

Asset, Wealth, and Portfolio Management



Lauren Finikiotis '21

Associate
J.P. Morgan

Lauren is a Senior Associate at J.P. Morgan Private Bank in Washington, D.C., where she provides comprehensive financial solutions and wealth management services to high-net-worth clients. In this role, Lauren advises entrepreneurs and executives on a range of wealth management issues, including asset allocation, pre-transaction planning, estate planning, balance sheet management, and charitable giving. Prior to this role, Lauren served as an Analyst at J.P. Morgan Private Bank, also in Washington, D.C. Lauren earned a B.S. in Finance with a minor in Mathematics from William & Mary, graduating Summa Cum Laude. During her time at William & Mary, Lauren was a captain of the cross country and track team.



Alex Kocher '12

Director
Global Endowment Management

Alex Kocher is a Director on the Client Portfolio Management team at GEM, a \$12 billion Outsourced CIO founded by the leadership of the Duke University endowment and serving primarily mission-driven nonprofits. In this role, Alex manages client relationships, develops investment policy, and partners with client committees and staff. He previously held roles on GEM's Manager Research team. Prior to joining GEM in 2014, Alex worked in Jefferies' Consumer and Retail investment banking group. Alex received a B.B.A. in Finance with a double major in International Relations from The College of William & Mary. He is a CFA Charterholder.



Tovia Rosner '19

**Assistant Vice President
Allianz Global Investors**

Tovia Rosner is a portfolio manager on the Thematic Equity Team at Allianz Global Investors based in London. In this role, she is responsible for helping to manage the Food Security Fund - a fund focused on supporting the achievement of SDG 2 (no Hunger) with investments in sustainable agriculture, supply chain and nutrition. Prior to joining AllianzGI, she worked as a portfolio analyst at Calvert Impact Capital where she helped manage the current portfolio and source deals primarily within the regenerative agriculture space as well as affordable housing. She earned a BBA in Finance from William & Mary, graduating magna cum laude.



David Seidl '23

**Analyst
J.P. Morgan Private Bank**

David Seidl is an Analyst at J.P. Morgan Private Bank, currently based in the Washington DC area. A recent graduate of the Raymond A. Mason School of Business at William & Mary, he earned his Bachelor of Business Administration (BBA) in Finance, graduating summa cum laude with a minor in Mathematics and a concentration in Accounting. During his time at William & Mary, David demonstrated strong leadership as the President of the Men's Lacrosse team, spearheading significant fundraising efforts. He has also gained experience through internships in private banking and corporate advising. David is certified with the FINRA Series 7 and Series 66 licenses, reflecting his commitment to a career in wealth management.