

Finance 101



Craig Armstrong '92

Senior Portfolio Manager

Insight Investment

Craig joined Insight's Fixed Income Group in January 2015 following BNY Mellon's acquisition of Cutwater Asset Management (Cutwater). Craig is a senior portfolio manager with a primary focus of managing multi-sector investment portfolios and developing strategies for insurance clients. Previously Craig specialized in the modelling, analysis, and management of asset backed and mortgage-backed securities. He has also held positions in market risk where he was responsible for quantitative analysis, risk management and control functions and in the LDI business segment where he worked in the risk analytics and treasury functions. He began his financial services career at Cutwater in 1992. Craig holds a BBA degree from the College of William and Mary in Williamsburg, VA and an MBA from the Stern School of Business at New York University. As well as being a member of the New York Society of Security Analysts, Craig holds Series 7 and 63 licenses from the Financial Industry Regulatory Authority (FINRA) and is a CFA charterholder.



Jessica Burt '02

Managing Director
BlackRock

Jessica K Burt, Managing Director, is head of BlackRock's client platform tech enablement strategy within the global client businesses. Prior, Ms. Burt led the global platform and business strategy for BlackRock Investment Stewardship (BIS), overseeing daily operations and strategic initiatives for BIS. Ms. Burt also headed the Voting Platform known as 'Voting Choice', enabling institutional clients to vote their shares. Previously, Ms. Burt was the Global COO and lead business strategist of Fixed Income and Sustainable ETFs within the ETF and Index Investments business. During her tenure she led strategic initiatives to grow the adjacent marketplace to Fixed Income ETFs. Just prior to her time in the ETF and Index Investment business, Ms. Burt was the Global COO of the Trading and Liquidity Strategies team as well as the Investment Platform unit. Her work spanned across trading, securities lending, cash and cross-platform strategic initiatives within the Investment Platform umbrella. Ms. Burt was a member of BlackRock's Platform and Innovation team (now BTO) responsible for the Americas Corporate and Risk practice area. She specifically focused on re-shaping, leading, and implementing regulatory change across the firm (i.e. Money Market Fund Reform, the Volcker legislation, and Central Clearing of derivatives under Title VII of the Dodd Frank Act). Prior to joining BlackRock in 2005, Ms. Burt was part of the Analytics department at Bloomberg, LP where she focused on CDS and MBS product builds and client training. Ms. Burt earned a BBA in Finance from The College of William and Mary with a minor in Government.



John Curtiss '93

National Product Development Leader Progressive Insurance

John is the National Product Development Leader in Personal Lines at Progressive Insurance. In this role, he is responsible for leading the product design, pricing, telematics and catastrophe modeling teams for our private passenger auto and property products. He also manages Progressive's Recreational Lines division. Prior to Progressive, he worked as Risk Analyst for JPMorgan, an investment banking analyst for Salomon Brothers in NYC and Hong Kong and a Business Manager for Capital One. John has an undergraduate degree in Finance and an MBA from Harvard Business School. John resides in Chagrin Falls, OH and is married with three children. Outside of work, he enjoys adventure travel, golfing, scuba diving and cooking.



Mark Decker '97

Founding Partner Proterra Real Estate Partners

With over 25 years of real estate and capital markets experience, Mark joined Proterra Real Estate Partners, a newly formed partnership to invest in real estate opportunities in 2023. Prior to joining Proterra, Mark served as CEO of Centerspace (NYSE:CSR), a publicly traded apartment owner operator with over 13,000 homes in the Mid-West and Mountain West. During Mark's tenure, he led a significant repositioning of the company from diversified real estate company to a focused owner operator of apartments this work included reconstituting the executive team, board of directors, balance sheet and portfolio, as well as a renaming of the Company and revamp of the culture. Before Centerspace, Mark was an investment banker serving the needs of real estate owner-operators, real estate services companies, lodging, and private equity. In his last role, Mr. Decker was Group Head for US Real Estate Investment Banking for BMO Capital Markets. During Mr. Decker's banking career he built several successful practices and worked on over 300 capital markets and advisory transactions valued at more than \$93 billion. Mark is a Trustee of Alpine Income Property Trust (NYSE: PINE) as well as Advanced Volumetrics Alliance, a private modular manufacturer, and a member of the Urban Land Institute.



Julia Frost '17

Head of Finance
Said Differently

Julia Frost is currently the Head of Finance at a marketing services and digital implementation firm, Said Differently, where she leads M&A, accounting, finance, tax, legal, and reporting activities. Prior, Julia was a senior associate at Falfurrias Capital Partners. At Falfurrias, she specialized in the execution of middle-market equity and leveraged buyout transactions across the end markets of marketing, media, industrials, and business services. Julia is returning to Falfurrias at the end of the month as a Vice President. Before Falfurrias, she was an equity research associate at Capital Group, an asset manager, where she specialized in US small-cap industrials, Canadian banks, and European aerospace and defense. She graduated Summa Cum Laude from the College of William and Mary with a degree in finance and played Division I lacrosse for the Tribe.



Matthew Fiordaliso '04

Partner
Ai SPARK

At his current role, he leads the product development and is responsible for creating metrics that power various fixed income institutions. Before joining Ai-Spark, he worked for 12 years at S&P Global running their fixed income pricing service. Mr. Fiordaliso graduated from the Mason School of Business with a Master's degree in Accounting and an undergraduate degree in Finance, both from the College of William and Mary.



Nic Greer '16

Vice President
Ares Management

Mr. Greer is a Vice President in the Ares Credit Group, where he focuses on opportunistic credit investing. Prior to joining Ares in 2018, Mr. Greer was a Financial Analyst at Houlihan Lokey in the Financial Restructuring Group. Mr. Greer holds a B.B.A., magna cum laude, from the College of William & Mary in Finance.



Ann Marie Higgins '06

Partner

EY

Ann Marie Higgins (class of '06) is a Partner in the Financial Accounting Advisory Services practice of Ernst & Young LLP. She has over 17 years of industry experience providing services to a variety of financial services clients including multi-banks, broker-dealer organizations, and exchanges. She began her career in New York City, spent two years in Zurich, Switzerland as part of EY's global exchange program, 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 engagements including UBS, Intercontinental Exchange, Inc. (ICE) and the New York Stock Exchange (NYSE) where she helped complete an \$11 billion acquisition. She has extensive knowledge in business combinations, consolidation, debt refinancing, derivatives, hedging and IPO preparation. Away from work, Ann Marie is happily married to a fellow William and Mary alumni (class of '05) with two sweet little boys. She is a passionate world traveler, avid book reader, and enjoys spending time with family and friends.



Kevin Tunick '77

Vice President & Managing Director, Private Investments
UNC Management Company Inc

Kevin retired from UNC Management Company ("UNCMC") in January 2023. He spent 15 years at UNCMC as Vice President and Managing Director of Private Investments where he was responsible for managing the more than \$5.2 billion Private Investment portfolio. Prior to joining UNCMC, Kevin spent seventeen years at Harvard Management Company ("HMC") in Boston, MA, where he was Manager, Private Equity and co-managed a \$4.1 billion portfolio of alternative investment partnerships. Prior to HMC, he was also Chief Investment Analyst for The Rockefeller Foundation in New York City, where he managed an \$80 million short-term fixed income portfolio and a \$3 million equity portfolio. Before the Rockefeller Foundation, he was Manager of Partnership Fund Accounting at Commodities Corporation USA in Princeton, NJ, as well as the controller at American Handling Equipment, Inc. Kevin received a B.B.A. from the College of William and Mary in Williamsburg, VA and a M.B.A. from Pennsylvania State University in State College, PA.