally-certified instructor for the National Science Foundation’s Innovation Corps (I-Corps) program. She serves as a mentor at Capital Factory, Galvanize, and International Accelerator and is on the Advisory Panel of the Texas Health Catalyst program at Dell Medical School.

Previously, Kerry was CEO at DreamIt, a Top Ten US startup accelerator and early-stage venture fund, where she was directly involved with the launch of over 150 companies. During her 5-year tenure with DreamIt, she grew its programs to five cities, raised a $15+M follow-on fund.

Before DreamIt, Kerry was herself the founder of an online travel service, Holiday Golightly, which organized unique group travel excursions for women. She has held Vice President level positions at AllRecipes.com, Jobster, Classmates.com and LexisNexis.

Kerry began her career as a consultant with McKinsey and Andersen Consulting (now Accenture). Kerry holds an MBA from Harvard Business School and a BA in Biology from Duke University. Kerry serves on the board of Texas 4000 for Cancer, the advisory board for Texas Enactus, and on the leadership teams of Women@Austin, The Angel Forum, and the Austin chapters of Harvard Business School Alumni Club and the DukeGEN Global Entrepreneurship Network.
SPEAKERS & DISCUSSION LEADERS

Speakers & Committee Members

KRISTINA RÜTER, Head of Research, oekom research AG

University degree in environmental engineering. Studies at the Technical Universities of Hamburg-Harburg and Berlin, Germany, and at the University of Aveiro, Portugal. Worked in research projects at the Institute of Environmental Technology of the Technical University Berlin, the Leibniz-Institute of Freshwater Ecology and Inland Fisheries in Berlin and at a state-run water and wastewater company in Recife, Brazil.

Starting with oekom research as an analyst in 2003, she became team leader of a research team in 2007, shaping the agency’s ESG research on extractive industries and the energy sector as well as the assessment of climate risks and controversial environmental practices. As Director Research Methodology from 2013 until 2016, Kristina Rüter led the further development of the methodology of the oekom Corporate Rating and developed the methodologies of new products including the oekom Sustainability Bond Rating, the Second Party Opinions, the oekom Carbon Risk Rating and Fossil Fuel Screening as well as client-specific solutions for thematic evaluations and integration.

Since 2016 Kristina Rüter is Head of Research, leading the core business of the agency with its more than 50 analysts. In addition, Ms Rüter is a member of the Technical Review Committee of the Global Initiative for Sustainability Ratings (GISR) and a member of the Jury of PWC’s Building Public Trust Award.

ASHLEY SCHULTEN, Director, BlackRock

Ashley Schulten, Director, is the Head of Climate Solutions, Fixed Income, within the Portfolio Solutions Group. Ms. Schulten is a portfolio manager on global green and socially responsible mandates and leads the coordination of the BlackRock firmwide Green Bond effort. She partners with Blackrock’s Impact Investing Group and Investment Stewardship Group to bring ESG and climate risk integration strategies to the Portfolio Management team. Previous to BlackRock, Ms. Schulten spent 20 years as a sell side interest rate trader. Ms. Schulten earned a BA in Political Science from Vanderbilt University in 1992. She serves on the Executive Committee of Green Bond Principles and is on the Board of the Mianus River Gorge, the first Nature Conservancy land project.

DEBRA SCHWARTZ, Managing Director, MacArthur Foundation

Debra serves on the Executive Leadership Team at MacArthur, which has dedicated $500 million of its assets to impact investing. Debra’s group serves as a Foundation-wide resource, and engages deeply with selected teams to help develop strategy and devise impact investments that advance key goals. A former investment banker, Debra also leads the creation of new impact investment products and platforms that foster easier, more efficient, and more productive connections among multiple impact investors and social sector organizations.

She joined MacArthur in 1995, having worked at a Chicago-based child welfare agency. A frequent speaker and guest lecturer, Debra has also served on the United States Treasury Department Community Development Advisory Board and the founding board for the Mission Investors Exchange.

Debra earned a Master's degree from the Kellogg School of Management at Northwestern University and a Bachelor's degree from Yale College, summa cum laude.
SPEAKERS & DISCUSSION LEADERS
Speakers & Committee Members

LISA SEBESTA, Founder and Managing Partner, Fresh Source Capital, General Partner, Fresh Source Capital Fund
Lisa is on the leadership team of Slow Money Boston and was member of Sprout Lenders, LLC.
Prior to Fresh Source, Lisa served as a consultant and Senior Investor to the Fair Food Fund. She also spent 15 years as an equity analyst and portfolio manager for Boston-based firms Batterymarch Financial Management and Boston Advisors.
Lisa holds an undergraduate degree from Holy Cross and earned her Masters at the Fletcher School at Tufts University. Lisa is a CFA Charterholder and member of the Boston Security Analysts Society. Lisa is Managing Partner at Fresh Source Capital, LLC, and a General Partner in Fresh Source Capital Fund 1. She is on the leadership team of Slow Money Boston and was member of Sprout Lenders, LLC.

JAMIE SILVER, Managing Director, Mariner Investment Group
Ms. Silver joined Mariner in 2004 and is a Managing Director within the Proprietary Trading and Risk Management Team and a member of the Management Committee. She works with the CIO in managing the Firm’s flagship multi-strategy fund and is also responsible for managing special projects for Mariner’s strategic partners. Additionally, she spearheads Mariner’s ESG and Impact initiative.
Ms. Silver was formerly a structuring and marketing associate in the Alternative Investments Team with JPMorgan’s Private Bank. Prior to joining the Alternative Investments Team in 2000, Ms. Silver was a Credit analyst for Chase Manhattan Private Bank. She successfully completed the Chase Investment Banking Credit analyst Program. Ms. Silver received a B.S. / B.A. concentrating in Finance and Accounting from American University.

CANDACE SMITH, Managing Director of Risk, MicroVest
Candace is responsible for the risk management of MicroVest and the funds, including portfolio risk management. Ms. Smith joined MicroVest in 2005 as CFO, transitioning to COO and then to her current role in December 2014. Prior to joining MicroVest in 2005, Ms. Smith advised clients such as the Inter-American Development Bank, Calvert Social Investment Foundation, and Corporacion para el Financiamiento de Infraestructura, among others, on due diligence, credit evaluation and other matters.
As Chief Operating Officer for Triodos PV Partners, she oversaw a $50 million joint business development and equity investment program promoting solar electric services in developing countries. Previously, Ms. Smith served as Senior Credit & Portfolio Officer at the Inter-American Investment Corporation, responsible for developing and maintaining corporate credit risk guidelines and oversight of $400 million portfolio throughout Latin America and the Caribbean. She began her career as a corporate lending officer with former Continental Illinois National Bank. Ms. Smith holds a Masters in International Management from The American Graduate School of International Management at Glendale, AZ and a dual major Bachelor of Arts degree in Spanish and Political Science from the University of North Carolina at Chapel Hill.
ANNA SNIDER, Head of Due Diligence, Global Wealth and Investment Management CIO Office, Merrill Lynch

Anna Snider is a Managing Director and Head of Due Diligence for the Chief Investment Office within Global Wealth & Investment Management (GWIM), a division of Bank of America Corporation. In this role, Anna is responsible for manager research across all asset classes for the wealth management businesses. She also defines and executes investment strategies focusing on impact strategy research, thought leadership and investment implementation.

Prior to this role, Anna was part of 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. She was also a senior analyst in the risk management division at U.S. Trust. Anna offers many 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. Anna graduated from Connecticut College. She holds the Chartered Alternative Investment AnalystSM (CAIASM) designation. Anna serves as chair of the board for High Water Women, a foundation based in New York City.

LAURIE J. SPENGLER, President and CEO, Enclude

Enclude is a global advisory firm dedicated to building inclusive, sustainable and prosperous local economies. The firm delivers integrated capacity (consulting) and capital (transaction) solutions to financial institutions, business support organisations, private-sector companies, funders and investors. Enclude works with clients and projects that contribute to the real economy. The firm’s focus is on meeting the needs of entrepreneurs, small & growing enterprises and un(der)served households - the economic engines underpinning inclusive and sustainable markets. Enclude specializes in areas of inclusive finance, technology-enabled platforms and distribution channels, clean and renewable energy, and sustainable agriculture.

Ms. Spengler has 25+ years’ experience in strategy and transaction services, specifically capital raising, M&A, and private equity transactions. She has developed a particular expertise in structuring and launching investment vehicles that align different types of capital to allow operating enterprises, financial institutions and funds to generate positive social, environmental and development outcomes while delivering appropriate financial returns. Previously, Ms. Spengler was founder and CEO of Central European Advisory Group. She also worked as an attorney White & Case. She has a JD from Harvard University and an undergraduate degree from Stanford University. Among her active board engagements is the Executive Committee of the Aspen Network of Development Entrepreneurs, the CDC Group and the UK National Advisory Board on Impact Investing. Ms Spengler is also a member of the Council on Foreign Relations.

TAJ TABASSOOM, Associate, SeaChange Capital Partners

Taj Tabassoom joined SeaChange Capital Partners in the spring of 2016 as an Associate responsible for the organization’s credit portfolio. In her role, Taj manages Contact Fund, a private, mission-driven loan fund that deploys capital to high-impact organizations, and The New York Pooled PRI Fund, a collective effort by leading foundations to make program-related investments.

Before joining SeaChange, Taj worked at JPMorgan Chase in their credit risk and emerging markets groups. As a former Tamer Social Enterprise Fellow, Taj worked with a fintech startup to build the organization’s business strategy. She has also completed consultancies for several nonprofits, most recently with Women’s World Banking, where she advised the organization on the launching of micropension products for low income women in India. Taj began her career working at the fund of funds, Basel Asset Management. She holds a Master of International Affairs in Economic Development from Columbia University and a Bachelor of Business Administration in Finance from Baruch College.
JOAN TRANT, Director of Marketing and Impact, TriLinc Global

Joan Trant is the Director of Marketing and Impact and a key member of the TriLinc Global Executive Management team, a member of the Investment Committee and of the Sustainability and Impact Committee. Her primary responsibilities include accelerating fund sales through specific channels, helping build the TriLinc brand, and leading the Company’s efforts to support the continued development of the impact investing industry.

Prior to joining TriLinc Global, Joan launched and was Executive Director of the International Association of Microfinance Investors (IAMFI). IAMFI’s Limited Partner members’ microfinance commitments/investments totaled $780 million, and General Partner members managed an aggregate portfolio of $1.84 billion. IAMFI led the microfinance investment industry with proprietary research, contributions to third party publications, educational and networking meetings, tailored member services and consensus-building for investor best practices.

Prior to IAMFI, Joan was Deputy Executive Director of The Resource Foundation, supporting community-building programs in 20 Latin American countries, benefiting annually 4.6 million underserved children, youths, women and men. Previously, Joan spent 15 years in the financial services industry, holding international sales, financial advisory and operations management positions at Bankers Trust and Citibank, with direct experience in the Spanish, Mexican and Argentine markets. She oversaw a combined portfolio of $225 million in client assets. Joan is a graduate of Columbia University’s Graduate School of Business Executive Level Nonprofit Management Certification Program. She graduated magna cum laude with a B.S. degree from Georgetown University.

KATHLEEN UTECHT, Managing Partner, Core Innovation Capital

Core Innovation Capital is a leading venture capital firm investing in financial services companies empowering everyday Americans. Portfolio companies include Oportun, Mirador, CoverHound, and TIO Networks.

As a managing partner, angel investor – and earlier as an investor with Comcast Ventures – Kat is passionate about investing in market-based solutions for meaningful world issues.

Prior to Comcast Ventures, Kat was CEO of Green Rock Entertainment, a commerce company acquired by a private equity firm in 2009. In 2008, her achievements as an entrepreneur were honored by Ernst & Young, where she continues to mentor and serve as a judge.

Kat began her career in financial services, both as a middle-market investment banker for Raymond James and a graduate of General Electric Capital’s Financial Management Program. Kat’s insights to the financial services industry are cited regularly by numerous publications including Forbes, Inc, and the Wall Street Journal. She is a mentor to and board member of a wide range of companies at all stages of development, spanning accelerators to Fortune 500 boards, and from SXSW to Wharton. Kat also sits on the board of TechGirlz, empowering girls to be future technology leaders.
ANNA-MARIE WASCHER, Ceo and Founding Partner, Flat World Partners

Anna-Marie Wascher previously served as a Director at Cantor Fitzgerald as a senior member of the Capital Introduction team. She launched Cantor’s West Coast Capital Introduction Program as well as leading an initiative to support the capital development of minority and women run funds. She is a venture partner to Aera, a venture fund investing in high growth early stage ventures defined by both purpose and profit. She has worked as a member of investment teams for several family offices in the US and Europe. Anna-Marie started her career with Accenture as a financial consultant in their London investment banking practice as well as supported Accenture’s Socially Responsible business arm. In 2009 Anna-Marie left Accenture to become Co-founder and COO of Malaika For Life, a non-profit based in Tanzania.

Anna-Marie holds an MBA from Boston College, graduating with honors with a focus in Corporate Finance and a Bachelor of Business Administration degree (Cum Laude) with a dual major in International Finance and Entrepreneurship from University of Miami.

Anna-Marie is a board member of the Michael J Fox Foundation Young Professionals group and a Young Collectors Committee Member of Henry Street Settlement, as well as a member of the Milken Young Leaders Circle.

AMY ROSEN WILDSTEIN, Managing Partner, Springboard Growth Capital

Ms. Wildstein has over twenty years of direct investment experience. She started her career at the Blackstone Group, working on principal investments as well as mergers & acquisitions. Subsequently, she joined Morgan Stanley Capital Partners where she evaluated and structured investments for the firm’s $2.0 billion investment fund, focusing on buyouts and growth equity investments across a range of industries, including consumer, media and healthcare.

Ms. Wildstein was a founder of Solera Capital, an investment fund launched in 1999 by a team of all women. She was involved with fund formation, capital raising and the development of the Fund’s investment strategy. In 2001, Ms. Wildstein co-founded Boldcap Ventures, an investment club, comprised of all women investors in and around the New York area. Ms. Wildstein has served as Fund Manager of Boldcap since its formation, focusing on early to mid-stage companies in the media/technology and life sciences industries. Ms. Wildstein has played key roles in developing and executing financing strategies for portfolio companies, including public equity and debt financings, bank facilities, and private equity placements. She is also experienced in managing and monitoring existing portfolio companies and has served on the board of directors of companies in the consumer, healthcare, information technology, and media sectors.

Ms. Wildstein has served on the National Advisory Board of Springboard Enterprises since 2004 and has been involved as a volunteer, screening business plans and coaching companies for Springboard Enterprises for over a decade. She is also a member of the NY Fashion Tech Lab Expert Network. Ms. Wildstein received a Bachelor of Business Administration with Distinction from the University of Michigan.
SPEAKERS & DISCUSSION LEADERS

NATE YOHANNES, Senior Advisor, U.S. Small Business Administration

Mr. Yohannes is an experienced professional in private equity/venture capital, high growth innovation, business development and regulatory/legal affairs. Mr. Yohannes was appointed by President Barack H. Obama to serve in his administration as the Senior Advisor to the Chief for the Office of Investment and Innovation at the U.S. Small Business Administration (SBA). As the Senior Advisor, Mr. Yohannes is a member of the leadership team managing the Small Business Investment Company, the world’s largest private equity/venture capital fund investing in the lower middle market. With over $25.2 billion in AUM and authorization to invest $4 billion annually. In addition, Mr. Yohannes helps manage the Small Business Innovation Research program, a $2.5 billion per year high growth technology grant for lower middle market businesses to engage in Federal Research and Development (R&D). Concurrently to Mr. Yohannes’ position at the SBA, he was a Team Leader for the U.S. Department of Treasury’s Community Development Institution Fund -- where he helped distribute over $180 million in financial assistance to funds investing in underrepresented communities across the United States.

Mr. Yohannes is a member of the White House Financial Technology Committee and the White House Business Council. In addition, Mr. Yohannes sits on President Obama’s Broadband Opportunity Council, a multi-agency team responsible for providing counsel to President Obama on how to advance the United States as the most broadband accessible country in the world. Mr. Yohannes regularly works with staff at the Domestic Policy Council, Office of Science and Technology Policy, Innovation Cohort and National Economic Council on issues that directly affect high growth small businesses across the country.

Prior to joining the Obama Administration, Mr. Yohannes was the Vice President - Associate General Counsel at the Money Management Institute (MMI), where he represented $4 trillion dollars of the global wealth management industry. Earlier in his career he clerked for Chief Justice Paula Feroleto - New York State Supreme Court 8th District. Mr. Yohannes received his JD from the University at Buffalo Law School where he was a Barbara and Thomas Wolfe Fellow for Human Rights and a BA from SUNY Geneseo (New York State’s Public Honors College) and is a member of the New York State Bar.

PATRICIA MILLER ZOLLAR, Managing Director, Neuberger Berman, Partner, Neuberger Berman Alternatives

Within the alternatives business, Ms. Zollar is responsible for leading the NorthBound Emerging Managers Private Equity Fund, a private equity fund which invests in private equity partnership interests and co-investments, and managing a bespoke Co-Investment Separate Account.

Before the management buyout of Neuberger, Ms. Zollar co-headed and co-founded the Lehman Brothers Partnership Solutions Group (“PSG”), a Wall Street business focused on developing strategic opportunities with women- and minority owned financial services firms. The innovation of the Partnership Solutions Group was chronicled in a case study for the Harvard Business School. Before rejoining Lehman Brothers in 2004, Ms. Zollar was a vice president in the Asset Management Division of Goldman Sachs.

Ms. Zollar began her career as a Certified Public Accountant in the Audit Division of Deloitte & Touche. She received her MBA from Harvard Business School and her B.S., with highest distinction, from North Carolina A&T State University, where she formerly served as Chairperson of the Board of Trustees and is the recipient of an honorary Doctorate degree. Ms. Zollar is a board member of the National Association of Investment Companies and The Apollo Theater and also a member of the Executive Leadership Council.