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Fordham Impact Investment Convening 2018
Opportunities, Challenges and Developments

Fordham University – Skadden Conference Center
150 West 62nd Street, New York, NY 10023 USA
12 December 2018

#ImpactFordham

<u>MISSION</u>
Expose key players in the financial community, policymaking and academia to the current landscape and thinking regarding the ***Opportunities, Challenges and Developments*** affecting impact investing in an inexorable drive toward mainstream.

<u>ABOUT THE EVENT</u>
This inaugural ***Fordham Impact Investment Convening (#ImpactFordham)*****;** is a 200-person invitation only event, hosted by *Fordham Gabelli School of Business* and *Fordham Graduate Net Impac*t, bringing together a curated group of individuals for a deeper discussion about unlocking the power of private capital to make both financial and social/environment impact returns. The event culminates in a cocktail party, generously sponsored by the *United Nations Capital Development Fund*.

<u>LINK TO DIGITAL AGENDA, BIOS</u>

https://www.fordham.edu/info/28766/fordham_impact_investing_conference

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FORDHAM IMPACT INVESTMENT CONVENING AGENDA 2018

7:30-08:00	**Registration, Arrival and coffee**
8:00-8:30	**Welcome** Greeting from Ariel Fishman, Office of Provost, Fordham University, Event Introduction from Peter Lupoff, Fordham University, Lupoff Family Office
8:30-9:15	**Can We Do Good *and* Do Well? Issues, Unintended Consequences, Hope** Panelists: ● Chris Bullard, Senior Associate, Acumen ● Pearline Yum, Manager, The ImPact ● Sharadiya Dasgupta, Managing Director, Good Capital Project Moderator: David Stevens, Director of Strategy, World Policy Institute
9:15-10:00	**Blended Finance Mechanics, Can All Constituents Win?** Panelists: ● Amy Wang, Investment Manager, PG Impact Investments ● Alice Catalano, SVP, Sarona Funds ● John Larkin, Head of Impact Investments, Avenue Capital Group Moderator: Esther Pan Sloane, Head of Partnerships, Policy and Communications, UNCDF
10:00-10:15	**Break**
10:15-11:00	**ESG, Materiality and Measurement** Panelists: ● Jeffrey Gitterman, Co-Founder, Gitterman Wealth Management ● Jeff Cohen, Product Strategist, SASB ● Christina L. Alfandary, Managing Director, Gabelli Funds, ESG Moderator: Linda Zhang, Ph.D, CEO, Purview Investments

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11:00-11:45	**Financial Inclusion via Alternative Credit Strategies** Panelists: ● Bhakti Mirchandani, Managing Director, FCLT Global ● Arjun Batra, CIO, Lendable Marketplace ● Wole Coaxum, CEO, Mobility Capital Finance Moderator: Obie L. McKenzie, Managing Director, BlackRock
11:45-12:30	**Keynote Speaker – Danielle Kayembe, Greyfire Impact** *The Rise of the Female Driven Economy- How Women are Driving Innovation, Impact and the Future of Economics* Danielle is a female futurist and serial entrepreneur dedicated to empowering women through her global work in business, social impact, writing and public speaking. She has been featured on CNBC and in Forbes. Danielle is an Ariane de Rothschild Fellow for 2018, and is currently an Entrepreneur in Residence at Nike.
12:30-1:00	**Lunch Buffet** (Please return to seats by 1PM) Generously sponsored by Deutsche Bank Wealth Management Deutsche Bank Wealth Management
1:00-1:45	**Safe Spaces, Sustainable Cities and Communities** Panelists: ● Derwin Sisnett, Partner, Maslow Development ● Avi Telyas, Founder, Makerhoods ● Katherine St. Onge, Director, Calvert Impact Capital Moderator: Mickey Penzer, Vice President, Penzer Family Office
1:45-2:30	**Keynote – Blockchain for Good** Paul Johnson, Fordham University, Nicusa Investment Advisors
2:30-2:45	**Break**

2:45-3:30	**Harnessing the Power of and Returns from, Gender Lens & Inclusive Investing** Panelists: • Jarrid Tingle, Co-Founder, Harlem Capital Partners • Leslie Harwell, Managing Partner, Alante Capital • Chinedu Enekwe, Managing Partner, AffinitiVC Moderator: Bahiyah Robinson, Founder, VC Include
3:30-4:15	**Evolving Impact Product Landscape - What's New, What's Next?** Panelists: • Catarina Schwab, Co-Founder, CEO, NPX • Abigail Steinberg, Program Manager, FIBR • Ethan Powell, Founder, Impact Shares Moderator: Marcia Nelson, Managing Director, Aberleen Family Office
4:15-4:30	**Break**
4:30-5:00	**Screening of "Planetary"**, Introduced by Co-Producer, Andrew Appel, Gitterman Wealth Management
5:00-8:00	**Fordham Impact Cocktail Party** - Generously sponsored by the United Nations Capital Development Fund Welcome and Introductory Remarks by Judith Karl, Executive Secretary, UNCDF

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SPEAKER BIOGRAPHIES
(In order of appearance)

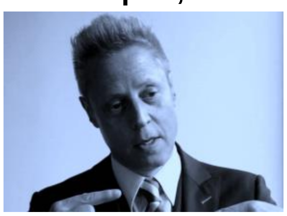
Ariel Fishman, Fordham University, Office of the Provost, Academic Program Planning

Ariel Fishman, Ph.D., is Assistant Vice President of Academic Programming at Fordham University, where his primary responsibilities involve the development of new academic curricula at Fordham as well as strategic planning and accreditation-related matters.

Prior to joining Fordham, Fishman worked at Yeshiva University overseeing the office of institutional research, where he also served as a member of the faculty at the Sy Syms School of Business, teaching coursework in strategy, applied business research, and management. His scholarly interests include areas as diverse as M&A in the pharmaceutical industry to examining the impact of fairness in the workplace. He earned a Ph.D. in strategy from Columbia University's Graduate School of Business and a Bachelor of Arts in psychology from the University of Pennsylvania.

Outside of Fordham, Fishman serves on the Board of Trustees of the New York Blood Center, and is a regularly invited guest speaker on the area of blood donation as well as on disability. He delivered a TEDx talk on the subject of disability and innovation.

Peter Lupoff, Fordham University, Lupoff Family Office



Peter M. Lupoff is the managing member of *Lupoff Friends and Family Interests, LLC*, his vehicle for direct and managed investments, impact investing, as well as other advisory, research, teaching and writing activities. Peter is a Fordham University Fellow, at their Center for Research in Contemporary Finance. He is additionally, Fordham Gabelli School of Business, Executive in Residence (2018-19). Mr. Lupoff is Advisor to student-managed funds at *Yale School of Management* and *Yale University*. A Fellow at think tank, *World Policy Institute*, Mr. Lupoff continues and expands his work on Markets, Behavioral Finance, Impact Investing, and Market Shock and Dislocation. Peter is a Member of the *Impact Investing & Sustainable Finance Faculty Consortium*. Peter is also President of *Clean Power for Humanity*, a not-for-profit with the objective of bringing green power to rural developing world communities, to expand education and commerce, and an active participant with recidivism focused non-profit, *Defy Ventures*.

Peter has worked for legendary investors. He counts both Marty Whitman of *Third Avenue Funds* (1990-98, Trader, Partner, Portfolio Manager) and Izzy Englander of *Millennium Management* (2007-09, Portfolio Manager, Managing Director) as mentors shaping his investment perspectives. In 2009, Lupoff founded registered investment advisor, *Tiburon Capital*

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Management, an event-driven fund manager. Peter was the Chief Investment Officer and Co-Portfolio Manager of Tiburon 2009-2017.

Mr. Lupoff is a regular featured discussant on academic papers related to, and consultant to, *The Federal Reserve Bank* regarding market shocks and liquidity. Mr. Lupoff is an outside director of various unaffiliated investment entities and consults impact funds and enterprises, and traditional asset managers. Mr. Lupoff also provides expert litigation testimony on matters related to hedge funds, trading and areas of his specific expertise.

Chris Bullard, Acumen, Senior Post Investment Associate

Chris Bullard leads post-investment and value creation strategy for Acumen's portfolio of companies. In this role Chris coordinates leadership, advisory, and technical support across Acumen's global portfolio, while also engaging directly with companies to share insights that help companies overcome common barriers to scale. Leveraging a global community and Acumen's internal pool of knowledge, Chris works closely with Acumen's regional teams and channel partners to add strategic value to Acumen's portfolio and accelerate their path to scale.

Chris began his career on the start-up team at an energy services company in Los Angeles and grew the enterprise to over 100 employees by building the business's capacity to provide energy efficiency and solar solutions. Chris also led his own venture focused on the recycling and financing of solar thermal systems in the California region, and a non-profit in Tanzania that provides education opportunities for disadvantaged youth. Subsequently Chris worked as an energy consultant for New York utilities and Fortune 500 companies, providing guidance on how to scale sustainability programs and strategies within larger organizations. He holds a BA from University of Southern California, and an MBA from Fordham Gabelli School of Business. In his free time Chris is an avid musician, hiker, biker, and traveler.

Pearline Yum, The ImPact, Manager

Pearline Yum is a Manager at The ImPact. The ImPact is a global membership organization that inspires and supports families to make more impact investments more effectively.

Pearline leads The ImPact's data-driven insights initiative, including managing more than $1 billion of member and partner investments on the *ImPact@Addepar* data platform and a research project to analyze families' impact investment interests and their satisfaction with impact investment products and services in the market. Pearline also spearheads The ImPact's strategic initiatives in Asia, curating and managing the ImPact member community for the region.

Pearline was previously a financial regulator with the Monetary Authority of Singapore for five years, overseeing U.S. banks operating in Singapore. There, she specialized in Private Banking, Custodial Banking and AML/CFT risk management and controls.

Pearline holds a Masters of International Affairs from Columbia University, with a focus on international finance and renewable energy, and a Bachelor of Arts in Economics from the National University of Singapore.

Sharadiya Dasgupta, Managing Director, Good Capital Project

Sharadiya is Managing Director of Good Capital Project. She has worked across asset management firms in institutional client businesses, and in corporate banking. She aims to leverage her experience and learning of "mainstream" financial services in her current pursuit of enabling capital movement towards segments that need it the most. She has a BSc in mathematics and statistics, an MBA from Indian School of Business, and an MPA with a focus on economic policy from Columbia University. She lives in New York City.

David Stevens, Director of Strategy Development, World Policy Institute

David Stevens is the Director of Strategy at the World Policy Institute where his responsibilities include strategic planning and program development. He is also the founding Director of the Institute's Program for African Thought – a program dedicated to raising the profile of African expertise in the global policy debate. An active Fellow at the Institute, he regularly gives talks on African affairs and politics at institutions such as the Yale School of Management, Harvard Business School, NYU Wagner Graduate School of Public Service, and SUNY Purchase.

Prior to joining WPI, David was a doctoral candidate in Princeton University's Department of Politics, where his research focused on the politics of Southern Africa, ex-combatant reintegration, and the diffusion of political ideas. While at Princeton he was a PhD Affiliate at both the Innovations for Successful Societies Program and the Center for Arts and Cultural Policy Studies at the Woodrow Wilson School for Public and International Affairs.

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Amy Wang, Investment Manager, PG Impact Investments

Amy Wang is a Vice President at PG Impact Investments and leads the firm's private debt practice with an emphasis on financial inclusion and energy access. Prior to joining PG Impact Investments she worked as an Assistant Vice President for Deutsche Bank's Global Social Finance group where she led the group's clean energy and South/Southeast Asian financial services social enterprise investing activities. Prior to Deutsche Bank, Amy worked at Grassroots Business Fund, Centinela Capital Partners and Citigroup Corporate Investment Bank. Amy has worked across Asia, Africa, Eastern Europe and Latin America. She holds an MBA from the Wharton School of Business from the University of Pennsylvania, an MA in International Affairs from the Lauder Institute from the University of Pennsylvania and a Bachelor of Science from Carnegie Mellon University.

Alice Catalano, SVP, Sarona Funds

Alice is responsible for growing relationships with clients and contributing to the firm's overall business development. She joined Sarona in July 2018 and has over 20 years of private equity business development experience. She was previously Managing Director of Fundraising and Marketing for Prostar Capital where she helped grow the start-up private equity firm to over $500mm AUM. Prior to that, she was Director of Investor Relations with NGP Energy Capital Management where she led the investor relations and fundraising efforts of 10 funds and was actively involved in business development efforts, helping to grow the firm to over $13bn AUM. Ms. Catalano has also been a leader in providing ILPA compliant reporting and developed matrices to recognise ESG awareness at both Prostar and NGP. Ms. Catalano has a B.S. in Finance from Northeastern University.

John Larkin, Head of Impact Investments, Avenue Capital Group

Mr. Larkin is responsible for the overall direction of the Avenue Impact Team. He sits on the Fund's investment committee assisting in the strategic direction, sourcing of key relationships, and advising on investment opportunities. Previously, Mr. Larkin was Head of Alternative Investments - Americas at Deutsche Bank where he managed the private asset platform which included private equity, hedge funds and real estate investments. While at Deutsche Bank, he served as a board member to various investment funds with fiduciary oversight and as a speaker on the topic of climate change. Prior to joining Deutsche Bank, Mr. Larkin was Head of Private Investments within Merrill Lynch and later Co-Head of Third Party Alternative Investments at Citigroup. Mr. Larkin currently serves on the board of Cogent Energy Systems and previously as a board member of North American Biofuels Co and advisor to Amelio Solar. These firms focused on innovative technology in the cleantech sector where he has been an avid personal investor and spokesman for the past 15 years.

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Mr. Larkin is a retired Navy Commander/Pilot and holds a B.S. in Mechanical Engineering from the New Jersey Institute of Technology (1984) where he currently serves on the Tuchman School of Management advisory board.

Esther Pan Sloane, Head of Partnerships, UNCDF

Esther Pan Sloane, a U.S. national, joined UNCDF as the Head of the Partnerships, Policy and Communications in October 2016.

Prior to joining UNCDF, Esther was a U.S. diplomat for 10 years. As Adviser at the Permanent Mission of the United States to the United Nations in New York, she was on the U.S. team that negotiated the 2030 Agenda and the Sustainable Development Goals. She also served on the Executive Boards of UNDP, UNICEF, UNOPS, and UNFPA, pushing the agencies to become more efficient, effective, and accountable for results.
Esther previously served as a U.S. diplomat in China and the United Kingdom, as well as at the State Department Operations Center in Washington.

Prior to joining the U.S. Foreign Service, Esther worked as a journalist in print, radio, and magazines. Esther graduated from Stanford University with a BA with honors in English and International Relations and earned an MA in Theater and Performance from the University of Cape Town, which she attended on a Fulbright Fellowship.

Jeffrey Gitterman, Co-Founder, Gitterman Wealth Management

Jeff Gitterman is a co-founding partner of Gitterman Wealth Management, and a thought leader in the field of Sustainable, Impact, and ESG (Environmental, Social, and Governance) Investing. He is the creator of his firm's SMART (**S**ustainability **M**etrics **A**pplied to **R**isk **T**olerance)® Investing Services, which offer investment opportunities for individual clients, as well as research and investing services for other financial professionals in the Sustainable, ESG, and Impact arenas.

Noted as an "ESG expert" by *Financial Advisor* magazine, Jeff has also been featured in the past in *Money Magazine, Barron's, Morningstar Magazine, The Wall Street Journal, CNN,* and *Affluent Magazine*, among many others. He also speaks frequently about Sustainable, Impact, and ESG Investing at conferences throughout the United States and Canada, including *Morningstar, Fidelity, Barron's, FA Magazine, Bloomberg,* and many others.

Gitterman Wealth Management has also served as the host of the 2018 Sustainable Investing Conference at the United Nations, as well as the 2016 and 2017 NYC Sustainable Investing Conferences. Jeff deeply believes that the migration of investor capital towards more Sustainable, Impact, and ESG investments is one of, if not the most effective way to help realize the United

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Nations' Sustainable Development Goals (SDGs), and he is committed to helping both investors and other financial professionals navigate the rapidly growing Sustainable, Impact, and ESG Investing landscape.

Jeff is the author of Beyond Success: Redefining the Meaning of Prosperity, and also an Associate Producer of the feature documentary film, Planetary. Most recently, he was named RIA "Thought Leader of the Year" by WealthManagement.com. He also serves on the Board of Directors for the Child Health Institute of New Jersey at Rutgers Robert Wood Johnson Medical and dedicates much of his free time to raising funds and awareness for the autism community.

Linda H. Zhang, Ph.D, CEO, Purview Investments

Linda H Zhang, Ph.D is the CEO and founder of New York based Purview Investments, an independent investment firm and a registered investment advisor. The firm offers actively managed ETF portfolios, focusing on global investing and impact investing for individuals, endowments and institutions. Linda developed extensive expertise in building ETF managed solutions, ETF research and execution, ESG investing, macro investing, quantitative research and portfolio management. Prior to Purview, she led the investment team at Windhaven Investments. Previously, Linda is an experienced portfolio manager of global multi-asset funds at institutional asset management companies, including Blackrock, MFS and State Street Research. She started her career as a quant analyst at Baring Asset Management. Linda is a co-founder and a board member of Women in ETFs. She is a recipient of Top Women in Asset Management Awards 2015 by Money Management Executives. She has published in finance journals and made frequent contributions to industry conferences and business media such as Bloomberg News, Bloomberg TV, FT, ETF.com, MarketWatch. She received her B.A. from University of Regina, Canada, a Master's degree in Applied Economics and a Ph.D in Finance from University of Massachusetts at Amherst. She lives with her family in Manhattan, New York City.

Jeff Cohen, Product Strategist, SASB

Jeff Cohen serves as an Institutional Product Strategist at the Sustainability Accounting Standards Board (SASB). In his role, Jeff educates and partners with companies, institutional investors, and asset owners facilitating dialogue on financially material industry specific ESG topics and metrics for implementation into business strategy and investment decision making. Jeff has a background in ESG & Impact investing across asset classes and investment strategies. Prior to joining SASB, Jeff was Head of Business Development at Sonen Capital an ESG & Impact dedicated OCIO, where he worked with investors seeking to achieve impact across asset classes and various environmental and social themes. Prior to Sonen, Jeff was a Director of Investment Opportunities at Venovate, a Fin-tech platform connecting institutional investors with unique private placement investments, where he conducted due diligence on direct company investments across business stages. Jeff has spent his career working with sophisticated investors at organizations such as Deutchse Bank, Merrill Lynch, and Gerson Lerhman Group. He holds an MBA from Georgetown University and a BBA from the University of Michigan. Jeff is a CAIA charter holder, Fundamentals of Sustainability Accounting Credential Holder, and in his free time loves to play golf and go hiking with his wife and dog.

Christina L. Alfandary, Managing Director, Gabelli Funds (GAMCO - ESG)

Christina L. Alfandary is Managing Director, Environmental, Social & Governance (ESG) and Sustainable Investments at GAMCO Asset Management, the institutional affiliate of Gabelli Asset Management Company. At GAMCO, Ms. Alfandary leads the company's expansion of its ESG integration efforts and ESG investing capabilities. Ms. Alfandary has over twenty-five years of experience in the investment business. Prior to re-joining GAMCO, she served as Senior Managing Director, Co-Head of Nikko Asset Management Americas, Inc., working as part of a senior management team as the firm underwent a major restructuring resulting in its growth from $50 billion to $150 billion AUM. While there, she initiated North American business development and later managed the US business. She was also instrumental in a US product launch of an innovative impact investing Green Bond product developed in collaboration with the World Bank. Prior to Nikko AM, she was a Vice President at GAMCO Investors from 2000 to 2005 where she worked with institutional and high net worth clients. Her investment experience includes working at Morgan Stanley from 1990 to 2000, both in institutional fixed income as well as an analyst in municipal finance.

Ms. Alfandary is a frequent speaker related to ESG. She is a guest lecturer on ESG investing at Fordham University in its Impact Investing course. She is also a member of the Board of Trustees of the Thacher School, a California Green Ribbon school. A native of California, Ms. Alfandary received an M.B.A. in Finance from Columbia Business School after earning her B.A. from Lewis & Clark College.

Obie L. McKenzie, Managing Director, BlackRock

Obie McKenzie, Managing Director**,** is a member of the US and Canada Institutional team within BlackRock's Institutional Client Business. He is responsible for developing and maintaining relationships with institutional investors, including public and private pension plans.

Mr. McKenzie's service with the firm dates back to 2000, including his years with Merrill Lynch Investment Managers (MLIM), which merged with BlackRock in 2006. At MLIM, he was a managing director for Public Funds Marketing. His responsibilities include distribution of institutional investment management capabilities through a regionally organized public funds sales team. Prior to joining MLIM, Mr. McKenzie served as a managing director for UBS Asset

Management and as an executive director with UBS Brinson in New York. He is President Emeritus of the Association of Investment Management Sales Executives (AIMSE) as well as a founding member of the National Association of Securities Professionals (NASP) and a founding board member of the Robert A. Toigo Foundation, an MBA candidate scholarship program.

Mr. McKenzie earned a BS degree from Tennessee State University and an MBA degree in finance from Harvard Graduate School of Business.

Bhakti Mirchandani, Managing Director, FCLT Global

Bhakti Mirchandani is a Managing Director at FCLT Global, a consortium of asset owners, asset managers, and corporations focused on long-termism, where she focuses on identifying and measuring the drivers of long-term value creation and investment stewardship. Her transaction experience spans the capital structure and phases of investment and includes a longstanding focus on sustainable investing. She teaches a graduate level impact finance course at Columbia's Earth Institute and is Forbes.com sustainable investing contributor. She is Co-Chair of the Council on Foreign Relations Term Member Advisory Committee and an advisor, board member, or investment committee member of multiple impact investment firms and funds: ACCION Venture Labs; Upaya Social Ventures; Contact Fund; and MicroVest Capital Management Enhanced Debt Fund. She holds a BA, MBA, and MPA from Harvard.

Arjun Batra, CIO, Lendable Marketplace

Arjun Batra is the Co-Founder and Chief Investment Officer of Lendable, a financier of direct lending platforms and helping to create a credit ecosystem in SME and consumer credit in under-banked Africa. Prior to joining Lendable, Arjun worked for BlackRock, where he led strategic initiatives focused on helping the firm transition into a digital investment landscape. This included initiatives ranging from electronic bond trading for institutional money managers to online financial advice for retail investors. Prior to BlackRock, Arjun worked on M&A and restructuring assignments at Houlihan Lokey.

Arjun graduated from the University of Pennsylvania with degrees in Electrical Engineering and Finance. He grew up in India and Nigeria, where he witnessed the extreme conditions in which most people live. He is passionate about using technology and finance to empower low-income individuals.

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Wole Coaxum, CEO, Mobility Capital Finance

Wole C. Coaxum is a Founder and Chief Executive Officer of Mobility Capital Finance, Inc. ("MoCaFi"). MoCaFi is a start-up financial technology company that leverages mobile technologies, data analytics and digital strategies to improve the financial behaviors of underbanked communities.

Our goal is to move people away from high cost alternative financial services products, e.g. payday lenders, check cashiers, pawn shops, etc., and into the financial mainstream, so communities can live healthy and productive financial lives.

Prior to starting MoCaFi in 2015, Wole served as Managing Director at JPMorgan Chase where he held a series of leadership positions in Business Banking, Card Services, and Treasury & Securities Services.

Prior to joining JPMorgan in 2007, Wole was a senior executive of Willis Towers Watson, where he served as Chief Financial Officer & Chief Operating Officer of Willis North America and Chief Executive Officer of Willis Canada. He started his career at Citigroup working in investment banking, asset management, insurance and corporate functions.

Wole currently serves as a Trustee of Phillips Exeter Academy and is on the Board of the Williamstown Theatre Festival. He is the former the Chairman of the Board for Phoenix House New York and member of the Phoenix House Foundation Board. He is the recipient of the Harlem YMCA – Black Achievers in Industry Award.

He has a Masters of Business Administration degree with a concentration in Finance from New York University, a Bachelor of Arts degree with a major in History from Williams College and studied Politics, Philosophy and Economics at Exeter College, Oxford University.

Wole lives in Westchester County, NY with his wife Kim and their two daughters Quinn and Avery.

Danielle Kayembe, Founder, GreyFire Impact

Danielle is a female futurist and serial entrepreneur who works on projects at the intersection of women, tech and social impact. Through her company GreyFire, she advises female founders on scaling their businesses and raising capital, and connects companies to ecosystems of underrepresented founders. Danielle was a founding partner in Tour of Tech: Lagos, an initiative to bring investors from Silicon Valley (TechStars, 500 Startups, Wingpact) to tour growing tech hubs in Africa. Danielle is an advisor to social impact startups and a mentor to Columbia University's business accelerator. Danielle is an Ariane de Rothschild Fellow for 2019, awarded to 20 Global Social Impact Entrepreneurs each year. She is a frequent speaker on topics related to women, social impact, technology and Africa on CNBC, at the United Nations, TEDx, Google, General Assembly and other events, and has been featured in Forbes and Refinery29. She is also the author of "The Silent Rise of the Female-Driven Economy" a white paper on women and the future of business and innovation.

Katherine St. Onge, Director, Calvert Impact Capital

Katherine St. Onge is Director of Syndications and Institutional Partnerships at Calvert Impact Capital. She helps institutions structure fixed-income investments to support Calvert Impact Capital and the mission-driven organizations within CIC's portfolio, through a variety of investments including subordinated debt, the Community Investment Note and syndication transactions. Prior to Calvert Impact Capital, Katherine worked at the Aspen Institute where she focused on building entrepreneurial and early-stage investment ecosystems in the Middle East and North Africa. She also worked for Louisiana Economic Development, crafting policies and strategies to enhance the state's economic competitiveness, and Goldman Sachs, managing both equity and fixed-income investment products. She received her Bachelor's Degree in economics and mathematics from Bucknell University and her M.B.A. from the Wharton School at the University of Pennsylvania.

Derwin Sisnett, Partner, Maslow Development Inc.

A native New Yorker, Derwin Sisnett was born and raised in a neighborhood in desperate need of revitalization. While he attended a high performing high school in an affluent part of the city, his daily commute to and from school highlighted the stark contrast between the two neighborhoods. His passion for developing holistic communities was born from his experiences. Derwin has spent the last decade in community development and public education, with a particular focus on maximizing community assets.

Prior to founding Maslow, Derwin co-founded and served as the CEO of Gestalt Community Schools (GCS), a charter management organization that develops high-performing, community-based charter schools in Memphis, Tennessee. Under his leadership, GCS grew into one of the highest-performing networks of schools in Tennessee.

Derwin earned a BA in Psychology from Emory University, an MFA in Creative Writing from Hollins University, and is currently wrapping up a PhD in Educational Psychology from the University of Memphis. Derwin is also a Pahara-Aspen Fellow and a Broad Academy Fellow.

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Avi Telyas, Founder, Makerhoods

Avi Telyas is an American real estate developer, serial entrepreneur and pioneer in lean manufacturing and construction. His passion for architecture and craft entrepreneurship led him to found *Makerhoods©*, an organization which advocates for urban land use policies that foster self-employment by building affordable working and living space in economically challenged areas.

Mr. Telyas is a 1986 graduate of the Harvard Business School, a former trustee of Pratt Institute and a Principal of Seaview Development where he has worked for over 30 years running complex projects and operations. He embarked on his own entrepreneurial career in 1986 by acquiring a small manufacturer based in New York City while still a Business School student and proceeded to grow the business through its' eventual sale to The Parker Hannifin Corporation. His accomplishments were recognized as runner-up for the Harvard Business School Club of NY, *Entrepreneur-of-the-Year Award* in 1999 and chronicled in an episode of *Managing with Lou Dobbs on CNN* as well as a *Harvard Business School Cases Study* and a featured article in the *Wall Street Journal*.

The Makerhoods© program brings together Mr. Telyas' life-long interest in entrepreneurship and urban development. He continues to advocate for urban planning and design that encourage affordable entrepreneurship and lowers the barriers that working families experience in their quest for a middle class income. In 2015 he introduced the Makerhood© concept to a worldwide audience in a TEDx presentation in Jersey City, and in 2017 Mr. Telyas delivered the Keynote address at the *Governor's Conference on Housing and Economic Development* in Atlantic City, New Jersey.

Mr. Telyas devotes his free time to pro-bono consulting for various charitable and nonprofit organization it the metropolitan area such as Grameen Bank, a micro-loan innovator targeting low-income entrepreneurs and Urban Pathways, a developer of supportive housing.

Mickey Penzer, Vice President, Penzer Family Office

Mickey received her Bachelors and Masters in Accounting from Stern School of Business and her law Degree from Fordham. She took a lot of classes at Fordham on the subject of working with governments and is excited to be back as an alumnus to participate in this conference.

Mickey has worked with her family real estate business since she was a small child; her mom had a tiny hard hat made for her for sight tours. Her paternal grandfather was the first to enter the business and her father Richard, started building his portfolio as a teenager. She works in the staffing industry specifically focusing on real estate placements while continuing to work for her real estate focused family office and family foundation, The Jacob & Anita Penzer Family Foundation. Her family invests in real estate, primarily in NYC, but what really brings them together is their passion for poverty alleviation, particularly in the NYC area. She and her family have set up At-Risk Community Services in order to help the residents of NYCHA (NYC public housing) and other low-income residents of NYC gain proper participation in their housing and receive better living conditions. Her passion is to use her lifelong real estate experience, combined with her knowledge of social services, government, philanthropy and social entrepreneurship to create socially conscious real estate projects. She wants to holistically redesign what it looks like to live in a low-income community. Let's Build a better world together!

Paul Johnson, Fordham University, Nicusa Investment Advisors

Paul is a partner with Harbor Peak, a financial services firm that provides advisory services to companies and governments on issues related to digital currency, ICOs, and token-based business models. Harbor Peak services include market analysis, ICO due diligence, risk and compliance, and regulatory policy.

Paul helped launch Blockhous Academy in July 2018, is the Economic Advisor to the SolarCoin Foundation, and is a member of the Advisory Board to the People's Currency Foundation and its Manna coin project. Paul has appeared as a moderator and panel member at numerous blockchain conferences discussing cryptocurrency regulation, compliance and fraud.

Paul is an Adjunct Professor at the Gabelli School of Business, Fordham University, where he teaches courses on digital currency, blockchain technology, and value investing. Paul's class on blockchain is working to launch the Jesuit Token, with the mission of using technology to incentivize and reward 25 million hours of community service in the next 20 years. In addition to serving as an Adjunct Professor, Paul is a Fellow in the Gabelli Center for Global Security Analysis and received the Gabelli School of Business' graduate-level *Dean's Award for Faculty Excellence* in May 2017.

Paul has an MBA in Finance from the Executive Program at the Wharton School of the University of Pennsylvania and a B.A. in Economics from the University of California, Berkeley.

Jarrid Tingle, Co-Founder, Harlem Capital Partners

Jarrid Tingle is Co-founder and Managing Partner of Harlem Capital, a venture capital firm on a mission to change the face of entrepreneurship by investing in 1,000 women and minority founders over the next 20 years. He focuses on deal sourcing, organizational strategy, financial analysis, and due diligence efforts. Jarrid has been featured in Forbes and Black Enterprise in 2018. He is currently an MBA Candidate at Harvard Business School. He graduated *cum laude* from the Wharton

School of the University of Pennsylvania. Upon graduation, Jarrid received the Wharton Undergraduate Dean's Award for Excellence (Wharton's highest honor).

Prior to Harlem Capital, Jarrid was a Private Equity Investor at ICV Partners. At ICV, he was responsible for evaluating over 100 control investment opportunities annually, constructing financial models, and monitoring four portfolio companies to assist with annual budgets and strategic initiatives. Before ICV, he worked in the Global Technology, Media & Telecommunications Investment Banking Group at Barclays. Outside of Harlem Capital and HBS, Jarrid is Graduate Board Vice President for the Eta Chapter of Delta Phi Fraternity, a mentor in the TEAK program, and a fellow in the Robert Toigo Foundation and Management Leadership for Tomorrow MBA Programs.

Leslie Harwell, Managing Partner, Alante Capital

Leslie is Managing Partner at Alante Capital, a Venture Capital fund that invests in innovations across the lifecycle of apparel in production, distribution and post-consumer recovery. Alante aims to make it easier for brands & retailers, of all sizes, to produce & sell sustainable apparel by working with them to actively integrate new solutions to make the lifecycle of apparel safer, cleaner, less wasteful, and overall more sustainable.

Prior to Alante, Leslie spent 10 years in financial services, most recently as Vice President of Sustainable Finance at JPMorgan Chase & Co., focused on value creation and technical assistance in the firm's impact investing portfolio.

Leslie is passionate about scalable, tech-enabled solutions that will leave lasting, positive impacts on people and the planet.

Chinedu Enekwe, Managing Parnter, Affiniti VC

Chinedu Enekwe is the founding partner of AffinitiVC a venture capital platform investing in a future of shared prosperity. He's a Moonshot Fellow of the Kravis Lab for Social Innovation and a founding member of the Forbes Impact Community. He manages the largest syndicate of underrepresented angel and micro-VC investors, AffinitiVC's Venture Community, and built deep collaboration with 3 General Partners, which form the foundation of AffinitiVC's family of funds. This compliments the company's advisory practice that manages $25M in strategic funds for a healthcare technology company and the gender lens investment strategy for Shell Foundation.

Before launching AffinitiVC, Chinedu co-founded tiphub and managed its pre-accelerator program, Diaspora Demo, which supported over 35 early stage technology and social enterprises raise over $7 Million in after program funding and achieve 3 exits since 2014. Chinedu also led emerging market investment manager, Xcellon Capital, serving as investment director, raising and managing $25 Million of assets from institutional and high net worth investors, after holding positions in infrastructure advisory at the World Bank and OPIC, investment banking at Merrill Lynch and fund formation and corporate securities law at Weil Gotshal and Manges.

Bahiyah Robinson, Founder, The VC Include

Bahiyah is the founder of VC Include, an advocacy and data-driven membership organization that connects female and diverse GPs with LPs that care about returns, inclusion and impact. We're building a membership network of VCs and LPs, supported by fund of funds, top corporations and city stakeholders.

VC Include gives LPs a one stop shop to commit and invest their capital into female and diverse VCs that are part of our network, and to share experiences globally that shift the VC and investor landscape to a more global, supportive, inclusive and impactful space where investment can be accelerated across verticals and across communities.

Catarina Schwab, Co-Founder, CEO, NPX

Catarina Schwab is the Co-Founder & Co-CEO of NPX where she is leading the charge to transform the way impact is financed in the nonprofit sector with her Co-Founder & Co-CEO Lindsay Beck.

Before NPX, Catarina was the VP, Development at the nonprofit buildOn. During her five-year tenure, she expanded the donor base and raised awareness for buildOn's domestic and international programs. Despite her great passion for the work, she was frustrated by the inefficient fundraising model and felt motivated to explore a new approach.

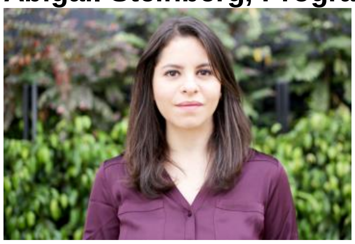
Prior to buildOn, Catarina was the Co-Founder of Flicka Boutique, a Scandinavian fashion and design store in San Francisco selected as a must-visit destination by InStyle and Lucky magazines.

Catarina's desire to start her own business came from her previous experience at the venture capital firm, Arts Alliance where she invested in early stage technology companies in Europe and the United States. In 2001, she moved to San Francisco to join one of the portfolio companies as the Director of Strategy to deepen her operating experience.

Throughout Catarina's career she has dedicated her time to her alma maters, Princeton University and Phillips Exeter Academy, and various nonprofits. She currently serves on the buildOn Global Leadership Council, Common Sense Media Bay Area Council, Katherine Delmar Burke School Board, and NationSwell Council.

She lives in San Francisco with her husband and two children. In her downtime, she enjoys yoga, skiing, photography, visiting her extended family in Europe and traveling to new places.

Abigail Steinberg, Program Manager, FIBR



Abigail is a Program Manager, overseeing the FIBR project, which seeks to deepen and accelerate indirect financial inclusion through linkages between small businesses and their customers, employees and suppliers. She has worked in challenging environments across 11 countries and has honed her skills in strategy and execution. Prior to BFA Global, she was a principal at the Fortitude Fund and was the Director of Strategy for Dallant Networks. There, her work focused on development and execution of online digital communities that build social impact and address global urban poverty. While living in India, she worked on building an Indian financial tech company, aimed at digitizing products for lending clubs. As a Princeton Fellow, she directed project implementations across Thailand. As a strategist reporting to the CEO at Digital Divide Data (DDD), an impact sourcing company with 1,200 employees, she designed and expanded service offerings. She negotiated a contract with the World Bank Group and managed a team across 4 African countries. Based on this work, she was the lead author of an article in MIT's Innovations: Technology | Governance | Globalization journal and spoke at the UN in Bangkok. She presented on a panel for the World Bank on digital employment access for refugees. Prior to DDD, she was a Partnerships Fellow for Purpose Global, which creates its own ventures, develops technology and collaborates with leading organizations to build movements for good. In the UK, she reported directly to a female Member of Parliament, and drafted policies, briefings, and met with constituents. She graduated with a BA magna cum laude and an MA in Global Studies, both from Brandeis University.

Ethan Powell, Founder, Impact Shares

Mr. Powell, has spent over two decades in financial services, primarily in Hedge Fund and Private Equity. Most recently Ethan founded Impact Shares. Impact Shares is a collaboration of leading financial service and non-profit organizations providing single social issue ESG solutions. Impact Shares has issued exchanged traded funds in collaboration with The NAACP Minority Empowerment ETF (Ticker: NACP), the YWCA Women's Empowerment (Ticker: WOMN) and the United Nations Sustainable Development Goals (Ticker: SDGA). Additionally, Ethan serves as the Chairman of the board for a $4 billion mutual fund complex and is a finalist for 2016 mutual fund director of the year. Previously, Mr. Powell was the Chief of Product and Strategy at Highland Capital Management Fund Advisors, L.P. In this role he was responsible for evaluating and optimizing the registered product lineup offered by Highland Mr. Powell also served as the portfolio manager of the Highland ETFs and worked with other portfolio managers and wholesalers on the appropriate positioning of strategies in the market place. Prior to joining Highland in April 2007, Mr. Powell spent most of his career with Ernst and Young providing audit and merger and acquisition services. Mr. Powell received an MS in Management Information Systems and a BS in Accounting from Texas A&M University. Mr. Powell has earned the right to use the Chartered Financial Analyst designation and is a licensed Certified Public Accountant.

Marcia Nelson, Managing Director, Aberleen Family Office Solutions

Marcia Nelson is a Managing Director of Alberleen Family Office Solutions, an investment platform for private investors, where she focuses her time and energy on building and maintaining her network of family offices and private investors. Ms. Nelson has a 20-year track record of working with family offices and their advisors, having developed a strong network of investors seeking direct and co-investment opportunities, collaborating with other families and creating thought leadership around impact investing and philanthropic giving. She started her family-office career working for an ultra-high-net-worth philanthropic family, and subsequently managed business development and relationship management in the areas of estate planning, finance and accounting.

Ms. Nelson serves as the Executive VP of the board of ACG-NY (Association for Corporate Growth), and is a member of the Family Office Committee. She is also on the board of VentureCapital.org, which mentors and advises early stage companies. Ms. Nelson completed her undergraduate work in her home state of Utah, and her MBA at Fordham.

Andrew Appel, Creative Director, Gitterman Wealth Management

Andrew is the Creative Director for Gitterman Wealth Management's SMART (***S****ustainability* ***M****etrics* ***A****pplied to* ***R****isk* ***T****olerance*)® Investing Services, which offers Sustainable, Impact and ESG Investing options to both investors and other financial advisors. He is also a founding member of the 2018 Sustainable Investing Conference at the United Nations, as well as the 2017 and 2016 NYC Sustainable Investing Conferences.

Andrew first began working with Jeff Gitterman as a consultant in 2008, and during that time they co-authored the book, *Beyond Success; Redefining the Meaning of Prosperity,* and also Associate Produced the feature documentary film, *Planetary*.

Prior to this, Andrew spent 10 years in the entertainment industry, both as an actor and in production and development for a variety of film and television companies in California and New York. He is a Phi Beta Kappa graduate of the University of Wisconsin-Madison, and has also spent time at Oxford University and USC Graduate Film School.