Raymond A. Mason
School of Business
at William & Mary

WOMEN'S STOCK PITCH & LEADERSHIP SUMMIT

March 29-30, 2019
mason.wm.edu/wsp

Leaders,

Thank you for joining us for the 4th Annual Women's Stock Pitch & Leadership Summit.

Many hours and resources have been dedicated to making this weekend impactful, and we hope that you are able to capitalize on everything that you learn and the connections you make.

This event would not be possible without the incredible support of exceptional individuals and generous organizations. A special thanks goes out to our sponsors; Alice Davison, Todd & Katie Boehly, Francis C. Engoron, Matthew B. Siano, Esq., Rick & Susan Stanley, Kate Willever, EY, Morgan Stanley, Capital Group, J.P. Morgan Chase, Scotiabank, T. Rowe Price, UBS, BNY Mellon, Cboe Global Markets, IBM, Momentum Advisors, BlackRock, and CAPTRUST. We have also partnered with three non-profit organizations, the CFA Institute, 100 Women in Finance and the Forte Foundation, who share our mission to promote women and encourage diversity in business.

We are inspired by the leadership and vision of our Smart Woman Securities and Women in Business student officers, who have been instrumental in executing the stock pitch competition and summit. We appreciate the guidance and support of our incredible advisory council: Dawn Arnall, Cindy Davis, Alice Davison, John Leone, Lisa Petrelli, Lisa Roday, and Kate Willever. The planning team has worked tirelessly behind the scenes collaborating with numerous professionals, faculty, staff, and students to produce an event which educates, inspires and empowers us all; we are deeply grateful.

There is something hopeful and powerful about bringing together such remarkable people from across the country and the world to engage in a common purpose; to compete, to develop, and to educate. Thank you for adding your voice to this conversation and your energy to this cause. We applaud you and embrace you as we seek to develop the next generation of leaders.

Sincerely,

Kristyn Allred
Program Director
Women's Stock Pitch & Leadership Summit

Jim Haltiner
Professor Emeritus in Finance
Co-Director of the Boehly Center

Carl Tack
Visiting Clinical Professor
Co-Director of the Boehly Center

SCHEDULE

Friday, March 29th

4:00 pm Corporate Information Sessions
5:30 pm Keynote in Brinkley Commons
6:30 pm Reception/Dinner, Williamsburg Lodge

Saturday, March 30th

7:30 am Check-in for Teams and Judges
8:00 am Preliminary round begins
10:15 am Break, judges deliberate
10:25 am Final round winners announced
11:00 am Final round begins
12:35 pm Lunch begins
1:00 pm Lunch keynote
1:20 pm Judges announce winners
1:30 pm Break
1:45 pm Panel one
2:45 pm Break
3:00 pm Panel two
4:00 pm Break
4:15 pm Coaching session
5:45 pm Farewell and photo
6:00 pm Professional reception

2019 Sponsors and Endorsements

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100 Women in Finance

ABOUT THE STOCK PITCH COMPETITION

The Stock Pitch Competition brings together outstanding students from top universities (below). Representatives from leading financial firms will be judging the competition, as they are eager to engage with some of the brightest young women in the country.

Stock pitch events across the country are primarily made up of homogeneous teams thereby impeding a diverse perspective. Gender diversity promotes cognitive diversity, and cognitive diversity provides businesses a distinct competitive advantage. The goal of the competition, now in its fourth year, is to expose students from varied backgrounds to careers in finance. The William & Mary chapter of Smart Woman Securities (SWS) invites stock pitch teams from top-ranked universities across the country and the world.

This competition enables participants to gain invaluable real world experience by presenting an investment opportunity with a long term horizon.

KEYNOTE SPEAKER

Kelly Grier

Kelly Grier is EY's US Chairman & Managing Partner and Americas Managing Partner, leading more than 72,000 people in 31 countries, with annual revenue of $15.6 billion. Ms. Grier chairs the US Executive Committee and Americas Operating Executive and represents EY in regulatory relationships. Her global leadership portfolio includes membership on EY's Global Executive, Global Practice Group and Global Accounts Committee, and she serves as Executive Sponsor for EY's worldwide focus on diversity and inclusiveness. During her 28-year tenure at EY, Ms. Grier has had extensive experience working around the globe as a client service partner and senior advisor on Fortune 500 Audit and Advisory clients. Kelly is now a senior advisory partner on several of EY's largest accounts, as well as a Certified Public Accountant. Ms. Grier previously was Vice Chair, Central Regional Managing Partner, where she led 10,000 professionals across 15 states and 17 offices. Kelly also served as Americas Vice Chair, Talent, where she focused on creating an exceptional experience for all EY people in the Americas, and served on the Global Talent Executive. Outside of the office, Ms. Grier enjoys running, golfing, and traveling with her husband, John, and son, Jack.

LUNCH KEYNOTE

ANN BENJAMIN

Ann Benjamin is a private investor and philanthropist. After 34 years in the investment management business, she retired at the end of 2015. Prior to retiring, she served as Managing Director and Chief Investment Officer of Global Non-Investment Grade strategies at Neuberger Berman LLC, also known as Lincoln Capital Management Company and formerly a division of Lehmann Brothers Holding Company. While at Neuberger, Ann founded a global institutional and fund management business in 1997, investing in bank loans, high yield bonds, and distressed debt. She managed and grew the business to over $40 billion in assets under management, one of Neuberger Berman's largest business units. While at the firm, Ann played a key management role serving on the Partnership Committee and the Global Fixed Income Strategy Committee.

Retired Managing Director,
Nueberger Berman LLC

Before joining Neuberger Berman, Ann worked as a portfolio manager in the institutional and fund management business at Stein Roe and Farnham, Inc., and Allstate Insurance Company, both based in Chicago. Prior to that Ann was a leverage buyout analyst for Westinghouse Credit Corporation and Henderson Investment Corporation in Pittsburgh, Pennsylvania. Throughout her investment management career, Ann achieved top quartile and top decile investment performance in her peer group and was widely recognized as a Five Star fund manager by Morningstar.

Ann was born and raised in Pittsburgh, Pennsylvania and holds a Bachelor's degree in Economics from Chatham University and a Master's degree in Public Management from Carnegie Mellon University. She serves on the Board of Trustees of the Lincoln Park Zoo in Chicago, Illinois and is Trustee for the Naples Chapter of The First Tee. She is also an advisor to Golf Fore Africa in Scottsdale, Arizona. Ann currently resides in Naples, Florida with her husband Blake. They have no children.

2019 ADVISORY COUNCIL

DAWN ARNALL '80, MBA '82

CHAIR, SBP CAPITAL CORPORATION

Dawn Arnall is a private investor, businesswoman and philanthropist. She currently serves as Chair of SBP Capital Corporation. A seasoned executive with more than two decades of professional experience in the financial services and real estate industries, Ms. Arnall is an active investor in energy, insurance, and technology sectors. She is a director on the Board of Conservation International, a member of the Smithsonian National Zoological Advisory Board, a Trustee of The College of William & Mary Foundation Board, and former Chair of National Geographic's International Council of Advisors. She also is a member of the George W. Bush Institute's Woman's Advisory Board, serves on the executive committee of the Simon Wiesenthal Center and is a supporter of Shalva, a therapy center for mentally and physically challenged children. Ms. Arnall obtained her BA and MBA from William & Mary.

CINDY DAVIS '80

PANELIST & COACH

EXECUTIVE VICE PRESIDENT AND CHIEF DIGITAL MARKETING OFFICER, L BRANDS

Cindy Davis serves as executive vice president and chief digital marketing officer at L Brands, a diversified specialty retailer based in Columbus, Ohio. Founded in 1963, L Brands operates specialty stores through Victoria's Secret, PINK, Bath & Body Works, La Senza, and Henri Bendel. In this newly created enterprise role, she is responsible for innovating marketing solutions to drive growth across brands and geographies, accelerating digital capabilities company-wide, and building loyal customer relationships. Prior to joining L Brands in 2018, Cindy served as executive vice president, consumer experience at Disney/ABC Television. She also held leadership positions at Walmart, Inc., Sam's Club, Yum! Brands, Rapp Collins Worldwide, and BBDO Advertising. Cindy graduated with a Bachelor's degree in Business Administration from William & Mary, Williamsburg, Virginia; and a Master's degree in International Marketing from American Graduate School of International Management (Thunderbird), Phoenix, Arizona. Cindy is an advocate for the advancement of women in business and, along with her husband Rob, works passionately to support our veterans and active duty military.

ALICE T. DAVISON P'16

SPONSOR, PANELIST & COACH

DIRECTOR, GLOBAL BUSINESS SERVICES, CAPITAL GROUP

Alice Davison serves as Director of Global Business Services at Capital Group in New York. Ms. Davison has over 25 years of industry experience, all with Capital Group. Earlier in her career at Capital, she worked as manager of The Associates Program (TAP), a two-year series of work assignments in various areas of the organization. Ms. Davison was also a TAP participant. She holds an MBA with distinction from the Stern School of Business at New York University and a Bachelor's degree in Economics from Bowdoin College. She serves on the Board of Directors for the Forte Foundation and is an active volunteer for NJ SEEDS, Grameen Foundation, and the William & Mary Business School Foundation Board.

JOHN LEONE '91

COACH

FORMER TRADER

Prior to his 2018 departure, John Leone worked with Stevens Capital or its associated companies for 27 years. Mr. Leone was primarily responsible for accessing global exchanges, equity financing structures, and prime broker management. During his career, he has established connectivity to 30+ global exchanges, researched market structure, and maintained relationships with global exchanges and brokerages. Current and prior professional associations include: The New York Stock Exchange Institutional Traders Advisory Committee, the Boehly Center Officers Council, CBOE Institutional Traders Advisory Committee, the NASDAQ Stock Exchange Quality of Markets Committee and Investment Company Institute Working Group Market Structure and Investor Confidence. Mr. Leone holds a BA in Economics from William & Mary, is a CFA Institute Charterholder and recipient of the Howard J. Busbee Finance Adademy Alumni Award.

LISA PETRELLI

SPONSOR, JUDGE & PANELIST

MANAGING DIRECTOR AND HEAD OF EQUITIES IN CANADA, UBS

In her roles at UBS, Lisa Petrelli bears all regulatory, operational and risk oversight for the Investment Banking (IB) in Canada and oversees both UBS Canada Wealth Management and Asset Management as part of the UBS Americas Country Management Committee. Currently, Ms. Petrelli participates in the UBS America's Operating Committee, America's Risk Committee, and UBS' Extended Americas Management Committee. Ms. Petrelli has over 25 years of experience with a number of Wall Street firms and her primary area of experience has been in international trading. Prior to UBS, Ms. Petrelli worked at Goldman Sachs, Credit Suisse, and Morgan Stanley, and has been active in trading all equity products. Ms. Petrelli has been an active participant through her career in diversity and gender initiatives. Currently, Ms. Petrelli oversees the Women Of Investment Bank committee at UBS IB, is part of IB's Diversity and Inclusion council, and is on UBS' All Bar None Advisory Council. Ms. Petrelli is a Global Advisory Board member for 100 Women in Finance and also serves on University of Toronto's (UTM) Governing Council. Ms. Petrelli is an undergraduate from the University of Toronto, holds a Master's degree from Wilfrid Laurier University, is a CFA charter holder and Institute of Corporate Directors designate.

LISA RODAY P'14

COACH

PRESIDENT AND CHIEF EXECUTIVE OFFICER, FIREICE SOLUTIONS, LLC

Lisa Roday is the President and Chief Executive Officer of FireIce Solutions, LLC and has been self-employed for twenty years, providing legal expertise to a variety of individuals and business areas. She serves on the boards of The Collegiate School in Richmond and Congregation Or Atid in Henrico, where she also chairs the Board of Trustees and founded its Endowment Fund. She and her husband, Leon, are the parents of two William & Mary alumni, Harrison and Ethan. In addition to being a member of the W&M Board of Visitors Executive Committee, Ms. Roday serves as Vice Chair of the Committee on Student Engagement and was a member of the Presidential Search Committee. Previously, Ms. Roday practiced matrimonial law in New York City where she served as her firm's Managing Partner. She served on the Board of the American Academy of Matrimonial Lawyers (New York Chapter) and was a founder of the Network for Women's Services, an organization that mentored young lawyers who represented victims of domestic violence on a pro bono basis. Ms. Roday established the March of Dimes NICU Family Support program at Henrico Doctors' Hospital in Richmond and served as a Specialist from 2008 to 2011.

KATE WILLEVER '07, MBA '09

SPONSOR, PANELIST & COACH

EXECUTIVE DIRECTOR, DIGITAL AND STRATEGIC ANALYTICS, MORGAN STANLEY

Kate Willever is an Executive Director of Digital Analytics at Morgan Stanley Wealth Management. Ms. Willever is based in Purchase, New York and is responsible for all things analytics as they relate to Digital offerings at Morgan Stanley. She manages a cross-functional and international team focused on measuring the impact of Digital programs and tools leveraged by Financial Advisors and Morgan Stanley Clients. Prior to Morgan Stanley, Ms. Willever spent time on the Product team at a Fintech start-up focused on thematic investing - Motif Investing. Prior to Motif, Ms. Willever spent 6 years as a Wealth Management and Financial Markets consultant at IBM. Ms. Willever received an MBA and a BBA from William & Mary where she was a part of the varsity Track and Cross Country teams. She currently resides in Norwalk, CT with her dog, Blair. Outside of work, Ms. Willever enjoys antiquing, reading, running, yoga and is an avid needle pointer.

Women's Stock Pitch
& Leadership Summit

PLANNING COMMITTEE

2019

KRISTYN ALLRED
Associate Director of Alumni Relations at the Raymond A. Mason School of Business

JIM HALTINER
Professor Emeritus in Finance & Co-Director of the Boehly Center for Excellence in Finance

ELIZA MCKENNEY
Post-Baccalaureate Fellow, Boehly Center for Excellence in Finance

CHANTEL SMITH
Senior Director of Development &
Alumni Engagement

GRIFFIN HOMAN
Alumni Engagement Coordinator

RITA MURPHY
Associate Director, Boehly Center
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MEGAN BRANCH
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Marketing Intern, Women's Stock
Pitch & Leadership Summit

CAROLINE ABRUZZO
President, Smart Woman
Securities

MURRAY RYAN
Co-President, Women in Business

OLIVIA VANDE WOUDE
Co-President, Women in Business

About The Boehly Center

The Boehly Center for Excellence in Finance was established in January 2014 through a generous multi-year gift from alumni Todd & Katie Boehly. Benefiting from an exceptionally talented and motivated student body, the Boehly Center is training the next generation of leaders in finance.

The Center provides opportunites for advanced financial training, career exploration, networking, and experiential learning through financial firm-sponsored competitions and courses taught by industry leaders. The Center also offers leadership opportunities for members in our five student run clubs: the Howard J. Busbee Finance Academy, the Financial Modeling Club, the Mason Investment Club, the Women in Business Club, and the Smart Woman Securities Chapter.

Our Comparative Advantage

Through students' close interaction with faculty and other students, the Boehly Center capitalizes on William & Mary's ideal size and offers programs to students across campus, not only Finance majors. These opportunites allow students of all backgrounds to utilize W&M's rich alumni and alumnae network in the financial services industry. Our recent graduates are currently working in finance at top firms including: Goldman Sachs, Google, IBM, The Capital Group, EY, JP Morgan, Morgan Stanley, Capital One, Perella Weinberg Partners, PwC, and The Carlyle Group.

TODD BOEHLY '96

CHAIRMAN & CHIEF EXECUTIVE OFFICER, ELDRIDGE INDUSTRIES

Todd Boehly is Chairman, Chief Executive Officer, and controlling member of Eldridge Industries. Eldridge operates a portfolio of diversified businesses, with over 2500 employees, across several industries. Prior to founding Eldridge, Mr. Boehly was the President of Guggenheim Partners, where he launched their credit investing business and later assumed responsibilities for the asset management business. He received his BBA from William & Mary and studied at the London School of Economics. In addition to being the Chairman and CEO of Eldridge, Mr. Boehly is a member of the Cain International Board and serves as a trustee or board member of several other organizations. He is a principal owner of the Los Angeles Dodgers, Dick Clark Productions, Billboard and The Hollywood Reporter, Media Rights Capital - the owner and producer of House of Cards - and A24 - the owner and producer of Moonlight, winner of the Academy Award for "Best Picture" in 2016. His wife, Katie Garrett Boehly, recieved a BA in History from William & Mary in 1995.

JUDGES

BONNIE BISHOP '88

JUDGE & COACH

MANAGING DIRECTOR, EQUITY CAPITAL MARKETS, RAYMOND JAMES

Bonnie Bishop is a Managing Director at Raymond James and leads the firm's execution of public equity financings for Consumer and Transportation companies. During her tenure at Raymond James, she has helped hundreds of companies raise capital in the public markets. Ms. Bishop also serves on the firm's commitment committee which reviews all prospective public equity offerings. Prior to joining Raymond James in 1998, she was a manager of sales for the Student Loan Marketing Association and served as a private banking officer for SunTrust Bank. She received her BBA degree in Finance from William & Mary in 1988.

JOE BONANNO

SPONSOR, JUDGE & COACH

MANAGING DIRECTOR, HEAD OF DATA STRATEGY, VISUAL ANALYTICS & NEXT BEST ACTION FOR WEALTH MANAGEMENT, MORGAN STANLEY

Joseph Bonanno is Head of Data Strategy, Visual Analytics, & Next Best Action for Morgan Stanley Wealth Management. Mr. Bonanno received his BS from Fordham University and completed his Executive Development Program from the University of Pennsylvania Wharton School. Mr. Bonanno has been at Morgan Stanley for 20 years and has held various leadership roles across Technology, Finance, and the Business sectors. Mr. Bonanno has a track record of providing robust data management and analytics capabilities, governance, and controls while ensuring the most cost effective solutions for the platform. He has actively worked to create a culture that transcends organizational boundaries to enable best-in-class analytics, data integrity, and tools to ensure that business outcomes for all analytics efforts and reports are consistent across the business. Mr. Bonanno actively collaborates with business leaders to develop strategy and governance, which in turn has enabled Morgan Stanley Wealth Management to execute and deliver the Business Analytics agenda.

TOM CAMPANELLI '02

SPONSOR, JUDGE & COACH

CFO, GLOBAL BUSINESS SERVICES DELIVERY, IBM

Thomas Campanelli, MBA is the CFO of Global Business Services Delivery at IBM in Armonk, NY. Mr. Campanelli has held a number of managerial and leadership roles at IBM since joining in 2003. His expertise is in Corporate Financial Planning and Analysis, Pricing, and Operations. Mr. Campanelli earned his BBA from William & Mary in 2002 with a Finance and Economics double major and holds an MBA from Fordham University '08 with concentrations in Finance and Marketing.

MICHELLE DOMANICO

JUDGE & COACH

VP SENIOR CREDIT ANALYST, SHENKMAN CAPITAL

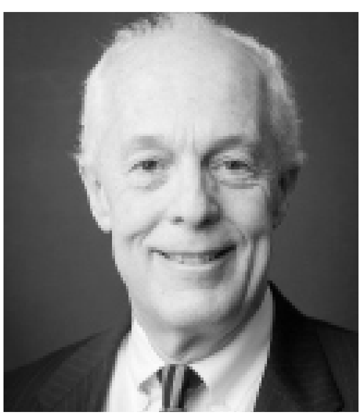
Michelle Domanico joined Shenkman Capital in 2016 based in New York City as a Senior Credit Analyst. Ms. Domanico has 11 years of fixed income experience and is responsible for high yield bond and loan investments in the Consumer, Retail and Food sectors. Previously, Ms. Domanico spent six years working as a Principal on KKR's credit team based out of San Francisco, and she began her career as a leveraged finance analyst at UBS Investment Bank in New York. She received a BS in Economics degree from the University of Pennsylvania, The Wharton School with concentrations in Finance, Accounting, and Legal Studies (2008). In January 2016, Ms. Domanico was honored to be selected as one of Forbes 30 Under 30 in the Finance category.

ANNA DOPKIN

SPONSOR & JUDGE

VICE PRESIDENT, T. ROWE PRICE GROUP, INC.

Anna Dopkin is a vice president of T. Rowe Price Group, Inc., and a strategic project manager in the Equity Division. Previously, she was the director of Equity Research-North America as well as a member of the Equity Steering Committee and Proxy Committee. From 2000 - 2014, Ms. Dopkin managed several key domestic portfolios for T. Rowe Price, including the Financial Services Fund and the Growth & Income Fund. She was also the lead portfolio manager on the U.S. Structured Research Strategy from 2007–2014. Upon joining the firm in 1996, she was an Equity Analyst following financial services stocks. Prior to joining the firm in 1996, Ms. Dopkin worked at Goldman Sachs for seven years in the Mortgage Securities Department in New York and London. She earned a BS, magna cum laude, from The Wharton School, University of Pennsylvania. Ms. Dopkin also has earned the CFA designation. She presently serves on the Board of Trustees of the Baltimore Urban Debate League and Baltimore School for the Arts.



BRETT HAMMOND

SPONSOR, JUDGE & COACH

RESEARCH LEADER, CAPITAL GROUP

Brett Hammond joined Capital Group in 2016 as research leader at the American Funds. With over 22 years of investment industry experience, he previously directed applied index and modeling research teams at MSCI and held a number of positions at TIAA-CREF, where he left as Chief Investment Strategist while working on the creation of target-date funds, inflation-linked bonds, and individual financial advice. He also spent nearly 10 years in Washington, D.C., principally at The National Academies as a member of the senior management team responsible for behavioral and social sciences studies. Mr. Hammond has published over 30 articles and books in the areas of factor investing, institutional and individual asset allocation, pensions, higher education, and public policy. He also served as an Adjunct Professor at The Wharton School and member of the board of the Q Group. Mr. Hammond's education includes BA in Economics and Political Science from the University of California at Santa Cruz and a PhD from the Massachusetts Institute of Technology. He is based in Los Angeles.

JENNIFER HINMAN

SPONSOR, JUDGE & COACH
SENIOR MANAGER AND PARTNER, CAPITAL GROUP

Jennifer L. Hinman is currently a senior manager and partner at Capital Group. Her management responsibilities include the investment research associates and the China industry analysts. Ms. Hinman was an investment analyst covering high yield bond securities for 25 years: 18 years at Capital Group, 4 years at Oaktree Capital Management, and 3 years at Trust Company of the West. Concurrently with her investment responsibilities, Ms. Hinman was a Research Director for Fixed Income and then for the Capital Strategy Research Group. Prior to working in investment management, Ms. Hinman worked in corporate finance and economic research. She holds a BA in Russian Studies from Bucknell University and studied in Moscow. Ms. Hinman is based in Los Angeles.

LAUREN JACOBSON '07

JUDGE & COACH
MANAGING DIRECTOR AND GENERALIST INVESTOR, COLUMBIA INVESTMENT MANAGEMENT COMPANY

Lauren Jacobson is a managing director and generalist investor at Columbia Investment Management Company. Prior to joining Columbia in 2017, Ms. Jacobson spent eight years at the Rockefeller Foundation where she was a Director and member of three person team focused on marketables assets. Her primary responsibilities included managing Rockefeller's absolute return and illiquid distressed portfolios. Ms. Jacobson began her career at Goldman Sachs as an Analyst on the convertible bond desk. Ms. Jacobson graduated from William & Mary in 2007 with a BBA in Finance and is a CFA charter holder.

ROMA KORKMAZSKY '11

SPONSOR, JUDGE & COACH
INVESTMENT SPECIALIST, JP MORGAN

Roma Korkmazsky, CFA, is a Vice President and Investment Specialist at J.P. Morgan's private bank. In this capacity, he provides customized investment solutions, builds portfolios, and provides tailored advice to wealthy individuals and families across the tri-state area. Prior to his current role, Mr. Korkmazsky advised private bank clients located primarily in New Jersey on aspects of investments, banking, and estate planning. He began his career working with corporations to manage foreign currency exposure through derivative risk management. Mr. Korkmazsky is a graduate of William & Mary where he earned a BBA in Finance and Accounting. He is a CFA charter holder and a member of the CFA Institute. He currently lives in New York City and enjoys running, traveling, reading, and rooting for the Yankees.

JULIA MCGRATH '17

SPONSOR, JUDGE & COACH
RESEARCH ASSOCIATE, CAPITAL WORLD INVESTORS

Julia McGrath is an Equity Research Associate at Capital World Investors in New York. She covers U.S. and European Industrials, European Aerospace and Defense, and Canadian Banks. Ms. McGrath graduated from William & Mary in 2017 with a BBA in Finance. At William & Mary she was a member of the Tribe Lacrosse team, Smart Woman Securities, and Finance Academy.

CHRIS PETROVITS '94, MBA '99

JUDGE
ASSOCIATE PROFESSOR OF ACCOUNTING, RAYMOND A. MASON SCHOOL OF BUSINESS, WILLIAM & MARY

Christine Petrovits joined the faculty at the Mason School of Business in 2013. She earned her BBA and her MBA from William & Mary, and her PhD from the University of North Carolina at Chapel Hill. Her research focuses on financial reporting and disclosure in both corporate and not-for-profit organizations and has been published in leading academic journals.

MATTHEW B. SIANO, Esq. '96

SPONSOR, JUDGE & COACH
MANAGING DIRECTOR, GENERAL COUNSEL, TWO SIGMA INVESTMENTS, LLC

Matthew Siano is an alumnus of William & Mary, graduating in the class of '96 as a History and Government double major with a Religion minor. Mr. Siano also wrote an Honors Thesis for the Government Department. He received his JD from Fordham University School of Law in 1999. After graduating from Fordham Law, he started his career at Seward & Kissel LLP as an associate in their Investment Management Group. In July 2004, he started at Two Sigma Investments LLC, a New York-based hedge fund, and became General Counsel in December that year. He was promoted to Managing Director, General Counsel in December 2008 and is responsible for the Firm's legal and compliance functions.

KRIS SINISI

JUDGE & COACH
DIRECTOR OF EQUITY SALES, TELSEY ADVISORY GROUP

Kris Sinisi is a Director of Equity Sales at Telsey Advisory Group (TAG), a boutique firm specializing in all facets of consumer discretionary including: Specialty Retail, Department Stores, Luxury Goods, Hardlines, Gaming, Restaurants, and Real Estate. Ms. Sinisi is based in New York with a focus on institutional asset managers located primarily in the Midwest, Mid Atlantic, and New York regions. Prior to her tenure at TAG, Ms. Sinisi was a Director at UBS, and a Vice President at both Lehman Brothers and Barclays Capital, based in Chicago. Ms. Sinisi received her BS in Human and Organizational Development and Economics from Vanderbilt University.

TOM SPRATT

SPONSOR & JUDGE

VICE PRESIDENT, T. ROWE PRICE GROUP, INC.

Tom Spratt is a Vice President of T. Rowe Price Group, Inc., and manager of the equity associate analyst team. He joined the firm in 1997 as a portfolio assistant in the U.S. Equity Division. In 2000, Mr. Spratt moved to the position of research specialist, providing fundamental research support to a number of investment professionals. In 2004, he added some managerial responsibilities and then in 2007 took over as manager of the associate analyst team. Mr. Spratt earned his BA in Economics from the University of Maryland Baltimore County and has earned the CFA designation.

LAURA THOMAS

SPONSOR, JUDGE & COACH

EXECUTIVE DIRECTOR AND INVESTMENT OFFICER, MORGAN STANLEY

Laura Thomas is an Executive Director at Morgan Stanley. Ms. Thomas is an Investment Officer in the Global Investment Manager Analysis team within the Wealth Management division. Her team is responsible for Non-US equity, Multi-Asset Class and Offshore due diligence. Previously, Ms. Thomas was an international equity analyst for the firm's investment management division. The majority of her career has been focused on investments outside the US. Ms. Thomas attended the University of Minnesota and has a BS from Rosemont College in Management.

TIFFANY THURBER '10

JUDGE, PANELIST, & COACH

VICE PRESIDENT, GOLDMAN SACHS

Tiffany Thurber has been with Goldman Sachs since 2011 and currently serves as a Vice President on the large loan origination team in the IBD Real Estate Financing Group, which deploys the firm's balance sheet for mortgage and mezzanine commercial real estate lending opportunities. She graduated summa cum laude from William & Mary with a BBA in Finance.

PANEL TOPICS

Panel Overview

The Women's Stock Pitch & Leadership Summit is a wonderful opportunity for bright women from William & Mary and more than twenty peer institutions to connect with one another. We thank our panelists for sharing their wisdom and experience that will greatly benefit our remarkable participants.

Panel Session One

Lift Where You Stand: Women Helping Women

Our first panel focuses on how to build up women in your organization. Panelists will highlight the challenges and opportunities that women have in navigating a successful career and offer suggestions on how to help your female colleagues excel. Small groups will discuss real-life scenarios dealing with hostile co-workers and potential mentors.

Panel Session Two

Make Your EQ Work for You: The Key to Networking Success

Our second panel focuses on emotional intelligence and how to use it when interviewing for a job, networking, and developing relationships within your industry. Panelists will discuss the definition of EQ and how emotional intelligence impacts career success. Small groups will discuss how to develop emotional intelligence.

PANELISTS

MICHELLE AVERY '98

PANELIST & COACH

PRESIDENT AND SENIOR MANAGING DIRECTOR, VERIS CONSULTING

Michelle Avery is President and Senior Managing Director at Veris Consulting, which specializes in providing forensic accounting and expert witness services to prominent law firms in domestic and international civil litigation involving complex accounting, financial reporting and economic damage issues. She is responsible for directing forensic accounting services to regulators and attorneys with an emphasis on insurance and financial services. Ms. Avery has significant experience in financial statement analysis; application of statutory accounting principles and U.S. GAAP; and evaluation of complex accounting and financial issues. Ms. Avery has extensive expertise assisting counsel in evaluations of solvency, the evaluation of financial statements and disclosures, and causation and damage assessments. Her work frequently involves allegations of misstated financial statements, inadequate disclosures, auditor malpractice and director and officer liability. Ms. Avery is a member of the Financial Reporting Executive Committee, the senior technical committee of the AICPA for financial reporting. She currently serves as the Chair of the William & Mary Mason School of Accounting Programs Board and on the James Madison University School of Accounting Guiding Executive Board. Ms. Avery is a CPA and is certified in Financial Forensics. Ms. Avery earned a BBA in Accounting from William & Mary.

BERYL BALL P'00

SPONSOR, PANELIST & COACH

SENIOR VICE PRESIDENT, FINANCIAL ADVISOR, CAPTRUST

Beryl Ball joined CAPTRUST in 2008 and serves as senior vice president, financial advisor responsible for providing retirement plan and endowment advisory services. Prior to joining the firm, Beryl served as a senior vice president at SunTrust Bank-MidAtlantic and has worked in the industry since 1982. She has a BA from the University of Richmond and a MA from Purdue University. Beryl was a 2016, 2017 and 2018 NAPA Top Women Advisors All-Star and was among the 300 Most Influential Advisors of 2011. She is a Central Virginia Employee Benefits Council Speaker, an Association of Municipal Retirement Systems Speaker, and was a speaker at NACUBO, Council of Independent Colleges in Virginia.

ANNETTE CALDERON '99

PANELIST

STRATEGY SENIOR PRINCIPAL, ACCENTURE

Annette Calderon is a Senior Principal in Accenture´s Strategy practice and has been serving senior clients for 19 years, helping them manage and adapt to large-scale change and cultural initiatives across industries. Her expertise is in leading and supporting business and organizational change for large-scale transformations. She is passionate about leadership development and coaching. She is also an executive coach to senior leaders, utilizing 360 assessments and personality reports (DISC, FIRO-B, Strengths finder) to enhance an understanding of a leader's style, strengths and development areas. She holds a Bachelor's degree in International Relations and a minor in Business from William & Mary. She is a CTI Co-Active and Gallup coach and certified by the International Coaching Federation (ICF). She is married to Kris Hrones who she met at William & Mary and is a new aunt.

EMILY CLIFFORD '06

SPONSOR, PANELIST & COACH
EXECUTIVE DIRECTOR, J.P. MORGAN

Emily Clifford is an Executive Director and Banker Team Lead of the Financial Institutions Group at the J.P. Morgan Private Bank in Palm Beach, Florida. She is charged with leading a highly specialized group that assists financial principals relocating to Palm Beach. Ms. Clifford and her team are responsible for advising on the unique balance sheet and planning needs for hedge fund and private equity principals. Prior to moving to Palm Beach and joining J.P. Morgan in 2010, Ms. Clifford was a Vice President at Belle Haven Investments in Greenwich, Connecticut where she was responsible for managing the firm's team of analysts and serving as a liaison for private clients and institutional investors. Ms. Clifford graduated from William & Mary with a BA in History. She was a member of the Crew Team and rowed for the Women's Lightweight 8 that captured the ECAC Championship. She holds a Series 7 and 63 securities licenses.

SHIRLEY CRANDALL

PANELIST & COACH
PRESIDENT AND OWNER, CRANDALL & ASSOCIATES

Following graduation from Southwest Texas State with a BBA in Marketing, Shirley Crandall accepted a position in commercial sales for a telecommunications company. After 18 months, she resigned and soon accepted a position at Transport Life Insurance Company. Four years later, Ms. Crandall opened her own insurance agency in 1987, which experienced continued growth due to Ms. Crandall's insurance knowledge, marketing and service skills. The agency was incorporated in 1991 and renamed Crandall & Associates, Inc. In 1995, Crandall & Associates, Inc. became a full service, multi-line insurance agency. Ms. Crandall holds a General Lines Agent license and received the designation of Life Underwriter Training Council Fellow (LUTCF) in 1992. She has served as president of the San Antonio Association of Health Underwriter's and serves on the board of Clarity and Deborah's House non-profit organizations. Ms. Crandall is active in The Oakes Club and the National Association of Women Business Owners (NAWBO). She also served as co-chair of NAWBO's Entrepreneurial Spirit Awards (ESA) luncheon which is a fundraising event to provide scholarships to young women interested in owning their own business. Ms. Crandall resides in San Antonio with her three children.

WHITNEY CRAWFORD '07

PANELIST & COACH
EQUITY ANALYST AND HEALTHCARE SECTOR LEADER, MANULIFE ASSET MANAGEMENT

Whitney Crawford is an equity analyst at Manulife Asset Management in Boston, MA where she directs healthcare investments for its Core Value Team. Her team manages over $20B in assets for institutional and retail investors with a long-term oriented, intrinsic value, and margin of safety driven approach. Ms. Crawford has had several roles in the financial services industry. She started her career on the sell side as a Senior Research Associate at Raymond James on its Large Cap Bank Team. After graduating from business school in 2013, she moved to the buy side working at Fidelity Management & Research Company, covering healthcare, internet and media companies. Ms. Crawford earned her BA from William & Mary in 2007, magna cum laude, and an MBA from the Duke University Fuqua School of Business in 2013 where she was a Forte Fellow, supporting women entrepreneurs. She resides in New York City.

ANNAMARIA DESALVA '90

PANELIST & COACH

VICE CHAIRMAN OF THE BOARD OF DIRECTORS, XPO LOGISTICS

AnnaMaria DeSalva is vice chairman of the board of directors of XPO Logistics (NYSE: XPO), a top ten global logistics provider of cutting edge supply chain solutions, as well as a member of the Board of Governors of Argonne National Laboratory, a science and engineering research national laboratory of the United States Department of Energy. She currently advises the CEO of DowDuPont as the company prepares to separate into three new publicly traded companies in the first half of 2019. From 2014-2018, she served as chief communications officer of DuPont, leading strategic communications, corporate reputation and corporate brand management around the world. Previously, Ms. DeSalva was vice president of corporate affairs at Pfizer; head of the global healthcare practice at Hill & Knowlton; an appointed advisor to the U.S. Food & Drug Administration; and an international public affairs executive and a leader of philanthropy at Bristol-Myers Squibb. She earned her BA with honors from William & Mary in English, and she currently serves on the William & Mary Alumni Association board of directors.

LYNN DILLON '75

PANELIST & COACH

BOARD MEMBER, VARIOUS ORGANIZATIONS

Lynn Dillon graduated from William & Mary in 1975 with a BA in History; she completed her MBA degree (Finance) from George Washington University in 1982. In recent years, she has been active as a community and civic leader, serving in a diversity of positions with 501(c)(3) organizations that support higher education, at-risk communities, and the arts. This has included board and leadership roles with William & Mary (Alumni Association Board, Annual Fund Board, Foundation Board and the Board of Visitors), Wolf Trap Foundation, ARCS Foundation, the Boys & Girls Clubs of Greater Washington, and the Joffrey Ballet. During her career in corporate finance, Ms. Dillon was primarily employed by First Chicago Corporation/Bank One Corporation (now JPMorgan) and led multinational divisions focused on building lead investment banking relationships with Fortune 500 companies. At retirement, she served as SVP and head of the corporate banking operations for the eastern 20-state region of the US. She served as a member of the Corporate Diversity and Corporate Bank Leadership Councils.

BRITTANY EDWARDS

PANELIST & COACH

BOARD MEMBER, VARIOUS ORGANIZATIONS

Brittany Edwards is an Associate and the Sourcing Specialist on the Morgan Stanley Wealth Management Financial Advisor Associate Sourcing and Selection team. As the Sourcing Specialist, she brings together dedicated professionals with distinct experiences, talents, perspectives and cultural identities, leveraging their differences to help her firm achieve its full potential. The FAA Sourcing and Selection Team drives the overall field strategy relative to the sourcing and selection of Financial Advisor Associates for Morgan Stanley Wealth Management. She supports the development of recruiting and proactive sourcing processes for qualified individuals seeking a career as a Financial Advisor. Brittany is also the FAA Diversity Liaison. In this role, she has a focus on building relationships with the Morgan Stanley Wealth Management Diversity and Inclusion team in order to reach a common goal. By working alongside the Diversity and Inclusion organization, she leverages current relationships with multiple colleges/universities and diverse organizations in order to further advance a more inclusive workplace. Brittany earned her degree in Business Administration from SUNY Buffalo.

FRAN ENGORON '70

SPONSOR, PANELIST & COACH

MANAGING DIRECTOR, GOLDEN SEEDS FUND, LP

Fran Engoron was a member of the William & Mary Mason School Foundation Board for 22 years and is currently an emeritus member. She currently chairs the W&M Society of 1918. She has a forty-five year career of consulting, coaching and leadership roles. In over twenty six years with Pricewaterhouse-Coopers and Price Waterhouse, she served a wide range of Fortune 500, governmental and not-for-profit clients. As Senior Partner-Intellectual Capital and CKO, she was a member of Price Waterhouse's US and Global Leadership Teams. At PwC, Ms. Engoron headed a global consultancy business unit and served as Leader of the Firm's $100M Learning and Education organization. In her Firm leadership roles, Ms. Engoron was widely, publicly recognized for her innovations in career management, knowledge management, human capital, learning and leadership development. Since retiring from PwC, Ms. Engoron has been an independent consultant and executive coach. She has also been very active in both corporate and not-for-profit boards as well as angel investing in women entrepreneurs.

BECCA GILDEA '12

SPONSOR, PANELIST & COACH

MANAGER/TREASURY SERVICES CONSULTANT, EY

Becca Gildea is a Manager at Ernst & Young (EY) and provides consulting services to Treasury departments in financial service institutions. Based out of New York, she participated in the Business Advisor Program after graduating from William & Mary in 2012 with a major in Accounting and a concentration in Finance. Four years ago, Ms. Gildea aligned to the Treasury and Liquidity Risk Advisory practice where she has focused on helping financial institutions to develop liquidity and capital management frameworks, including stress testing and funds transfer pricing among other focus areas. While working for EY, the company sponsored Ms. Gildea to attend Wharton's Executive MBA program at the University of Pennsylvania where she will earn her MBA in May 2019.

LUANNE GUTERMUTH '84, P '22

PANELIST & COACH

EXECUTIVE VICE PRESIDENT AND CHIEF ADMINISTRATIVE OFFICER, WGL AND WASHINGTON GAS

Prior to her current positions, Luanne Gutermuth held the position of Senior Vice President, Shared Services and Chief Human Resource Officer for WGL and Washington Gas. In her role as EVP & CAO, Ms. Gutermuth leads key corporate functions across WGL, including Human Resources, Information Technology, Supply Chain, Talent Management & Development, and the Program Management Office. She also oversees key customer-facing activities for Washington Gas, including Sales, Marketing, and Consumer Services. She joined Washington Gas in 1998 and has held leadership positions in several functions across the company. Prior to joining Washington Gas, Ms. Gutermuth gained broad leadership experience in a number of industries, including health care and energy. Ms. Gutermuth received a BBA from William & Mary and an MBA from the University of Maryland. She also completed the Organization Development certificate program at Georgetown University. Ms. Gutermuth currently serves on the Northern Virginia Chamber of Commerce Board and Executive Committee, the Southern Gas Association Executive Council, the Washington Performing Arts Board and Governance Committee, and is a founding member of the Community Foundation for Northern Virginia's Business Women's Giving Circle.

ALISON HERRING '00

PANELIST & COACH
INDEPENDENT HISTORIAN

Alison Herring, CPA, is a current board member and former Chairman of the Mason Accounting Programs Board. She graduated from the inaugural Masters of Accounting program at William & Mary in 2000 and then had a 16 year career at KPMG out of the Richmond and Dallas offices. She worked in the audit practice in a variety of industries including healthcare, consumer markets, manufacturing, retail, and distribution. She was involved in several public offerings and has extensive experience with SEC rules and regulations. Ms. Herring also served on an elite team responsible for the deployment of KPMG's innovative electronic audit software to the U.S. firm, which represented the biggest change in the history of the audit practice. On that team, she led the support services available to audit professionals across the U.S. She capped her career at KPMG as the Director of the KPMG Master of Accounting and Data Analytics Program, which was launched at The Ohio State University and Villanova and later extended to ten additional universities. Ms. Herring is currently an independent historian and author working towards the research and publication of The Powell Family Papers held at the Special Collections Research Center of Swem Library at William & Mary.

ANN MARIE HIGGINS '06, MAcc '07

SPONSOR, PANELIST & COACH
SENIOR MANAGER, EY

Ann Marie Higgins is a Senior Manager in the Financial Accounting Advisory Services practice of Ernst & Young LLP. She has over ten years of industry experience providing services to a variety of financial services clients including multi-banks, broker-dealer organizations, and exchanges. Ms. Higgins began her career in New York City and currently works in the Atlanta office. In her various roles at EY, she has coordinated some of the company's largest and most complex global financial services audits including UBS, Intercontinental Exchange, Inc. (ICE) and the New York Stock Exchange (NYSE) where she helped complete an $11 billion acquisition – a highlight of her career. Ms. Higgins has extensive knowledge in business combinations, consolidation, debt refinancing, derivatives, hedging, and IPO preparation. Away from work, Ms. Higgins is happily married to a fellow William & Mary alumnus (class of '05). She is a passionate world traveler, avid book reader, and enjoys spending time with family and friends.

ANN HOLCOMB

SPONSOR & PANELIST
VICE PRESIDENT, T. ROWE PRICE

Ann Holcomb is a vice president of T. Rowe Price Group, Inc., Head of the Associate Analyst Program, and a portfolio manager in the U.S. Equity Division of T. Rowe Price. Ms. Holcomb is co-chair of the Investment Advisory Committee of the U.S. Structured Research Fund. She is also the portfolio manager of the European Structured Research Fund. Ms. Holcomb joined the firm in 1996. Prior to her current position, she was an investment data analyst and database programmer in the Quantitative Equity Group. Ms. Holcomb earned a BA in Mathematics from Goucher College and an MS in Finance from Loyola University Maryland. She also has earned the Chartered Financial Analyst designation. Ms. Holcomb serves on the Board of Trustees of Calvert School and the Walters Art Museum.

KAREN JACKSON MBA '91

PANELIST & COACH
PRESIDENT, APOGEE STRATEGIC PARTNERS

Karen Jackson is the president of Apogee Strategic Partners, a Virginia consultancy helping companies and organizations address their most daunting challenges in cyber security, autonomous systems, and smart communities. Additionally, she serves as a Senior Fellow with the Center for Digital Government. Ms. Jackson formerly served as the Secretary of Technology for the Commonwealth and Commonwealth Deputy Secretary of Technology. In her official capacities she served as a senior advisor to Governors Kaine, McDonnell, and McAuliffe on technology matters. As Secretary, she was responsible for overseeing and advancing the Commonwealth's IT infrastructure, developing and advancing policy, programs, and legislative to facilitate innovation, entrepreneurship, technology development, and adoption. Ms. Jackson serves on a number of Boards including the Advisory Board of the Apex Systems Center for Innovation and Entrepreneurship at Virginia Tech, the Advisory Board of Sera Brynn (cyber audit and assessment firm located in Suffolk, VA), and the Board of Directors for Sweet Briar College. She holds a Bachelor's of Science in Business Management from Christopher Newport University and a MBA from William & Mary.

BARBARA JOYNES '82

PANELIST & COACH
CO-FOUNDER AND DIRECTOR OF MARKETING, VALLEY ROAD VINEYARDS

Barbara Joynes has enjoyed a 35+ year career as an advertising industry executive, in leadership positions with agencies in Richmond and NYC. Most recently, she was Senior Vice President and Director of Account Management at Richmond-based West Cary Group. Prior to West Cary Group, she was with The Martin Agency in a variety of roles, culminating as Executive Vice President and the firm's first female Partner. Clients that have benefited from her strategic expertise include Mercedes-Benz, Morgan Stanley, UPS, American Express, and GEICO, to name a few. In 2015, Ms. Joynes and her husband took a leap of faith when they purchased 15 acres of land in Albemarle County, Virginia and started Valley Road Vineyards in Afton, Virginia, along with four other founding couples. The winery opened in 2016 and immediately garnered recognition for its award-winning wines. In 2017, Ms. Joynes joined the venture full-time as the winery's Director of Marketing. In addition to her career achievements, Ms. Joynes has spent a great deal of time giving back to the community. Past civic involvement includes Board roles with the William & Mary Alumni Association, Henrico Doctors' Hospital, and YWCA of Richmond, among others. Ms. Joynes earned her BBA in Management from William & Mary in 1982.

PAULA KAR

PANELIST & COACH
BOARD MEMBER, WOMEN IN ETFS

Paula Kar is a senior investment management executive and Board Member of Women in ETFs, a global non-profit organization with nearly 5,000 members worldwide, focused on the career development of women in investment management. Ms. Kar has served as Head of Product Management for the exchange-traded funds business at ProShares and at BlackRock, the global leader in investment management. Previously, she was a senior consultant with McKinsey & Company, advising top banking and investment management clients globally, and started her career in fixed income sales and trading with Citigroup. Ms. Kar holds an MBA degree in Finance, graduating with Honors, from the Wharton School of the University of Pennsylvania.

MEG KELLY '10

PANELIST & COACH

RECRUITER, LANDING POINT SEARCH GROUP

Meg Kelly is a Recruiter for Landing Point Search Group focusing on Accounting/Finance Professionals in the Alternative space. Prior to this, Ms. Kelly was a Vice President at MFA Financial, a public mortgage REIT, covering non-performing and re-performing whole loans, and a financial controller at Goldman Sachs, performing product control over the Merchant Banking Division and Distressed Credit Products, as well as Direct Hedge Fund accounting in their Investment Management Division. Ms. Kelly holds an MBA from NYU and her BBA in Accounting from William & Mary, 2010.

TINA KENNY '92

PANELIST & COACH

ATTORNEY - RETIRED

Tina Kenny spent her professional life practicing law in New York and Virginia specializing in corporate and telecommunications law. She is currently based in Northern Virginia where she shares her expertise with non-profit entities. Mrs. Kenny has served on numerous non-profit boards as a Director and Officer. Recently she was President of the Cherry Blossom Chapter of National Charity League, Inc. and served on its Board for three years. In addition, she was a founding member and creator of a local non-profit corporation whose mission is to provide financial support to Northern Virginia women affected by any cancer, increase awareness, and support medical research. Mrs. Kenny is currently a member of the William & Mary Alumni Association Board of Directors. She earned her BA from William & Mary in 1992 with a Government major and Economics minor. Mrs. Kenny received a JD from St. John's University School of Law in 1995.

VERONIKA LISKOVA

PANELIST & COACH

BUSINESS RELATIONSHIP MANAGER, BBVA COMPASS BANK

Veronika Liskova is a Business Relationship Manager at BBVA Compass Bank with eight years of experience in business banking based in San Antonio, TX. Ms. Liskova provides a range of financial solutions including credit, deposit, and cash management products to help clients with annual revenues over $1M to better manage their businesses and cash flow. With nine years of previous experience as a successful business owner, Ms. Liskova knows firsthand the challenges business owners face and is uniquely positioned to identify issues and proactively solve them. Prior to joining BBVA Compass Bank, Ms. Liskova was a Business Relationship Manager for the Business Banking Group at JPMorgan Chase Bank. She also taught Principles of Macroeconomics at the University of the Incarnate Word in San Antonio. In the community, she served on the Board of Directors of Musical Bridges Around the World helping to bring international classical music to San Antonio. Ms. Liskova earned her Master's degree from the University of Economics in Prague, Czech Republic, with a Corporate Management major and European Economic Integration minor.

PAM LOPEZ '83

PANELIST & COACH
MANAGING PARTNER AND CO-FOUNDER, CUSTOMER FOCUSED STRATEGIES

Pam Lopez is one of the co-founders and Managing Partners of Customer Focused Strategies (CFS). CFS is an Atlanta-based, women-owned management consulting firm helping businesses reach their goals by following a customer-centric mindset. Founded twenty years ago, CFS provides strategy, product development, management, and marketing direction to a number of long-time clients in diverse industries including Telecom, Technology, Utilities, Media, Healthcare, and Transportation. Ms. Lopez co-leads a team of collaborative industry veterans who bring "the voice of the customers" to every project, delivering successful results to their clients. Prior to starting in consulting in 1997, Ms. Lopez held various executive positions in sales, marketing, and customer service. She served as a Regional Sales Manager for indirect partner sales and held the positions of VP Marketing and VP Customer Service for two cellular companies that are now part of Verizon.

LAUREN MALAFRONTE

SPONSOR, PANELIST & COACH
MANAGING DIRECTOR, SCOTIABANK

Lauren Malafronte is a Managing Director, responsible for Client Management for Prime Services. She also is a member of Scotiabank's US Diversity & Inclusion Committee. Prior to joining Scotiabank in 2013, Ms. Malafronte was the Head of Client Service for Prime Services at Barclays Capital. She began her career as a Computer Programmer/Business Analysts for various financial institutions before she moved into the Equity Finance business while at Lehman Brothers. Ms. Malafronte is currently the Chair of the Board of Directors of 100 Women in Finance, a global association of over 15,000 professionals in the financial industry. Ms. Malafronte received a BBA in Computer Information Systems and an MBA in Finance from Baruch College (CUNY). She lives in Brooklyn, NY with her husband and two daughters.

MELISSA MASTRODOMENICO

PANELIST & COACH
PARTNER, MASTRODOMENICO & BUXIE, CPAS

Specializing in international tax issues, Melissa Mastrodomenico, CPA combines her knowledge of U.S. and Mexico's fiscal policies to create domestic tax and estate planning strategies tailored to her clients' cross-border needs. Ms. Mastrodomenico focuses on interim planning to help monitor, improve, and execute said strategies while cultivating lasting relationship with her clients. Being a San Antonio native with Mexican American origins, she prides herself in being bilingual and bicultural. She understands that learning how to navigate and create fiscal strategies, especially in a foreign country, can be complicated and intimidating. She strives to educate her clients, so they can understand and make decisions best suited for their business. Ms. Mastrodomenico earned her BBA from The University of Texas at San Antonio and her MBA from The University of Phoenix. Passionate about giving back, she is Co-chair of Entrepreneurial Connections, NAWBO's non-profit and mentorship program for teen girls. In charge of fundraising, she helps raise money for college scholarships awarded each school year. In her spare time, Ms. Mastrodomenico enjoys barre workouts and spending quality time with her three children.

LISA MAUS '07

SPONSOR, PANELIST & COACH

FINANCIAL SERVICES ADVISORY PARTNER/PRINCIPAL, EY

Prior to her current role, Lisa Maus was a Senior Manager in the Treasury and Liquidity Risk Advisory group of Ernst & Young's Financial Services Office in New York. In this role, Ms. Maus advised financial services clients in various capacities including liquidity risk modeling and analytics, cash and collateral management, and evolving regulations. She worked primarily with large investment banks, specializing in their secured funding and prime brokerage businesses. Recently, Ms. Maus led a global initiative to develop enhanced entity and intercompany liquidity risk management including developing risk limits and business forecasting. Prior to joining EY, Ms. Maus spent over six years at JPMorgan Chase in liquidity risk management roles in both Corporate Treasury and in the Investment Bank. Ms. Maus graduated from William & Mary in 2007 with a BBA in Finance.

KELLY MCGRATH

PANELIST & COACH

DIRECTOR OF OPERATIONS, ATOMIC CAPITAL

Kelly McGrath is the Director of Operations at Atomic Capital, a blockchain-enabled technology and financial group based in New York City. Atomic provides the technology platform for the issuance of digital securities that adheres to all SEC regulations, while also providing fundraising capabilities and ongoing administration of securities issued. Ms. McGrath is the relationship manager for Atomic's key clients and strategic partners. Additionally, she is responsible for devising and implementing procedures to ensure the business can scale in a seamless manner. Prior to joining Atomic, Ms. McGrath worked at Bernstein Global Wealth Management where she advised high net worth individuals on investment decisions and long-term wealth planning strategies. She ultimately created a new role for herself at Bernstein, managing operations for eight financial advisors with an aggregate assets under management (AUM) of over $5B. She was selected by a committee of Senior Managers and Managing Directors to join the Leadership Development Program, an 18-month training program designed to develop a sophisticated business mindset and sharpen the skills of the 10 participants required for strategy, project, and management roles. Previously, Ms. McGrath worked at ICE Canyon LLC (a subsidiary of Canyon Partners LLC), a hedge fund specializing in Emerging Markets and Global Credit strategies. She started her career at Scottwood Capital Management, an event-driven hedge fund in Greenwich, CT. Ms. McGrath holds her Series 7 & 63 licenses as well as a BA in Art History, cum laude, from Kenyon College in Ohio.

SHELLY MICHALOWSKI '01

PANELIST & COACH

MANAGING DIRECTOR, PWC

Michelle Michalowski is a tax managing director in PwC's National Tax Services Exempt Organizations Tax Services group with over 17 years of experience providing specialized tax consulting and compliance services related to charitable giving. She serves clients throughout the US as PwC's subject matter specialist for private foundations and other complex charitable tax matters. Her clients are some of the largest foundations in the country and she also advises family offices and corporations on fulfilling their philanthropic visions. She is a frequent instructor and presenter on issues affecting exempt organizations. She graduated with a BBA in Accounting and a secondary concentration in Economics from William & Mary and obtained her MS in Taxation from American University.

MOLLY NISSMAN

SPONSOR, PANELIST & COACH

FINANCIAL ADVISOR AND PORTFOLIO MANAGER, UBS FINANCIAL SERVICES

Molly Nissman is a Vice President of Wealth Management at UBS Financial Services Inc. in Norfolk, Virginia. As a Financial Advisor and Portfolio Manager, Ms. Nissman helps families and businesses create and implement personalized financial solutions. Her areas of expertise include investment management, wealth accumulation, wealth transfer, and business succession planning. A cum laude graduate of Sweet Briar College, with a major in Government, she is currently pursuing her MBA in the Flex MBA Program at William & Mary.

LEILA MATHUR PECK P'17

SPONSOR, PANELIST & COACH

VICE PRESIDENT AND FINANCIAL ADVISOR, MORGAN STANLEY

Leila Mathur Peck has been a Financial Advisor with Morgan Stanley for over 25 years. She received her BS from the University of Maryland College of Journalism, with a specialty in Science and Technical Communication. The training she received provided a foundation for research, analysis, synthesizing, and applying technical concepts to client's investment portfolios. She is responsible and accountable for managing over $105,496 million of client's assets as of March, 2019. Throughout her career, she has provided personal attention and caring to the families with whom she works. More recently, Leila has been working with the children and grandchildren of her clients, guiding them through their own financial planning and designing their financial path toward the future. Leila is active in the community groups such as Leaders in Energy and Women in Technology. She conducts educational, financial workshops for groups and is a voracious reader, having been in the same book club for over 15 years. She also enjoys exercising, attending art openings, gardening, sailing clubs and more. She lives in Northern Virginia with her 2 college-aged children and has a daughter who has graduated and is successfully launched. Leila is also a 4th generation working woman.

MOLLY PIERONI '90

PANELIST & COACH

MANAGING PARTNER, MC2 INSTITUTE

Molly McFarland Pieroni serves as Managing Director of JatoTech Ventures, an early stage venture capital firm she co-founded in 1999. She recently founded MC2 Institute, an investment and advisory firm based in Dallas, Texas. Prior to MC2, Ms. Pieroni worked as a Managing Director for Highside Capital, a long-short equity hedge fund, leading the firm's business development and strategy efforts. She began her career as one of the inaugural members of the Texas office of the Boston Consulting Group, focusing on strategy engagements for clients in technology, consumer, and financial services industries. She returned to BCG in 2007 to help manage the global Telecommunications, Media, and Technology practice area. Ms. Pieroni worked as an investment banking analyst in New York at Dean, Witter Reynolds in the Acquisition and Private Finance group before business school. She earned an MBA from Harvard Business School and a BBA from William & Mary.

AMY STEINDLER '80

PANELIST & COACH

FOUNDER, EQ INSIGHT COACHING

During her successful 30 year sales career for industry leaders such as Alliance Bernstein, AOL/Time Warner, Tech Data, and Diebold, Amy Steindler saw a distressing pattern: highly intelligent managers who were failing to inspire their teams or hitting a wall when it came to career advancement. When she recognized the need for emotional intelligence coaching and training for emerging and established leaders, she quit her corporate job to become a life coach with certification in emotional intelligence. She is the founder of InsightOut Life Coaching, a private client coaching practice, and EQ Insight Coaching, a corporate coaching and training practice. She's the professional go-to coach for highly intelligent, skeptical executives who find themselves stuck at a crossroads, and sensible, progressive women experiencing uncharted territory and seasons of life growth. Her tools and techniques, gathered from best-in-class practitioners and personalized to serve each individual, have unleashed countless epiphanies and created forward movement for her clients, both personally and professionally. Her current projects include launching a coaching app for daily emotional intelligence practice and a rebranding launch for her practice scheduled in April.

TERRY THOMPSON '67

PANELIST

RETIRED PRINCIPAL, HEWITT

Terry Thompson completed her consulting career as a principal at Hewitt (now AonHewitt), where she specialized in compensation and benefits strategy and design and managed multi-practice client accounts. She opened Hewitt's consulting office in Washington, DC, in the early '90s. Since retiring, she has devoted herself to education and the arts, serving on a number of not-for-profit boards in the Washington metro area and at William & Mary. Currently, she is a member of the Raymond A. Mason School of Business Foundation Board. She has an undergraduate degree from William & Mary and an MA from the University of Tennessee.

THERESA TORIAN MBA '89

PANELIST & COACH

CHIEF FINANCIAL OFFICER AND CHIEF OPERATING OFFICER, CFRA

Theresa Torian is the Chief Financial Officer and Chief Operating Officer at CFRA where she is responsible for leading the company's global financial and operational affairs. Ms. Torian brings more than 20 years of experience helping organizations to structure their financial, operational and organizational designs to scale for rapid growth, facilitate the integration of company acquisitions of all sizes, and move into global markets. Prior to joining CFRA in 2016, Ms. Torian served as Senior Director of Finance and Corporate Controller for SNL Financial (now part of S&P Global) where she worked for approximately ten years helping the business to expand its operations globally. Prior to SNL Financial, she was Director of Business Management with LexisNexis and a Consulting Manager with Grant Thornton LLP. Ms. Torian graduated from the University of Virginia with a BA in Mathematics and holds an MBA from the Raymond A. Mason School of Business at William & Mary. An active and connected member of the Charlottesville, Virginia community, she has served on boards of several local music organizations and has a passion for giving back to the community, volunteering with social and environmental nonprofit organizations.

COACHING SESSION

Elevator Pitch Activity

An elevator pitch is a brief, persuasive speech that you use to spark interest in who you are and what you are passionate about. A good elevator pitch should last no longer than a short elevator ride of 20-30 seconds, hence the name. The goal of this exercise is to help students develop and improve their elevator pitch.

MARISKA MORSE

ENDORSEMENT PARTNER & FACILITATOR

VICE PRESIDENT OF MARKETING & OPERATIONS, FORTE FOUNDATION

Mariska Morse has 24 years of experience in marketing, management, programming, and business development with for-profit and non-profit organizations. Since 2001, Ms. Morse has played key roles in the start-up and growth of Forte, a nonprofit that supports the advancement of women in business with over 100K members and 130 sponsor schools and companies. Ms. Morse continues to lead Forte's marketing efforts growing the organization's brand, membership, and CRM activities. In addition to marketing, Ms. Morse also served as Forte's first Corporate Relations Director, developing programs that would help recruit and retain top female talent. Prior to Forte, Ms. Morse led the Women in Business Initiative at Michigan's Ross School of Business and also worked for 5 years in marketing. Additionally, Ms. Morse was a consultant to a variety of organizations including Zehno Cross Media Communications, the Graduate Management Admissions Council, and the Freeman School of Business at Tulane University. Ms. Morse earned her BA from Boston College.

Networking Activity

Learning how to network is an important skill for nearly every professional. Professionals will assist students while they practice entering and exiting conversations, creating appropriate discourse, including others in their dialogue, and forging effective professional connections. The goal of this activity is to build comfort and confidence in networking settings while learning new skills that may be applied to both personal and professional life.

AMANDA BARTH MEd '06

FACILITATOR

DIRECTOR OF MBA ADMISSIONS, WILLIAM & MARY

Amanda Barth earned a BA in English and Spanish in 2002 from Wittenberg University in Springfield, Ohio. She spent two years working in undergraduate admissions at Wittenberg, before pursuing her MEd degree in the Educational Policy, Planning and Leadership Program at William & Mary from 2004-2006. After completing her Masters, she worked as a development officer at the Arizona State University Foundation in Tempe, Arizona. Ms. Barth returned to William & Mary in 2009, joining the Raymond A. Mason School of Business, and has been an active part of the Mason family ever since. She enjoys spending time with her husband, Brent, her son, Jack, and their Labrador retriever, Hachiko.

COACHES

HILARY ALBRIGHT

SPONSOR & COACH

TALENT ACQUISITION CONSULTANT, CAPITAL GROUP

Hilary Albright is a talent acquisition consultant at Capital Group, where she focuses on global investment group recruiting. She has 4 years of industry experience, all with Capital Group. Earlier in her career at Capital, Ms. Albright worked as a global investment control analyst. She holds a Bachelor's degree in International Relations from the University of Southern California. Ms. Albright is based in Los Angeles.

WALTER BRICKMAN '99, MAcc '00

SPONSOR & COACH

EXECUTIVE DIRECTOR, EY

Walter Brickman, CPA, is a tax consulting executive with 18+ years of experience across many industries. Mr. Brickman is based in Tysons, VA and focuses on providing tax consulting services for the research credit, orphan drug credit, and accounting methods, along with knowledge of new provisions such as FDII, 199A, and the new meals & entertainment laws. Mr. Brickman has served clients in industries including pharmaceutical, software, defense, and consumer products. Before joining EY, Mr. Brickman began his career at Arthur Andersen. Mr. Brickman earned his BBA from William & Mary in 1999 with major in Accounting and a minor in Computer Science. He also earned his Master's in Accounting from William & Mary in 2000.

REBECCA DAHL

ENDORSEMENT PARTNER & COACH

CREATIVE DIRECTOR, FORTE FOUNDATION

Rebecca Dahl is the Creative Director at Forte, a non-profit advancing women in business. She has over a decade of marketing, communications, and operations experience within not-for-profit and education. Prior to joining Forte, Ms. Dahl spent over 7 years at Columbia Business School, specializing in marketing the school's MBA programs. Ms. Dahl graduated with a degree in Journalism and Communication from St. Bonaventure University. She is proud to call herself a DIY maven and has an unquenchable passion for dreaming big, building new things, and bringing new life to old treasures.

JENNIFER MASTRAPASQUA

SPONSOR & COACH
SENIOR MANAGER OF MARKETING, CAPTRUST

Jennifer Mastrapasqua joined CAPTRUST in 2010 and now serves as senior marketing manager responsible for the efficient marshaling of resources in the day-to-day management of marketing projects. Prior to joining the firm, she worked as director of marketing with Fidelity Bank. Ms. Mastrapasqua graduated with a Bachelor of Business Administration degree in marketing from Radford University.

ANNIE MEDINA '06, MBA'16

COACH
PROJECT & COMMUNICATION SPECIALIST, MINDSTRONG

Annie Medina, MBA, ACNP-BC, is a Project & Communication Specialist at Mindstrong, a health-tech start-up based in Palo Alto which recently completed a round of Series B funding. She focuses on internal and external communications for partner strategy and launches, and enjoys the start-up atmosphere. Prior to joining Mindstrong, Ms. Medina was a VP of Consulting Services and Account Executive with OPEN MINDS, a boutique healthcare consulting firm, and a Chief Operating Officer at a UHS facility. She has a BSN and MSN from Virginia Commonwealth University, a BS from William & Mary, and completed an MBA at the Mason School of Business in 2016.

CAROLYN OFFUTT '07

SPONSOR & COACH
SENIOR MANAGER, EY

Carolyn Offutt is a Senior Manager in EY's Transaction Advisory Services (TAS) practice, focused on financial due diligence for mergers and acquisitions. She has performed due diligence for corporate and private equity clients and focuses primarily in the media and technology, aerospace and defense, transportation, and industrial sectors. She has been with EY since 2007, including eight years in EY's audit practice. Ms. Offutt graduated summa cum laude with a BBA in Accounting and Mathematics from William & Mary.

ERIN OLDFORD

COACH

ASSISTANT PROFESSOR, MEMORIAL UNIVERSITY

Dr. Erin Oldford earned her PhD in Finance from Carleton University in 2017. Her research interests include firm, intra-industry, and economic effects of mergers and acquisitions, cross-borders transactions, and corporate restructurings. Dr. Oldford also researches the intersection of corporate governance practices and firm performance. Her research has been published in top journals, including Journal of Business Finance and Accounting, Pacific Basin Journal, The Financial Review, and Managerial Finance. Dr. Oldford teaches a variety of courses, including introductory and advanced corporate and investment finance. In 2018, she launched Memorial University's student managed investment fund ("The Fund"), which runs $150,000 of donated funds. She now serves as Faculty Advisor of The Fund. Dr. Oldford also coaches case competitions and stock pitch competitions, and in the past, her teams have been successful at international competitions such as ICBC and Van Berkom.

BRITTANY PECK '16

COACH

BUSINESS APPLICATIONS PROJECT MANAGER, MICROSOFT

Brittany Peck is a Business Applications Project Manager at Microsoft in Seattle, WA. She is responsible for project delivery and execution of CRM applications to Microsoft Azure and Dynamics 365 to support organizations' digital transformations. She has worked with both commercial enterprise and government clients. Prior to joining Microsoft, Ms. Peck earned her BBA from William & Mary in December 2016 with a Finance major and Public Health minor. After graduating, she was a post-baccalaureate fellow for the Boehly Center and helped plan and implement the 2nd annual Women's Stock Pitch & Leadership Summit.

WILL PLATT '01

SPONSOR & COACH

PARTNER, MOMENTUM ADVISORS

Will Platt is a Partner at Momentum Advisors, a registered investment advisor based in New York City. He joined Momentum in 2014 from PT Wealth Management, an independent wealth management firm he founded in 2010. Mr. Platt began his career as a financial advisor in 2002. Prior to starting his firm, he spent 8 years at Mass Mutual, where he focused on financial planning, insurance and investments. He is a Certified Financial Planner and Certified Fund Specialist. An active member in his community, Mr. Platt serves on the board of the Open Door, an organization that helps assimilate immigrants by teaching English, job skills and assisting with housing. Additionally, he takes pride in coaching his son's football teams. Mr. Platt holds a BA in Sociology from William & Mary, where he played cornerback for the football team.

MATT SASS '10

COACH

ANALYST, SURVEYOR CAPITAL

Matt Sass, CFA, is an Analyst at Surveyor Capital, a leading long/short equity hedge fund based in New York City. Mr. Sass focuses on investments in the biotechnology and pharmaceutical sectors. Prior to joining Surveyor, Mr. Sass worked in private equity and investment banking. Mr. Sass earned his BS from William & Mary in 2010 with a double major in Finance and Neuroscience.

ROBBYN SCRIBNER

COACH

ASSISTANT DIRECTOR, UTAH WOMEN & LEADERSHIP PROJECT

Robbyn Scribner is Assistant Director at the Utah Women & Leadership Project at Utah Valley University. Ms. Scribner serves as the lead researcher for the Utah Women Stats Research Snapshots series, where she co-authored fourteen snapshots on various topics of interest surrounding Utah women, including poverty, labor force participation, domestic violence, unpaid care work, and the gender wage gap. Her most recent research study focused on male allies in the workplace, identifying strategies men can use to advance and empower women at work. Ms. Scribner also oversees community relations and fundraising for the Project. She is a regular speaker and presenter on women's issues, focusing on improving women's educational outcomes as well as career success. Ms. Scribner holds a Master's degree in English with an emphasis in composition and rhetoric from Brigham Young University, and a Bachelor's degree from BYU in European Studies. She has a special interest in researching and writing on issues affecting women and careers, including the creation of alternative pathways for women to create successful careers while prioritizing other areas of their lives, as well as reentry challenges for women who have taken career breaks.

RENE THERIAULT

COACH

MANAGING DIRECTOR, KKR

Rene Theriault is a Managing Director at KKR within its Real Estate Credit team. Mr. Theriault heads up the securities side of the business, focusing on junior credit positions of conduit and standalone Commercial Mortgage Backed Securities (CMBS). Prior to joining KKR, Mr. Theriault was a Managing Director and Head of Large Loans at Goldman Sachs within its Real Estate Financing Group. He began his career as an Associate at Sullivan & Cromwell LLP, where he focused on Corporate and Real Estate transactions. Mr. Theriault has a BA from the University of Virginia and a JD from Harvard Law School.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