Valerie Rockefeller, Trustee & Chair, Rockefeller Brothers Fund

Valerie Rockefeller chairs the board of the Rockefeller Brothers Fund, a private foundation advancing social change that contributes to a more just, sustainable, and peaceful world. Her professional background is as a middle school special education teacher for adolescents with learning differences and emotional disabilities. She began her teaching career at Central Park East Secondary School in East Harlem, New York, and also taught in Australia.

Ms. Rockefeller has a M.Ed. in Special Education from Bank Street College of Education and a MAT in secondary Social Studies from Columbia University Teachers College. She majored in International Relations at Stanford University, and worked as a confidential assistant to Secretary Richard Riley at the U.S. Department of Education during the first Clinton administration. She serves as a trustee of the Asian Cultural Council, Columbia University Teachers College, D.C. Preparatory Academy, Greenwich Academy, the Gilder Lehrman Institute of American History, and Rockefeller Philanthropy Advisors. Ms. Rockefeller was a trustee of Spelman College, and is a member of the Council on Foreign Relations.

Ms. Rockefeller lives with her daughters Percy and Lucy, her son, Davis, and their dog Wrigley in Old Greenwich, Connecticut.

Debra Schwartz, Managing Director of Impact Investments, Executive Leadership Team, MacArthur Foundation

Debra is the Managing Director of Impact Investments and 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.

Debra 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.
Deval Patrick, Managing Director, Bain Capital Double Impact

Originally from the South Side of Chicago, Patrick came to Massachusetts at 14, when he was awarded a scholarship to Milton Academy through the Boston-based organization A Better Chance. After Harvard College and Harvard Law School, he clerked for a federal appellate judge and then launched a career as an attorney and business executive, becoming partner at two Boston law firms and a senior executive at Texaco and Coca-Cola.

In 1994, President Clinton appointed Patrick to the nation’s top civil rights post, Assistant Attorney General for Civil Rights. In 2006, in his first bid for public office, he became the state’s first African-American governor. In his two terms as Governor, Patrick oversaw the expansion of affordable health care to more than 98 percent of state residents, launched initiatives stimulating clean energy and biotechnology, won a national Race to the Top grant, and steered the state out of recession to a 25-year high in employment.

Patrick currently serves as a Managing Director of Bain Capital Double Impact, where he focuses on investments that deliver both a competitive financial return and significant positive social impact. He is a Rockefeller Fellow, a Crown Fellow of the Aspen Institute, and the author of two books, *A Reason to Believe: Lessons from an Improbable Life* and *Faith in the Dream: A Call to the Nation to Reclaim American Values*.

Imogen Rose-Smith, Investment Fellow, University of California, Office of the Chief Investment Officer to the Regents

Imogen is an Investment Fellow with the University of California in the Office of the Chief Investment Officer to the UC Regents. As a fellow she focuses on sustainability investing. Reporting directly to the CIO, helps the $110 billion investment office craft and execute its innovative sustainable investment approach. Prior to joining the UC, Imogen had more than 15 years experience as a financial journalist most recently as an award winning senior writer for Institutional Investor magazine.

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 2015, 2016 and 2017 content planning committees for High Water Women’s annual Investing for Impact Symposium. From 2013 to 2015 she 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.

Imogen is based in New York, she lives in Fort Greene, Brooklyn with her partner Pierre and her dog George. Sometimes she is funny on Twitter.
Monique Aiken, Vice President, Programs, Mission Investors Exchange

Monique is Vice President, Programs at Mission Investors Exchange (MIE), the leading impact investing network for foundations dedicated to deploying capital for social and environmental change.

Prior to joining MIE, Monique was a Director at Tideline where her energies were centered on client and project management as well as business development. Her previous positions include Project Manager at the Clinton Foundation for No Ceilings: The Full Participation Project, a women’s empowerment initiative led by Secretary Clinton and, before that, Business Development Manager for the Clinton Global Initiative. Previously, Monique was a VP in the Commodity Derivatives Sales group at Deutsche Bank where she managed client relationships with Oil and Gas (E&P), Utility, and Consumer Products companies in both the United States and Latin America.

Earlier in her career, Monique worked for Citigroup in both the US and European Debt Capital Markets groups and as an Analyst at Bank of America in the Credit Products group. Monique holds a BSc in Foreign Service from Georgetown University and an MBA from the NYU Stern School of Business.

Laura Albarracin, Senior Analyst, oekom research AG

Laura Albarracin is a senior analyst at oekom research AG, one of the world’s leading rating agencies in the area of sustainable investment. She joined oekom in 2013, working as an ESG analyst for the financial sector. She is also a member of oekom’s Methodology Board, where she supports the development of the agency’s research methodology.

Most recently, Laura collaborated in the development of oekom’s Sustainability Solutions Assessment, a tool which provides investors with detailed information and data regarding the impact of a company’s product and services portfolio towards the UN Sustainable Development Goals (SDGs). Laura holds an MA in Political Science from Rutgers University and a BA in Political Science and Public Administration from the University of Konstanz in Germany.

Jonathan Asmis, Co-Founder, Landed Inc.

Jonathan Asmis is the Chief Executive Officer at Landed, which runs down payment assistance programs for educators across the US. Prior to working at Landed, Jonathan worked as a strategy consultant at Accenture, Inc. where he helped a mix of public and private clients to address critical organizational needs. In one instance, Jonathan led Accenture’s work with Canadian Immigration Employment Councils, developing the structure for social impact bonds used for immigrant settlement services. For his work on urban issues in Toronto, Jonathan was selected as a CivicAction fellow in 2014.

Jonathan completed his MBA as an Arjay Miller Scholar from the Stanford Graduate School of Business, where he developed the basic framework for Landed. Jonathan also holds a bachelor’s degree in Engineering Science (Biomedical focus) and a master’s degree in Industrial Engineering from the University of Toronto.
David Bank, Editor & CEO, ImpactAlpha

David Bank is the CEO and editor of ImpactAlpha, “Investment news for a sustainable edge.” ImpactAlpha serves the marketplace of impact investors and entrepreneurs who generate financial returns through creation of social and environmental value. The Brief, ImpactAlpha’s daily newsletter, has become the go-to source for a growing community of “agents of impact.” ImpactAlpha’s ImpactSpace database, aka “CrunchBase for impact,” is an open-data directory of ventures, funds, deals and people.

As a reporter at the Wall Street Journal, David covered software, cybersecurity and philanthropy. His book, “Breaking Windows” (Free Press, 2001), about Microsoft’s rise and fall, was named one of the best business books of the year by Harvard Business Review and Amazon. 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, President, Calvert Investments

Vicki Benjamin is president of Calvert Investments, “Calvert”, post-sale of its assets to Eaton Vance. Prior to the transaction, Vicki was Calvert’s chief operating and financial officer. Vicki is a passionate advocate for sustainability and during her tenure at Calvert participated in the construction of the Calvert Research System, new product development and academic research. 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.

Driianne Benner, CFA, Managing Director, Appomattox Advisory

Driianne Benner has over 30 years’ experience in investment management. At Appomattox, she is responsible for client service and business development. Previously, she was Global Marketing Director at Cadogan Management where she was responsible for overseeing firm-wide marketing and client communications for institutional clients. Prior to joining Cadogan, she spent ten years, most recently as a Managing Director, at U.S. Trust Company, where she supported institutional clients and consultants as well as developed and led client and marketing initiatives.

Previously she worked at Paribas Asset Management, a global asset management firm, as portfolio manager and analyst in quantitative strategies and subsequently built the institutional client and consultant relations program servicing large U.S. institutional funds.

She earned a BA from Pennsylvania State University and attended graduate studies in international development at Cornell University. Driianne is a CFA charterholder and serves on the board and executive committee of CFA Society New York. Driianne is on the board and Investment Committee of the New York City Audubon Society; an Investment Committee member of the American Friends Service Committee and on the Finance/Investment Committee of the Oysterponds Historical Society.
SPEAKERS & DISCUSSION LEADERS
Speakers & Committee Members

Dana Bezarra, Senior Vice President, Heron Foundation

Dana K. Bezerra joined Heron in 2006. She is responsible for deal sourcing, identifying and developing relationships across a spectrum of investors, syndicating capital when possible, and cultivating opportunities to deploy the full range of Heron’s “toolbox” including grants, program related investments and market-rate mission related investments.

Prior to joining Heron, Ms. Bezerra was with Merrill Lynch in the Private Banking & Investment Group where she specialized in Philanthropy and Nonprofit Management.

Ms. Bezerra is currently on the Board of Capital Impact Partners, a $1B CDFI. She also serves on the steering committees for Mission Investors’ Exchange and Markets for Good, and as a reviewer for the Bill & Melinda Gates Foundation as part of its Grand Challenge Exploration Program.

Ms. Bezerra is a native Californian and earned a Bachelor of Science in Agricultural Business and Public Policy from Cal Poly, San Luis Obispo.

Suzanne Biegel, Founder, Catalyst at Large

Suzanne Biegel is founder of Catalyst at Large, and recently created an initiative to bring together investors with a gender lens, called Women Effect, which is now part of the Wharton Social Impact Initiative where Suzanne is Senior Gender Lens Investing Adviser.

Suzanne is an active impact investor and philanthropist. Her work as Catalyst at Large focuses on investing with a women and girls / gender lens, and her own portfolio is directed with a broader set of impact and gender lenses.

She was a founding board member of Confluence Philanthropy. She founded Women in Social Finance in London and co-founded the Values Based Investment group of Women Donors Network. She is a Catto fellow at The Aspen Institute. She is an active member of the Toniic/100% Impact Network. She serves on the investment committee of the Patient Capital Collaborative venture fund, which she co-founded in 2007.

Suzanne was previously Vice Chair of the Board of Liberty Hill Foundation. Suzanne began her career at IBM, and worked for two IBM-funded startups before building and growing an e-learning company to a successful exit in 1998.

She received the Beacon award for philanthropy and impact investing in the UK in 2015. She is a graduate of Wharton Business School at the University of Pennsylvania.

A native New Yorker, Suzanne has been based in London for the past 8 years.
SPEAKERS & DISCUSSION LEADERS

Speakers & Committee Members

Sara T. Brand, Founding General Partner, True Wealth Ventures

Sara is Founding General Partner at True Wealth Ventures, an early-stage venture capital fund investing in women-led businesses in consumer health and sustainable products and technologies.

Throughout her career, Sara has worked with and contributed to some of the top teams in the technology industry and has cultivated a diverse portfolio of leadership experiences including:

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

An active member of the entrepreneurial ecosystem to support gender diversity, Sara is a founding investor in the Rising Tide Fund, advisor to DivInc. and steering committee member of Women@Austin. She also serves the consumer health and sustainable consumer sectors as advisor to Texas Health Catalyst at the Dell Medical School, mentor for CleanTech Open and as an active speaker on the topic. 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. She also holds a BS in Mechanical Engineering from UT Austin where she serves on the Cockrell School of Engineering’s External Advisory Board and the Texas Health Catalyst Advisory Panel for UT’s new Dell Medical School to foster health technology innovations across industry, academia and community.

Emily Chasan, Sustainable Finance Brief Editor, Bloomberg

Emily Chasan is the editor of Bloomberg's weekly Sustainable Finance Brief. She writes about trends in corporate sustainability and corporate governance and sustainable, responsible and impact investment strategies.

Emily was previously a senior editor at The Wall Street Journal’s CFO Journal, and a senior correspondent at Reuters where she covered accounting, law, hedge funds, manufacturing, and the U.S. stock market. She led the wire service’s team of bankruptcy reporters during the financial crisis from 2008 to 2010.

Emily has won two Front Page Awards from the Newswomen’s Club of New York and in 2012 was named to the National Association of Corporate Directors’ “Directorship 100” list of people most influential on corporate boards of directors.

Emily graduated from Tufts University cum laude with a degree in Economics and International Relations. You can follow her on twitter @echasan.
Melissa Cheong, CIO, Zoma Capital

Melissa Cheong is the Chief Investment Officer at Zoma Capital, the private family office of Ben and Lucy Ana Walton, where she oversees the management of the family’s investment activities, employing a fully values-aligned investment strategy.

Prior to establishing Zoma Capital, Ms. Cheong held various positions working with family offices and within the financial services sector at organizations such as Treehouse Investments, Imprint Capital, Plainfield Asset Management, Metzler Bank and Deutsche Bank. Currently, she also serves as a member of the Investment Committee for Partners Group Impact Investments and is on the Advisory Board for Closed Loop Ventures, a Venture fund that invests in sustainable consumer goods, advance recycling technologies and services related to the circular economy.

Ms. Cheong also serves as a Board Member for Agora Partnerships, an organization that works with entrepreneurs to build businesses and provide resources that solve deep social and environmental challenges. She holds an MBA from Columbia Business School, New York and a Bachelor of Arts Degree in Political Science from the University of Chicago.

Moya Connelly, Vice President, Global Social Finance, Deutsche Bank

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.

Ron Cordes, Co-founder, Cordes Foundation

Ron Cordes has enjoyed a 30+ year career in the investment industry. He was a co-founder and CEO of AssetMark, a leading U.S. managed account platform with $30+ billion of AUM, co-authored “The Art of Investing” published by McGraw Hill, and was an Ernst & Young Entrepreneur of the Year. Since co-founding the Cordes Foundation in 2006 with his wife, Marty, Ron has focused on impact investing and social entrepreneurship and currently serves on the Boards of MicroVest, ImpactAssets, Fair Trade USA and the Social Impact Lab at Lynn University. His work in this area has been profiled in an array of publications including the New York Times, Barron’s, FastCompany, Forbes and FORTUNE.
Lisa Davis, Executive Director & Portfolio Manager, Impact Investing, PGIM Real Estate

Ms. Davis has 20 years of commercial real estate finance and development experience in philanthropic, nonprofit and for-profit organizations, and has focused on improving housing and economic conditions in low-income communities throughout her career. Ms. Davis is Portfolio Manager and Executive Director of Impact Investing at PGIM Real Estate, where she is leading the creation and implementation of an impact investing strategy on a traditional real estate private equity platform.

Previously, she was Director of Investor Relations and Specialty Originations at Pembrook Capital Management, where she raised capital from institutional real estate and impact investors. Prior to joining Pembrook, Ms. Davis served as a Program Officer at the Ford Foundation for 6 years, 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.

Before the Ford Foundation, Lisa spent 12 years doing commercial real estate development in Boston, first with non-profit community development corporations such as Codman Square Neighborhood Development Corporation and Asian Community Development Corporation, and then with the private equity firm New Boston Fund. She led the redevelopment of some of the most significant publicly-owned sites in the city, including the former Boston State Hospital site and MTA Turnpike parcels that came available as part of the Big Dig.

Lisa started her career in Texas and the Bronx as a community organizer and advocate on housing and homelessness issues. She sits on the Board of Directors for the Brooklyn Navy Yard, IMPACCT Brooklyn, and is a member of the Affordable and Multifamily Housing Council of the Urban Land Institute. 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.

Rob Day, General Partner, Spring Lane Capital

Rob Day has been a sustainable resources private equity investor since 2004, and acts or has served as a Director, Observer and advisory board member to multiple companies in the energy tech and related sectors.

Rob also serves on the Board at the New England Clean Energy Council. From 2005-2016 he authored the column Cleantech Investing, which appeared on GreentechMedia.com, and co-hosted several conferences with that group on the topic of new investment models for the sustainability sector.

Formerly a consultant with Bain & Company, Rob has worked with companies and evaluated private equity transactions in the energy/utilities, telecom, IT, medical/pharmaceutical, and retail industries. Earlier in his career, Rob was a member of the World Resources Institute’s Sustainable Enterprise Program, where he co-authored the report The Next Bottom Line: Making Sustainable Development Tangible.

Rob received his MBA at the Kellogg Graduate School of Management (Northwestern University), and his BA at Swarthmore College.
Olympia De Castro, Partner, Community Investment Management

Olympia De Castro serves as Partner of Community Investment Management, an impact investment asset manager that provides debt financing to U.S. small businesses through innovative and productive financial technology lending platforms. Olympia focuses on strategy and investments.

Prior to joining Community Investment Management, she worked as a consultant at The Louis Berger Group, providing advisory to multilaterals and government on infrastructure project finance. Ms. De Castro was a Director at Global Securities Capital Partners, a private equity firm focused on mid-cap opportunities in high growth, medium risk sectors in Colombia.

In 2011 Ms. De Castro worked at the IFC in the Global SME Banking group aimed at improving access to finance for small and medium enterprises globally. From 2009 to 2010, Ms. De Castro held a number of roles in the microfinance industry including portfolio management, investments and debt capital markets. Previously, she spent four years at Goldman Sachs in both the Investment Banking and Asset Management Divisions.

Ms. De Castro received a M.I.A in Economic and Political Development from Columbia University’s School of International and Public Affairs and a B.A. in Finance from the University of Miami.

Ariane de Vienne, Director Business Development North America, Head of New York Office, oekom research AG

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.
John Duong, Managing Director of Impact Investing, Lumina Foundation

John serves as the Managing Director of Lumina Impact Ventures, the impact investing arm of Lumina Foundation. He sources, structures, underwrites and negotiates impact investments to support Lumina’s strategic priorities towards Goal 2025. John most recently served as program and portfolio officer at the W.K. Kellogg Foundation, managing a $100+ million mission-driven and program-related investments portfolio and making grants to further the field of impact investing.

John previously held positions at J.P. Morgan and Co., Citigroup and Merrill Lynch as an investment banker in various roles including mergers and acquisitions advisory, credit risk analysis, equity research, capital structure optimization and corporate finance in both debt and equity products. John is also the Founder of Potencity, a social venture diversity recruiting platform focused on mid-, senior- and board level positions. John earned his BA from Yale University and an Executive MBA from Northwestern University. Born in Cambodia, John immigrated to the U.S. at a young age as a survivor of the Khmer Rouge concentration camp; he and his family were sponsored to the United States by the Catholic Sisters of St. Francis in Wisconsin where he grew up.

Kaela Gallo, Lead Designer, Propel

As the Lead Designer at Propel, Kaela manages the design and user research process for Fresh EBT. She is responsible for translating user needs and insights into a usable, modern mobile app interface. While most Fresh EBT users live in urban environments, Kaela led a trip to rural Virginia several months ago to interview SNAP recipients and users of our app. Prior to Propel, Kaela was a designer at Bloglovin, and before that she was an Americorps*VISTA and personal participant in the food stamp program.

Darcy Garner Bhatia, Managing Partner, 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 also 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.
Sada Geuss, Investment Manager, Trillium Asset Management LLC

Sada Geuss is an investment manager in Trillium’s Boston office. Prior to joining Trillium in 2015, Sada was an investment analyst at Deutsche Bank, where she spent over ten years providing investment advisory and consulting services to individual, institutional and family office clients. She has significant experience working with investors in the development of customized investment programs and has been working with clients with social investment mandates since 2005. Sada received her bachelor’s degree in Environmental Studies, with a concentration in Policy and Management, from the State University of New York College of Environmental Science and Forestry and holds the Accredited Investment Fiduciary® designation. She is a member of the non-profit board subcommittee of the Boston Club, a community of professional women that promotes the advancement of women to leadership roles, including for-profit and non-profit boards.

Matt Greenfield, Managing Partner, ReThink Education

Matt Greenfield is Managing Partner of ReThink Education, a venture capital firm focused on educational technology. He is on the boards of BrightBytes, Allovue, CareAcademy and Southern New Hampshire University. His non-profit affiliations include the leadership council of NewSchools Venture Fund and the board of Mouse.org.

Matt received his B.A., M.A., and Ph.D. in English from Yale University, where he won five academic prizes and fellowships from the Mellon and Whiting Foundations and served on the editorial board of the Yale Journal of Law and the Humanities. He taught at Bowdoin College, where he served on the committee overseeing admissions, and the City University of New York, where he served on a college curriculum committee, helped launch an interdisciplinary learning community program for first-year students, taught in the teacher preparation program, and taught graduate classes in literature to teachers from the New York City public schools.

Susan Hammel, Founder, Cogent Consulting

As a philosophy major who went to Wall Street, Susan Hammel translates between passionate social changemakers and expert accountants. In her role as Founder of Cogent Consulting Inc., Susan is serving her second year as Minnesota Council on Foundation Executive in Residence for impact investing, designed and launched the new $20 million Minnesota Impact Investing Collaborative fund, and is leading the charge to map the Twin Cities impact investing ecosystem, thanks to support from the Bush Foundation and the Otto Bremer Trust.

Susan has served as Executive Director of the Delta Dental of Minnesota Foundation and CFO for Ashoka: Innovators for the Public in Washington DC, and Lecturer in Nonprofit Management for the University of Chicago. She obtained her Masters in Public Policy from Harvard, is a Chartered Financial Analyst, and graduated cum laude Carleton College, in Northfield, Minnesota. Susan has extensive board experience, serving on the Sunrise Banks’ Advisory Board and prior chair of the Citizens League and NPH USA. Susan and her family reside in Deephaven, a lakeside community outside Minneapolis where she enjoys sailing, powerwalking and skiing.
Speakers & Committee Members

JoAnn Hanson, President, Church Investment Group
JoAnn is the President of the non-profit Church Investment Group (CIG) which works on behalf of Episcopal endowments. CIG enables Episcopal entities to realize the benefits of investing at scale and encourages the adoption of Environmental, Social and Governance (ESG) investing approaches. CIG seeks to be a significant voice within the Episcopal Church and the broader investment community in promoting investment options to address climate change and other social and governance issues.

Prior to CIG, JoAnn was a founder of Avanti Investment Advisors, which managed over $1.2 billion for institutional investors. Earlier investment management roles included serving as a managing director of Lazard Freres & Co. and a Vice President of J.P. Morgan Investment Management, Inc. She currently serves on the Real Estate Advisory Committee of the New York State Common Retirement Fund and the Advisory Board of the Alternative Investment Forum. JoAnn has a BA from Yale University (summa cum laude) and an MBA in Finance from Wharton Business School, University of Pennsylvania.

Erin Harkless, Senior Investment Director, Cambridge Associates
Erin Harkless is a Senior Investment Director at Cambridge Associates. Based out of the Arlington, VA office, she advises a variety of institutional investors on asset allocation strategy, manager selection, and investment program evaluation. Erin also works with clients to develop strategies for impact and mission-driven investments and is a member of the firm’s Mission Related Investing Practice.

Prior to joining Cambridge, Erin was a summer associate at the Princeton University Investment Company and an associate at Summit Rock Advisors where she directed strategic and tactical asset allocation for over $1 billion in client assets, and was responsible for conducting due diligence on hedge fund, fixed income, and long-only equity investments. Erin started her career as an analyst at Goldman Sachs in the Investment Management Division as part of the Alternative Investments and Manager Selection team.

Erin received her MBA from the Harvard Business School as a Robert Toigo Foundation Fellow and her BS magna cum laude from Washington University in St. Louis. She is also a CFA charterholder and member of the CFA Society of Washington DC. Erin serves on the board of the DC Public Library Foundation and is a former member of the Junior Leadership Board of Sponsors for Educational Opportunity.

Joshua Humphries, President & Senior Fellow, Croatan Institute
Joshua Humphreys is President and Senior Fellow of Croatan Institute. A leading authority on sustainable, responsible, and impact investing, Dr. Humphreys has taught at Harvard, Princeton, and NYU, and held numerous appointments as a Fulbright Scholar in Paris, an Aspen Environment Forum Scholar, associate fellow of the Rutgers Center for Historical Analysis, scholar-in-residence at the Rockefeller Archive Center, visiting research associate at the Johns Hopkins School of Advanced International Study, and fellow at Tellus Institute.

For more than a decade and a half, Dr. Humphreys has advised numerous businesses, nonprofits, foundations, community and labor groups, policymakers and multilateral organizations on sustainability and finance. His insights on trends in philanthropy, investor engagement, and impact investing have been widely published and regularly cited in the press. He serves on the advisory boards of Dwight Hall’s SRI Fund at Yale University, the Responsible Endowments Coalition, and the Coalition for Responsible Investment at Harvard.
Karen Karp, Founder & President, Karen Karp and Partners

Karen Karp, a respected entrepreneur, project manager and food business consultant, founded Karen Karp and Partners (formerly Karp Resources) in 1990 to grow food businesses. As President of the company, she brings over 25 years of specialized restaurant and food service management expertise to Karp Resources. The firm is comprised of two divisions, Good Food is Good Business, designing, project-managing and evaluating sustainable food and agriculture enterprises; and Good People are Good Business, increasing organizational and leadership effectiveness for strategic clarity and success, through executive coaching, supervisory development, performance management and recruiting services.

Stephanie Kater, Senior Manager, The Bridgespan Group

Stephanie Kater is a senior Manager at The Bridgespan Group. Since joining the organization six years ago, Stephanie has worked extensively with philanthropic and impact investors to make strategic investments with the potential to catalyze transformational social change. She is currently supporting The Rise Fund, an evidence-based impact investment fund seeking to make market rate investments that also achieve measureable social and environmental good.

From 2013-2016, Stephanie led a Bridgespan team working closely with Scott Cook, founder and chairman of Intuit, and his wife Signe Ostby to accelerate the magnitude and impact of their philanthropy with a new portfolio of impact investments and philanthropic grants. Stephanie is the author of Geek Cities: How Smarter Use of Data and Evidence Can Improve Lives as well as How Is Investing in “What Works” Working? Prior to Bridgespan, Stephanie worked at the U.S. Department of Education on the Obama administration’s Race to the Top initiative. Prior to that, she spent three years as a for-profit consultant in Silicon Valley at Webster Pacific, a boutique strategy firm. She is from the Washington, D.C. area and holds an MBA from the University of Chicago as well as a BS in Civil Engineering from Stanford University.

Joseph Kinard, Chair, Presbyterian Church (USA), Committee on Mission Responsibility Through Investment

Joseph M. Kinard is Chair of the Presbyterian Church (USA) Committee on Mission Responsibility Through Investment (MRTI) which was created in 1971 to advance the church’s mission through the financial resources (approximately $10 billion dollars) entrusted to it. MRTI implements the PCUSA policies on socially responsible investing (also called Faith-Based Investing) by engaging corporations in which the church owns stock. Priorities for MRTI include: pursuit of peace; racial, social and economic justice; environmental responsibility and securing women’s rights. He is also the Chair of the Environment and Climate Change Issue Committee, Presbyterian Church (USA).

Mr. Kinard, through his company The Kinard Group, LLC has helped companies in obtaining venture capital, mezzanine and angel financing representing both capital funds and their portfolio companies. During his tenure as Board Member of the Presbyterian Church (USA) Board of Pensions, Mr. Kinard served on the CEO Search, Investment, Board Development and Governance, Social Responsibility and Church Relations Committees. In addition, Mr. Kinard served as a reviewer of the Presbyterian Church (USA) Foundation investment strategy. He is an acknowledged subject matter expert in Corporate Socially Responsible Investing (CSR) having spoken at Institutional Investor Summits sponsored by The New York Stock Exchange, NASDAQ, Thomson Reuters and Guest Lecturer at The University of the South Babson Center for Global Commerce.
Doug Lawrence, Founder & Managing Principal, 5 Stone Green Capital

Doug is Managing Principal and founder of 5 Stone Green Capital and has more than 27 years of distinguished real estate industry experience. Prior to forming 5 Stone Green Capital, Doug was the Co-Portfolio Manager of the green real estate Urban Renaissance Property Fund for JPMorgan Asset Management’s Real Estate platform. While at JPMAM he was also a key member of the real estate marketing team serving as a trusted fiduciary to many large pension plans.

Doug’s strength as a senior asset manager garnered nine international and national awards from BOMA, IREM and NAIOP. Over the course of his career, he managed a large portfolio of industrial, office, multi-family and retail assets totaling millions of square feet and valued in excess of $1 billion while at JPMorgan.

Prior to JPMorgan he spent seven years as a senior asset manager for TIAA-CREF’s real estate investment group; he also worked in the public sector as the Asset Manager for the City of Hartford. Earlier in his career, he was a residential developer in the U.S. Southwest. Doug is a frequent speaker on green building topics.

Doug received his MBA from the University of Connecticut in International Business Finance and earned his BA from Yale University. He is or has been a member of the Pension Real Estate Association, Urban Land Institute, National Association of Securities Professionals, National Association of Real Estate Investment Managers and U.S. Green Building Council.

Doug sits on the Investment Committee and Natural Resources Committee of the University of Connecticut Foundation, the Advisory Board of Rutgers Business School, the Advisory Board of the Saunders Business School at Rochester Institute of Technology, the Global Board of Directors of the Climate Group and the Sustainability Advisory Board of the publication, the National Real Estate Investor. Doug holds or has held NASD Series 7 and 63 licenses.

Michael J. Lear, Vice President & Financial Advisor, Bernstein Private Wealth Management

Michael J. Lear is a Vice President and Financial Advisor with Bernstein Private Wealth Management. He is located in Bernstein’s global headquarters in New York. Michael advises individuals and institutions regarding a wide range of financial planning and investment matters, tailoring comprehensive strategies uniquely suited to each client’s individual resources, tax situation, risk tolerance and estate planning goals.

Prior to joining the firm in 2017, he was a portfolio manager with Athena Capital Advisors, where he was head of their New York office and worked on all aspects of managing client portfolios focusing on asset allocation, manager selection, implementation and aligning client portfolios with their values. While at Athena, Michael spent much of his time on impact/ESG matters, serving on numerous panels for Big Path Capital among others; he also served as part-time editor for Smarter Money. Michael represented the firm in the media with appearances on CNBC and Reuters TV, and he has been cited in The New York Times, and other media outlets.

Prior to Athena he was a portfolio advisor with MetLife in their Investment Strategies Group where he guided the regional and national institutional sales teams in the promotion and marketing of MetLife’s corporate benefit funding products. Earlier, he was a portfolio manager with Carruth Capital, where he oversaw the financial planning and portfolio of a single-family office. Michael earned a BS in marketing from Boston College and a Master’s in investment management from Boston University. He is a Chartered Financial Analyst (CFA) professional, a Chartered Alternative Investment Analyst (CAIA), and a Certified Investment Management Analyst® (CIMA®).
Angela Lee, Founder, 37 Angles; Chief Innovation Officer & Assoc Dean, Columbia Business School

Angela Lee is an educator & entrepreneur. As Chief Innovation Officer and Associate Dean at Columbia Business School, Angela teaches highly rated courses in strategy, leadership, and entrepreneurship. She is also the founder of 37 Angels, an angel network that invests in early stage startups and activates new women angels through a month long investing bootcamp. Angela started her career as a product manager and then consulted to Fortune 500 clients at McKinsey. 37 Angels is her 4th startup.

Angela is a sought-after expert on CNBC, Bloomberg TV, and Fox Business and is regularly featured in media outlets such as Forbes, Huffington Post, and Fast Company. Entrepreneur Magazine recognized Angela as one of Six Innovative Women to Watch in 2015 and Inc.com listed her as one of 17 Inspiring Women to Watch in 2017.

Christina Leijonhufvud, Managing Partner, Tideline

Christina Leijonhufvud is a Managing Partner at Tideline and co-leads the growth and strategy of the firm. In her work with Tideline's clients, she focuses particularly on investment and market analysis, strategy development, new product conception and design, and risk analysis. Christina has overseen projects with a variety of Tideline’s field-leading clients among them some of the largest foundations, intermediaries and asset owners active in the market as well as deeply mission-driven organizations and non-profits. She has considerable experience managing multi-stakeholder projects spanning the commercial, non-profit and public sectors.

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.

Jay Lipman, Co-Founder & President, Ethic

Jay is Co-Founder & President of Ethic. Ethic is a technology-driven, sustainable asset manager empowering investors to create investments specific to their values and financial goals. Our goal is to outperform on sustainability through our data-driven platform, while creating returns-driven portfolios that track benchmarks with precision.

Ethic's mission is to accelerate the global transition to sustainable investing. Our team's experience spans market-leading investment firms, including Goldman Sachs, Deutsche Bank and JPMorgan, top-tier design houses, and technology companies, including LinkedIn and Google.
L. Hunter Lovins, President, Natural Capitalism Solutions

L. Hunter Lovins is President of Natural Capitalism Solutions (NCS,) a Colorado non-profit that educates senior decision makers in the business case for a Regenerative Economy. NCS helps companies, communities and countries implement more sustainable practices profitably.

Trained as a sociologist and lawyer (JD), Hunter is a professor of sustainable business management at Bard College and the chief insurgent of the Madrone Project. Lovins has consulted for industries and governments worldwide, including International Finance Corporation, Unilever, Walmart, the United Nations and Royal Dutch Shell, as well as sustainability champions Interface, Patagonia and Clif Bar. She has briefed heads of state, the Pentagon, and about 30 other countries, and the U.S. Congress. Hunter lectures regularly to audiences around the globe. She has worked in economic development in countries from Afghanistan to New Zealand, and served the King of Bhutan on his International Expert Working Group, charged with transforming the global economy. She sits on the steering committee of the Alliance for Sustainability And Prosperity, and Capital Institute Advisory Board. A founding mentor of the Unreasonable Institute, she teaches entrepreneurship and coaches social enterprises around the world. She is a founding partner of Principium, an impact investing firm.

Caroline MacGill, Managing Director, Armonia

Caroline MacGill is a Managing Director at Armonia where she helps manage a portfolio of private investments geared towards positive environmental change. Since joining the firm, she has focused on developing engagement strategies in Armonia’s food and beef systems work and has led the firm’s foray into grassfed agriculture. Prior to Armonia, she worked at Deutsche Bank as a member of the Principal Finance Team, where she helped manage a proprietary investment portfolio focused on structured credit, infrastructure assets and renewable energy projects.

Caroline is a graduate of Princeton and Stanford University, where she received her BA and MBA respectively. With her sister, she founded the social venture, Farm to Cup Coffee. She lives in New York City with her husband and two children.

Torsten Marshall, Partner, Orrick, Herrington & Sutcliffe

Torsten Marshall is a partner in the Energy & Infrastructure Group at Orrick, Herrington & Sutcliffe LLP, concentrating on energy-related transactions. Torsten’s practice focuses on the representation of investors, developers, lenders, and multilateral agencies in all phases of the development, financing, construction, operation, acquisition and divestment of energy and other infrastructure projects and assets.

Torsten has extensive experience in domestic and international energy, private equity and infrastructure transactions, such as debt and equity financings, development projects, mergers and acquisitions, divestitures, investment funds, joint ventures, and restructurings, including international and cross-border transactions in Central & South America, Europe, Africa, Asia and the Middle East. He has participated in multiple transactions that have received “deal of the year” and other industry accolades and awards. Many of Torsten’s recent transactions have been debt and equity financings for the development, construction and operation of wind and solar renewable energy projects, and his pro bono work has included projects that have positive impacts on energy generation and the environment.

Education: J.D., University of Notre Dame Law School, 1991, cum laude
Bachelor of Business Administration, University of Notre Dame, 1981
Debbie McCoy, Managing Director, BlackRock, Active Equities Group

Debbie McCoy, Managing Director, is Head of ESG and Impact Investing within the Scientific Active division of BlackRock’s Active Equities Group.

Ms. McCoy joined the firm in 2015. Previously, she worked for Stanford University where she made investment recommendations to the university's endowment manager, conceived and co-taught an MBA finance elective course about investing in emerging and frontier markets, and was a Director of the Stanford Institute for Innovation in Developing Economies.

Ms. McCoy began her career at Bain & Company in San Francisco and Johannesburg and later worked for Citigroup in New York and New Delhi, as well as a sovereign wealth group. In 2013 and 2014, Ms. McCoy served as a non-partisan, Presidentially-appointed White House Fellow at the U.S. Department of State. She is a member of the Council on Foreign Relations and member of the advisory council for Medic Mobile. From 2011-2016 she was a trustee of the African Leadership Network.

Ms. McCoy received a Bachelor of Arts, summa cum laude, from Howard University, where she was elected to Phi Beta Kappa, and MBA from Harvard Business School.

Allyson McDonald, CEO, Work Capital

Allyson is CEO of Work Capital LLC, Work Capital is an asset management and consulting firm formed to prove that investing for financial return and positive social impact is not only possible, but the future of investing. Delivering competitive financial returns as well as social impact across asset classes, Work Capital demonstrates there can be profit with purpose.

Prior to founding Work Capital, Allyson held senior positions in asset management, philanthropy and impact investing at firms including Goldman Sachs, Fidelity Investments, and the Clinton Foundation. With a passion for investing in women and girls, Allyson is an owner and former Global President of Ellevate Network, a board member of the Morgan Stanley GIFT and SHAUN Foundation for Girls and advisor to Komera.org

Aria McLauchlan, Co-founder, Land Core USA

Aria McLauchlan is a social impact and environmental communications consultant and the co-founder of Land Core USA, an organization creating legislation for the 2018 Farm Bill that establishes a new USDA marketing label for farmers who apply regenerative soil health practices. Land Core’s initiative uses existing USDA infrastructure to create economic incentives for farmers, businesses and investors.

Previously, Aria served as the Communications Director of Kiss the Ground. She was a participant at COP21 and COP22, working with a growing coalition of organizations to establish agriculture as both problem and solution on the global climate stage.

Aria has a 10-year background in business, branding and marketing, and led client relationships and business development for clients like Target, Rainforest Alliance, Ekocycle, Prana, Aveda and Lindblad Expeditions-National Geographic. Aria has a Bachelor of Business with a double major in Marketing and Advertising from the Queensland University of Technology and is a proud dual citizen of both Australia, where she grew up, and the United States.
Elisa Miller-Out, Managing Partner, Chloe Capital

Elisa Miller-Out is an experienced tech entrepreneur, investor, board director and community builder. She’s currently co-founder of PolIQ, a chatbot polling tool for higher ed and managing partner of Chloe Capital, an early stage investment fund. She also serves on the board of Women 2.0. Elisa recently had a successful acquisition deal with a division of Singlebrook, a custom software services firm that she co-founded and led as CEO for over 10 years. She is now chair of the board and CFO at Singlebrook. Singlebrook has Fortune 500, higher education and nonprofit clients from all over the world including: Cornell, Yale, Henry Schein, Hitachi, the Sierra Club, the Environmental Defense Fund and more.

Elisa has been featured in the New York Times, the Washington Post, USA Today, Forbes and other publications, and she speaks about technology and entrepreneurship at events across the country. Prior to founding Singlebrook, Elisa founded two other companies and worked in a variety of industries in New York City. She has also founded several networking groups and regularly serves as a mentor and judge for startup accelerators and competitions.

Elisa graduated Summa Cum Laude from Barnard College of Columbia University. When she’s not working, Elisa enjoys local foods, Crossfit, swimming in waterfalls, reading and spending time with her husband and two daughters and her big extended family. Learn more at elisamillerout.com.

Kareen Mozes Laton, Partner, Head of Marketing, Chief Operating Officer of the Asset Management Business, GCA

Kareen Mozes Laton is a Partner in the New York office of GCA and the Head of Marketing and Chief Operating Officer of the Asset Management Business. She has over 20 years of experience in marketing, business development and entrepreneurship.

Prior to GCA, Kareen was the Chief Operating Officer and Head of Marketing and Business Development at Caravel Management LLC. Prior to Caravel, Kareen worked for Goldman Sachs in Private Wealth Management, and was a co-founder of 3-Sigma Value, LP a boutique hedge fund. Earlier in her career Kareen held various positions in marketing at Deloitte Consulting, and Bozell Worldwide.

Kareen received a MBA from New York University’s Stern School of Business and received her Bachelor of Arts with honors from Vassar College. She is fluent in French, Hebrew and Italian.
Cynthia Muller, Program and Portfolio Officer, W.K. Kellogg Foundation

Cynthia Muller is the program and portfolio officer at the W.K. Kellogg Foundation based out of Battle Creek, Michigan. She is part of the Mission Driven Investments team at the foundation. In this role, she is responsible for developing and managing strategic impact investment activities that address systemic barriers that create vulnerable conditions for historically marginalized communities and children. Her work includes sourcing and deploying market rate investments to increase social change impact; ongoing analysis of solutions and trends; developing relationships within the field; fostering alliances with community, corporate, government and philanthropic partners; and supporting the overall direction and implementation of the W.K. Kellogg Foundation’s strategic framework.

Prior to joining the foundation, Muller developed and managed Arabella Advisors impact investing practice where she helped foundations and individuals understand the field of impact investing; develop strategies and structure investments to accomplish their social and environmental goals. During her tenure she oversaw deal sourcing and structuring of investments in health, education, microfinance, housing, and green technology—both domestically and internationally. Muller also led several evaluations of impact investment portfolios, and she regularly presented and blogged about trends and practices within the field. Muller previously led strategic initiatives at Capital Impact Partners, where she developed and managed impact investments and worked on nationally focused investment funds and initiatives targeting health, food, education, energy efficiency, and economic development. Cynthia serves on the boards of Groundswell and Enterprise Community Loan Fund. Muller holds a Master of Business Administration from the Foster School of Business at the University of Washington and a bachelor’s degree in psychology from Stanford University.

The W.K. Kellogg Foundation (WKKF), founded in 1930 as an independent, private foundation by breakfast cereal pioneer, Will Keith Kellogg, is among the largest philanthropic foundations in the United States. Guided by the belief that all children should have an equal opportunity to thrive, WKKF works with communities to create conditions for vulnerable children so they can realize their full potential in school, work and life. The Kellogg Foundation is based in Battle Creek, Michigan, and works throughout the United States and internationally, as well as with sovereign tribes. Special emphasis is paid to priority places where there are high concentrations of poverty and where children face significant barriers to success. WKKF priority places in the U.S. are in Michigan, Mississippi, New Mexico and New Orleans; and internationally, are in Mexico and Haiti. For more information, visit www.wkkf.org.
Ma...
Amie Patel, Director, Elevar Equity

Amie Patel is a Director with Elevar Equity and manages and cultivates Elevar’s global partnerships including LP and co-investor relationships. Amie was previously a Vice President with Goldman Sachs Asset Management which she joined through the acquisition of Imprint Capital. Amie focused on the firm’s ESG and Impact investing capabilities within the emerging markets.

Prior to Imprint, she was with the Soros Economic Development Fund (SEDF) where she concentrated her efforts on early to growth stage investments. She managed SEDF’s investments in Haiti and worked on several other investment opportunities in Palestine, India and parts of Africa. Amie also was with the Overseas Private Investment Corporation as a Presidential Management Fellow in the Investment Funds department responsible for developing and evaluating top-quartile and first-time emerging market private equity fund managers.

Amie began her career as an M&A analyst with Merrill Lynch and First Union Securities. She also volunteered in Nepal with Students Partnership Worldwide as a Program Manager working on educational and women’s issues. She holds an MBA from Georgetown University and a BS in Business Administration from Washington University in St. Louis, MO.

Jameela Pedicini, Director, Asset Management, Perella Weinberg

Jameela Pedicini is a Director with PWP and co-leads the Mission-Aligned Investment efforts of the firm. Prior to joining PWP, Jameela was the first Vice President for Sustainable Investing at Harvard Management Company, where she was responsible for leading its sustainable investment strategy.

Previously, Jameela was an Investment Officer at the California Public Employees’ Retirement System (“CalPERS”), where she led the development and implementation of a variety of strategic ESG integration initiatives. Prior to joining CalPERS, Jameela worked at the UN-backed Principles for Responsible Investment, where she developed and facilitated collaborative investor engagements on social issues. She has an extensive background in ESG research. Jameela holds an MPhil in Comparative Social Policy from the University of Oxford, an MSc from the University of Amsterdam, a B.A. from Antioch University and the CFA Society of the UK, Investment Management Certificate.

David Press, Partner, Confluence Partners

David is a partner at Confluence Partners, a boutique communications strategy firm with a specialty in advising for-profit financial services firms and non-profit organizations on a range of communications matters in the impact investing sector. David brings a deep background in corporate strategy and positioning, narrative development, re-branding, investor relations and issues management with more than 25 years of experience as a securities lawyer and a communications practitioner. He enjoys helping organizations unpack their complex narratives, navigate challenging market environments and manage through highly sensitive communications matters.

Previously, David Press was the head of Corporate Strategy at kwittken + company. From 2006-2011, David was a Managing Director in Special Situations at FTI Consulting’s Strategic Communications division working on issues management and cross border matters. David started his communications career in 2003 as a Director at Brunswick Group in New York focusing on mergers and acquisitions. David began his career as a corporate finance/securities attorney in New York and practiced for several years, most recently at Morrison & Foerster LLP. Subsequently, David joined AOLTimeWarner in 2001 as a member of AOL’s business development team. David is a member of the Bar in The State of New York. David received his JD at Columbia Law School and his BA from Stanford University.
Rebecca Price, Program Officer, Investors' Circle

As the IC Program Manager, Rebecca promotes investment activity in each of IC’s current local networks and works to cultivate new local networks. Rebecca also leads Investors’ Circle’s education strategy and also develops and implements IC’s investor educational curriculum. Prior to Investors’ Circle, Rebecca provided strategy and growth assistance to a range of organizations including a Thai-Burmese NGO, two family foundations, and several local non-profit organizations. Rebecca received her undergraduate degree from the University of Michigan and holds a Masters in Education from the Harvard School of Education and an M.B.A., Magna Cum Laude, from F.W. Olin School of Business at Babson College. Rebecca lives in Boston with her partner and dog.

David W. Richardson, CFA, Executive Director, Global Head of Marketing and Client Service, Impax Asset Management

David is the Global Head of Marketing and Client Service for Impax Asset Management and serves on its Executive Committee. Impax is a leading global equity manager focused on the investment opportunities in the transition to a low carbon, sustainable economy. Impax manages over $6 B in public and private strategies primarily for institutional clients globally. David joined Impax in 2012 from Global Energy Investors, a private equity firm where he was a co-founder and Managing Partner. He previously co-founded and served for 22 years as Managing Director of Business Development at Dwight Asset Management Company, a fixed income manager acquired by Goldman Sachs Asset Management. Prior to Dwight, David headed Project Development at Mark Technologies Corporation where he led the development of a number of large scale wind energy projects. David received his BS in Mechanical Engineering from the University of California. He is licensed as a Civil Engineer and as a private pilot. David was a founding member of the Vermont CFA Society and served as President for two consecutive terms. He is a frequent presenter and contributor to financial publications including Pensions & Investments, Institutional Investor, Wall Street Journal, New York Times, CNBC and is a frequent contributor to Huffington Post on investment topics around sustainable investments. David is a member of the Global Advisory Council and the Sustainable Investing Advisory Council of the World Resources Institute.

Lyneir Richardson, CEO, Chicago TREND

Lyneir Richardson is Chief Executive Officer of Chicago TREND, a social enterprise aiming to catalyze retail development to strengthen commercial corridors in urban neighborhoods. The startup received $7 million of seed capital to launch operations and is actively investing in real estate projects.

He is also a Professional Practice Instructor in the Department of Management and Global Business at Rutgers Business School. He leads the Center for Urban Entrepreneurship and Economic Development, an award-winning research and practitioner-oriented center that builds the capacity of small business owners. Lyneir served as Chief Executive Officer of the primary economic development corporation in Newark, NJ. Previously, he was Vice President of Urban Development at General Growth Properties, Inc., where he led the national initiative to bring quality shopping centers to cities. He founded a company and was named a U.S. Small Business Administration “Young Entrepreneur of the Year.” Lyneir started his career as a corporate attorney at the First National Bank of Chicago. He graduated from Bradley University and the University of Chicago Law School. Lyneir is a member of the Urban Land Institute, International Council of Shopping Centers and International Economic Development Council.
Alicia Robb, Founder & CEO, Next Wave Ventures

Alicia is the Founder and CEO of Next Wave Ventures and a Managing Partner the Next Wave US Impact Fund and the Rising Tide Angel Training US Pilot Fund. She was previously a Senior Fellow with the Kauffman Foundation for more than a decade (www.kauffman.org). She is also the Founder and past Executive Director and Board Chair of the Foundation for Sustainable Development. (www.fsdinternational.org).

Alicia received her Ph.D. in Economics from the University of North Carolina at Chapel Hill. She has previously worked with the the Federal Reserve Board of Governors and is a prolific author on the topic of entrepreneurship. In addition to numerous journal articles and book chapters, she is the co-author of A Rising Tide: Financing Strategies for Women-Owned Businesses and The Next Wave: Financing and Investing Strategies for Growth-Oriented Women Entrepreneurs by Stanford University Press. She is an active angel investor, a limited partner in three early stage angel funds, a mentor to various young firms, and an advisory board member for several nonprofit groups, including the Deming Center Venture Fund, the Good Food Institute, and the Foundation for Sustainable Development.

Michael Saadine, Investment Director, Bridges Fund Management

Michael is an Investment Director at Bridges Fund Management for the U.S. Real Estate Funds and is responsible for opportunity origination, analysis, and execution. Michael joined Bridges in 2016 from Northwood Investors where he was focused on evaluating real estate acquisitions across capital structure and asset classes.

Prior to Northwood Investors, Michael was at Bank of America Merrill Lynch where he focused on corporate advisory, mergers and acquisitions, and capital markets transactions. Michael received a B.A. in Economics and Spanish with a Business Minor from Georgetown University.

Bridges Fund Management is a specialist fund manager focused on sustainable and impact investment with offices in London, New York, and San Francisco. Founded in 2002, Bridges is one of the largest impact investors in the world, having raised over $1.0 billion of commitments across its platform of funds. Bridges’ strategies include investing in growth companies and entrepreneurs, real estate, and social enterprises.
David Sand, Chief Impact Investment Strategist, Community Capital Management

As chief impact investment strategist, David is responsible for developing the macro-economic outlook applied in the construction of the firm’s investment strategies and effectively communicating the firm’s economic and market views and risks to partners, clients, and prospects. David also works on furthering the scope of impact reporting and metrics, business development, and creating new products to meet the needs of existing and future clients.

David is a well-regarded and sought-after speaker on the topic of impact investing and represents the firm in client meetings and media requests. He is a frequent guest lecturer on impact investing at college campuses around the country. David is chair of the Investment Strategy Committee and is a member of the firm’s Management Committee, Investment Management and Trading Committee, and Valuation Committee.

David has more than 35 years of investment management experience and is a trailblazer in the socially responsible/impact investing arena. In 1994, he co-founded Access Capital Strategies and served as its president and chief investment officer from 1994 to 2010. In this capacity, he pioneered the development of market-rate, fixed income impact investments for institutional investors. He then worked as a consultant to Community Development Financial Institutions (CDFI’s), non-profits and social enterprises. David serves on the following boards: New York Advisory Board for Enterprise Community Partners, Croatan Institute, and AERIS®: The Information Service for Community Investors. He is also a former board member of U.S. SIF: The Forum for Sustainable Investment.

David received his A.B. in American History from Princeton University and an M.P.A from the Kennedy School of Government at Harvard University. He holds FINRA licenses: Series 7 & 63.

Ommeed Sathe, Vice President, Impact Investment, Office of Corporate Social Responsibility, Prudential

Ommeed Sathe, is a Vice President and head of the Impact Investment unit in the Office of Corporate Social Responsibility at Prudential, where he oversees all underwriting, origination, pipeline development and portfolio management activities for the group. The Impact Investment unit manages a portfolio of over $600 million in investments and Prudential recently committed to grow its impact investing portfolio to $1 billion by 2020. The group typically originates between $200 million and $250 million in transactions annually and invests in a wide range of assets and strategies that produce both financial and social returns.

Before joining Prudential in June 2011, Sathe was director of real estate development for the New Orleans Redevelopment Authority (NORA), a quasi-public entity that alleviates blight, redevelops residential and commercial properties and implements crucial public projects in New Orleans. At NORA, he spearheaded the revitalization of historic commercial corridors like Oretha Castle Haley Boulevard and redeveloped over 1000 properties. Previously, he was a real estate and land use attorney with Fried, Frank, Harris, Shriver & Jacobson in New York City.

Sathe has an undergraduate degree in neuroscience and urban planning from Columbia University; a Masters degree in city planning from the Massachusetts Institute of Technology; and a J.D. from Harvard Law School. Sathe serves on the board of the Military Park Partnership, B-Lab, Non-Profit Finance Fund and The Community Development Trust. Sathe has been on the Company’s Board since 2014 and his present term expires in 2018.
Rachel Schneider, Senior Vice President, Center for Financial Services Innovation

Rachel Schneider is a Senior Vice President at Center for Financial Services Innovation (CFSI), and co-author of The Financial Diaries: How American Families Cope in a World of Uncertainty. The Financial Diaries connects the findings of the ground-breaking U.S. Financial Diaries research project, which collected highly detailed data about how 235 households save, spend, borrow and plan over the course of a year, with the broad trends upending the economic lives of American families. It uncovers the emergence of a hidden inequality, in addition to disparities in income and wealth — an inequality in access to steady finances. It provides a framework for how to develop the products and policies that can help.

Rachel is a highly sought-after consultant and speaker, always offering her frank, insightful assessments of the financial challenges facing the majority of Americans. Her research has been featured in the nation’s top publications, including the New York Times, Wall Street Journal and many others, and she speaks frequently at a broad spectrum of events. Though she began her career as an investment banker at Merrill Lynch & Co., Rachel credits her commitment to the potential for innovative finance to solve major social problems from her days as a VISTA Volunteer (now AmeriCorps). She holds a J.D./M.B.A. from the University of Chicago, and a B.A. from UC Berkeley. She lives in New York City with her husband, and their two children. She occasionally “competes” in triathlons, which are getting easier to “win” as the number of competitors in her age group shrinks. Unfortunately, the same improvements cannot be said of her piano skills.

The Center for Financial Services Innovation (CFSI) is the nation’s authority on consumer financial health. CFSI leads a network of financial services innovators committed to building a more robust financial services marketplace with higher quality products and services. Through its Compass Principles and a lineup of proprietary research, insights and events, CFSI informs, advises, and connects members of its network to seed the innovation that will transform the financial services landscape.

Steffen Schneider, Director of Farming Operations, Hawthorne Valley Farm

Professional Experience
Senior Director of the Institute for Mindful Agriculture (2017-) Programs, projects and research around a new narrative for agriculture, based on a mindful approach to soil, self and others. Current projects focused on food justice and food access in Columbia County, NY and research to transform our food system into food sheds.

Director of Farming Operations, Hawthorne Valley Farm (1994-present) Responsible for all farming and business operations for an 800 acre biodynamic farm including business departments: farm (livestock, gardens, field crops), creamery, bakery, sauerkraut cellar, farm store, farmers’ markets, CSA

Farm Manager, Hawthorne Valley Farm (1992-1994) Managed all farming and business operations for the farm department of HVF. Leader of the team that brought the farm back from near insolvency (caused by a failed wholesale distribution venture in the early 1990’s) to its present state.

Herd Manager, Hawthorne Valley Farm (1989-1992) Managed all aspects of the dairy operation at Hawthorne Valley and was responsible for health, nutrition, breeding, and forage making for the 60 cow dairy herd.

Farmer at Nokomis Farm, East Troy Wis. (1983-1989) Part of a three man farming team that initiated a biodynamic farm project in East Troy Wisconsin. Served as herdsman and general farm staff person.

Teaching Experience
Adjunct Faculty Member, Pfeiffer Center and HVF Learning Center (2006-2013) Teaches livestock management and other biodynamic courses. He is also a regular presenter at the Hawthorne Valley Farm Learning Center during classes on biodynamic agriculture and new farmer training courses.

Founding of the Institute for Mindful Agriculture on 6/8/2014
**Jason Scott, Co-Managing Partner & Board Member, Encourage Capital**

Jason Scott is a Co-Managing Partner and on the Board of Directors of Encourage Capital. He was a co-founder of EKO. Jason is a member of the Investment Committee of the EKO Green Carbon Fund. Prior to EKO, Jason was a founding Director and investment analyst at Generation Investment Management, co-founded by David Blood and former Vice President Al Gore, Jr. As its first employee, Jason helped build the firm and its first and second products, investing in global listed equities and climate change solutions respectively. From 1999 to 2004, Jason worked with Acumen Fund, Flatiron Future Fund/Foundation and New Philanthropy Capital.

From 1996-1999, Jason was President of a NYC-based software company. Previously, Jason helped found and build Public Allies, a youth and community development organization. In 1998, the Rockefeller Foundation selected Jason as a fellow in its Next Generation Leadership Program. He co-founded Cleantech for Obama and served on several transition advisory boards for the Obama Administration and is currently on the boards of Oil Change International, the Frankfurt Zoological Society and Public Allies. Jason also co-founded and jointly leads a network of family offices investing in Cleantech, Renewables and other Environmental Opportunities (called the CREO Syndicate). Jason graduated from Duke University cum laude and has an M.B.A. with honors jointly from Columbia and London Business Schools.

**Fran Seegull, Executive Director, US Impact Investing Alliance, Ford Foundation**

Fran Seegull is the Executive Director of the U.S. Impact Investing Alliance. The Alliance works to increase awareness of impact investing in the United States, foster deployment of and demand for impact capital across asset classes globally, and partner with stakeholders, including government, to build the impact investing ecosystem. Seegull was the Chief Investment Officer and Managing Director of Investments at ImpactAssets where she headed investment management for The Giving Fund—an impact investing donor advised fund. Seegull also oversaw product development and managed the Global Sustainable Agriculture and Microfinance Plus Notes.

Prior to joining ImpactAssets, Seegull was Managing Director at Funk Ventures, an early-stage impact venture capital firm. She also served as Vice President of Business Development at Novica, an online retailer of products made by artisans in Asia, Africa and Latin America. Seegull has consulted to National Geographic and NPR West as well as a number of family foundations and offices. She has a BS in Economics from Barnard College at Columbia University and an MBA from Harvard Business School. She served on the Investment Committee of the Goldhirsh Foundation and on the G7 Social Impact Investment Task Force Working Group on Asset Allocation. She tweets on impact investing at @franseegull.

**Ruth Shaber MD, Founder & President, Tara Health Foundation**

Ruth Shaber MD is the founder and president of the Tara Health Foundation, which promotes health, well-being and opportunity for women and girls through innovative evidence-informed programs. The foundation demonstrates the creative use of philanthropic capital to solve social problems. Ruth had a robust career as a clinician and executive at Kaiser Permanente (KP) from 1990 to 2012. Her positions included chief of Obstetrics and Gynecology, director of Women’s Health for the Northern California division of Kaiser Permanente, founder of KP’s Women’s Health Research Institute and the Medical Director at the Kaiser Permanente Care Management Institute (CMI) from 2007 to 2012.

Ruth is chair of the board of directors at Jacaranda Health and on the Medical Advisory Committee for Planned Parenthood Federation of America.
Greg Shell, Managing Director, Bain Capital Double Impact

Greg Shell joined Bain Capital Double Impact as a managing director in 2016. Prior to joining, Mr. Shell served as a Lead Portfolio Manager of a concentrated Global Equity product at GMO. Previously, Mr. Shell was a Senior Equity Analyst at Columbia Management Group and a Consultant at Bain & Company in its Strategy and Private Equity practice areas.

Mr. Shell earned his MBA from Harvard Business School and received a Bachelor of Science from MIT.

Candace Smith, Managing Director of Risk, MicroVest

Ms. Smith is the Managing Director of Risk (MD Risk) and is responsible for portfolio risk management. Ms. Smith joined MicroVest in 2005 as CFO before transitioning to COO, Chief Compliance Officer, and then to her current role in December 2014.

Ms. Smith started her career in 1985 and has extensive experience in development finance and domestic banking. 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 to promote solar electric service enterprises in developing countries. Previously, Ms. Smith served as Senior Credit Officer and Portfolio Officer at the Inter-American Investment Corporation (“IIC”), with responsibility for developing and maintaining corporate credit risk guidelines and oversight of a $400 million portfolio of project loans and equity investments throughout Latin America and the Caribbean.

Anna Snider, Managing Director & Head of Due Diligence for the Chief Investment Office within Global Wealth & Investment Management, Bank of America

Anna Snider is Managing Director and Head of Due Diligence for the Chief Investment Office within Global Wealth & Investment Management, Bank of America. 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 (CAIA℠) designation. Anna serves as chair of the board for High Water Women, a foundation based in New York City.
Madji Sock, Partner, Dalberg Global Development Advisors

Madji Sock is Senegalese and a Partner in Dalberg’s Dakar office. She has close to 20 years of experience implementing, managing and evaluating projects in Africa, Asia, Eastern Europe and the United States. Madji recently designed and launched a Dalberg-incubated initiative to establish the Women’s Investment Club Senegal (WIC). The club aims to address the constraints Senegalese women face in the missing middle for access to finance, and to promote women investing in the West African Stock Exchange. WIC will transition to become a Fund in 2018. She has conducted in-depth studies on women’s economic empowerment including a feasibility study for the development of a new UNICEF training program aiming to provide vocational training for vulnerable girls in Guinea, and a study of the African Women in Agricultural Research and Development (AWARD), to design a program that is responsive to the needs of women researchers in Francophone Africa. Madji also supported the implementation of the USAID/ Sonatel Foundation Gender Equity Program (PEGE), focusing on promoting academic excellence and school retention among disadvantaged girls, and using poverty alleviation and income generating activities to support the mothers of scholarship recipients and women’s organizations in rural areas in Senegal.

In addition to her gender specific engagements, Madji has also led and supported various initiatives to spur SME development including supporting the implementation of an “Innovative Business Plan Competition” in Cote d’Ivoire; leading a study in Benin to set up a financial intermediary platform targeting SMEs; and leading a five-country market assessment of youth employment opportunities in key agricultural value chains to identify needs and opportunities for youth employment and enterprise development. She also led a study to understand the demand side of the impact investing industry in West Africa and map the supply of impact investing capital in the region; and led a competitive analysis and viability assessment for investment in an industrial park in Ghana, through an economy-wide assessment of high potential industries based on domestic economic activity in Ghana, regional trade and investment trends, as well as trade competitiveness, the government of Ghana’s national and regional development agenda, and potential development impact of the industrial park on the local economy.

In fund design and resource mobilization, Madji supported the design, launch and operationalization of up to a $1bn multi donor catalytic fund for primary education for a non-profit organization in Côte d’Ivoire, Kenya, Bangladesh and India, and directed three separate engagements to facilitate national investment by development partners and private sector actors for the governments of Burundi, Cote d’Ivoire, and Guinea. Prior to Dalberg, Madji worked for Deloitte in Washington, DC. Madji considers herself an African women entrepreneur who is faced with access to finance challenges daily, to support the concept store she founded in Dakar to promote West African made clothing, accessories, and culture. She is also the founder of the consulting firm FocusAfrica which merged with Dalberg in 2010, and serves as the President of the Women’s Investment Club Senegal. Madji holds an MBA in International Management from Thunderbird, School of Global Management. She is fluent in English and French.
Laurie Spengler, President & CEO, Enclude Solutions

Laurie J. Spengler is President & CEO of Enclude (formerly ShoreBank International Ltd. and Triodos Facet), a global advisory firm and impact investment bank 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.

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 a regional advisory firm she sold to her management team in 2005. She also worked as an attorney with the New York, Brussels and Prague offices of White & Case.

Ms. Spengler has a JD from Harvard University and an undergraduate degree from Stanford University. Among her active board engagements, she serves as a member of the Executive Committee of the Aspen Network of Development Entrepreneur, the UK National Advisory Board on Impact Investing and the CDC Group. Ms Spengler is also a member of the Council on Foreign Relations.

Kate Starr, CIO, Flat World Partners

Kate leads the investment team at Flat World Partners. She advises foundations, family offices, pensions and other institutional investors on building competitive, sustainability-focused portfolios.

Prior to joining Flat World, Kate led the team at the Heron Foundation that invests Heron’s approximately $300 million portfolio for impact. Kate started her career as an economics and equities analyst at First Asset Management and moved into research on microfinance in Tanzania. She is a CFA and advisor to the Sustainability Accounting Standards Board, Humanity United’s Workforce Solutions Fund, and OpenInvest, the first digital investment advisor to offer customizable portfolios.

Kate graduated from Indiana University with an Honors degree in English and Italian, and earned a Master’s degree in International Relations from Johns Hopkins School for Advanced International Studies.
Dr. Gitanjali Swamy, Managing Partner, IoTask

Gitanjali Swamy is a Managing Partner at IoTask, an “Innovation of Things” (IoT) company. She is an experienced finance, technology investment professional, innovator and entrepreneur. Dr. Swamy has founded, built and served as a board director in successful entrepreneurial or intra-preneurial enterprises with over a dozen fundraisings and acquisitions under her tenure. She has held investment and professional roles in global leaders including The Carlyle Group and Booz Allen & Hamilton. She is Founder/Advisory Board Member of the U.C. Berkeley WiT Center, Director of Special Projects at Private Capital Research Institute at Harvard Business School, on the Board of National Center for Innovation and Entrepreneurship and Board Advisor to several entrepreneurial ventures.

Previously, Dr. Swamy was an investment professional with The Carlyle Group. Prior to Carlyle, she consulted with Matrix Partners, advising on investment strategy and portfolio incubation. Dr. Swamy has worked in management consulting at Booz Allen and Hamilton advising financial or technology clients on strategy, innovation and new business creation efforts. She has helped clients start and transition groundbreaking global innovative public and private sector entities such as MIT’s OpenCourseware, the Auto-ID Consortium and more recently the MIT Engine investment vehicle. Dr. Swamy has held product and line-management roles at companies like Mentor Graphics, The Mathworks and held senior management positions, including Chairman & CEO, while she led the companies from inception through fundraising, team recruitment to market development of cross-border enterprises and to acquisitions. Dr. Swamy received her B. Tech in Electrical Engineering from the IIT Kanpur, where she was awarded Academic Proficiency Prizes, her Ph.D. in EECS at U.C. Berkeley, where she was an NSF Fellow & President of WICSE, and her MBA from Harvard Business School, where she served as CFO of HBS-SA. She has nearly 25 publications and patents in the fields of data, algorithms, technology and policy.

Quyen V. Tran, Vice President & Equity Portfolio Specialist, Wellington Management

As a member of Wellington’s Global Impact team, Quyen assumed an early and active role in developing relationships with the broader impact investing community, helping to shape the firm’s impact strategy in public equities. She works closely with the investment team to analyze the portfolio and communicate the investment philosophy, risk management, performance attribution, and positioning.

Quyen’s passion for social enterprise and impact investing was kindled by her experiences as a student in India, a volunteer classroom teacher in Vietnam, and a volunteer for public school children in the U.S.

Prior to joining Wellington Management, Quyen worked at Fidelity Investments as a director of investment analysis. Before that, she was a senior investment consultant at Cambridge Associates, where she advised endowments and foundations on total portfolio investment strategies and recommended products for hire and termination. She was also a senior consulting associate and headed the training program for associates globally, working from the Boston and London offices. Quyen earned her MBA from Harvard Business School and her BA, cum laude, in philosophy from Mount Holyoke College.

Brace Young, Partner, Arabesque

Brace Young is a Partner at Arabesque, and the former Chief Executive Officer of Eclat Impact. Previously, Mr. Young was CEO and a Partner at Mariner Investment Group from 2000 to 2015. He joined Mariner from Goldman Sachs, where he retired as a Partner after a 20 year career in Fixed Income in New York, Tokyo, and London. Brace is the Chairman of the Board of Trustees of Buckingham Browne & Nichols, a coeducational day school in Cambridge, Massachusetts. He is also Chairman of the Board of Directors of Social Finance Inc., a Boston-based nonprofit organization dedicated to mobilizing investment capital to drive social change.