

FINANCE 101



ALEX KOCHER '12
DIRECTOR, CLIENT STRATEGY
GLOBAL ENDOWMENT MANAGEMENT

Alex Kocher is a Director on the Client Strategy Team at Global Endowment Management (GEM), a leading outsourced Chief Investment Office (OCIO) stewarding the assets of endowments, foundations, and other long-term investors. In his role, Alex leads all aspects of client engagements, supporting investment policy development, portfolio implementation and oversight, and partnering with client committees and staff. Previously, he held roles on the Public Investments team covering public equity and hedge fund investments. Prior to joining GEM in 2014, Alex was an Investment Banking Analyst in Jefferies' Consumer and Retail group. Alex graduated from The College of William & Mary with a B.B.A in Finance and a double major in International Relations. He is a CFA Charterholder.



GREG PIERONI
MANAGING DIRECTOR
UBS

Greg joined UBS Private Wealth Management in 2009 and has more than 25 years of private wealth management experience. Previously, he worked for 15 years at Goldman Sachs after spending five years with Conoco as an oil trader implementing risk management strategies. Greg and his team oversee and manage approximately \$4.5 billion in assets for ultra-high net worth individuals and families. Greg is also the lead portfolio manager for the team's proprietary \$500 million Master Limited Partnership portfolio strategy. He received his B.S. from Louisiana State University and his M.B.A. from Harvard Business School.

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ABBEY REECE '16 MANAGER, PROJECT DEV. GREATHOUSE REMODELING

Abbey Reece '16 is a former consultant turned entrepreneur with a passion for small businesses. After graduating from William & Mary with a Finance major and Psychology minor, Abbey began her career as a consultant with Bain & Company in the Atlanta office. The strategic experience and mentorship proved invaluable, but Abbey was eager to gain exposure to entrepreneurship, an area of interest for her. She pursued an MBA with a focus in entrepreneurship from Kellogg School of Management, during which time she interned with numerous startups across all stages of funding. After graduating, in the midst of COVID and still not sure exactly where she fit into the entrepreneur world, Abbey joined her family construction business where she found a unique blend of passions as a leader of a small remodeling company with immense potential for growth. After getting married and taking a year off work to go backpacking in New Zealand, Abbey is now a part of the leadership team at GreatHouse Remodeling in her home city of Atlanta, GA, and finds immense joy in not only helping the company and its employees grow and thrive, but also in her company's ability to transform peoples' lives through their homes. Abbey loves to stay busy and is always looking for opportunities to continue to help small businesses and their leaders achieve their growth potential. In her free time, you can usually find her in the US National Parks hiking with her husband (they're hoping to visit all of them someday!) and staying involved with her church and its ministry work.



PHILIP ROANE '06

Philip Roane has held roles in corporate development, corporate finance, private equity and investment banking. He received a BA from the College of William & Mary and an MBA from Harvard Business School.