



Council of New Jersey Grantmakers

Investment Forum for Foundations and Endowments

*A conference for CEOs,
executive directors, CFOs, trustees, and
finance and investment committee members*

Wednesday, November 7, 2018

**The Palace at Somerset Park
333 Davidson Avenue
Somerset, New Jersey**

8:30 a.m. to 4:30 p.m.

JPMorgan Chase & Co. extends a heartfelt congratulations to the Council of New Jersey Grantmakers for a successful 2018 Investment Forum.

This gathering remains one of the state's premier networking events and serves as a vital platform for sharing best practices. We are honored to participate.

Alma DeMetropolis
Managing Director
NJ Market President
alma.demetropolis@jpmorgan.com

Michael D. Pages
Vice President
Endowment and Foundation Team Lead
michael.d.pages@jpmorgan.com

JPMORGAN CHASE & CO.

Dear Investment Forum Attendee,

On behalf of the Council of New Jersey Grantmakers, welcome to our third biennial *Investment Forum for Foundations and Endowments* – New Jersey’s only conference focused on foundation and charity endowment investment stewardship.

We’re glad you’re here and feel confident you’ll come away with ideas and information that will make your organizations stronger and more effective.

We’re grateful for the support and enthusiastic participation of the 16 sponsors whose generosity makes this singular program possible.

To make it easier to choose the sessions that best meet your needs, we’ve designated our 12 interactive workshops as “beginner,” “intermediate,” and “advanced,” and, this year’s forum builds in plenty of time for networking that includes breakfast, a cocktail reception, and our sponsor marketplace.

We begin the formal program with a plenary featuring keynote speaker Kim Y. Lew, Vice President and Chief Investment Officer, Carnegie Corporation of New York. Over lunch, we offer a stimulating panel that will provide a long-term market outlook, moderated by Michael Griffin, Managing Director and Senior Investment Specialist, J.P. Morgan.

To get the most out of the assembled talent and expertise, we urge you to shed any inhibitions you might have and ask whatever questions you feel will enlighten you about the diverse topics being discussed.

Our hope is that, by attending the Council of New Jersey Grantmakers Investment Forum for Foundations and Endowments, you’ll gain knowledge and contacts that will assist you in achieving your investment objectives for the good of the people your grantmaking serves.

Sincerely,



Jon Shure

JON SHURE

Interim President/CEO



Jonathan Pearson

JONATHAN PEARSON

Chair, Board of Trustees



William Gibson

WILLIAM GIBSON

Chair, Finance &
Investment Affinity Group

Thank You

TO ALL OF OUR SPONSORS!

The Council of New Jersey Grantmakers greatly appreciates the financial support received from all of its sponsors:

Signature Investor

JPMORGAN CHASE & CO.

Partner



Host

GLENMEDE Founded on ideals. Built on ideas.



Strategist



Expert

BLACKROCK®



Advisor



WEALTH MANAGEMENT
INVESTMENT CONSULTING



PEAPACK-GLADSTONE BANK
Private Banking since 1921

PROGRAM AGENDA AND SPEAKERS

8:30 a.m. – 5:30 p.m.

SPONSOR MARKETPLACE – *East Foyer and Library*

Visit with our experts throughout the day for conversation and complimentary materials

8:30 a.m. – 9:15 a.m.

NETWORKING BREAKFAST & REGISTRATION – *East Foyer and Library*

Host Sponsor: Glenmede

Introductory Remarks:

Carla E. Panzitta, Business Development Director - Vice President

Glenmede

9:15 a.m. – 10:15 a.m.

OPENING PLENARY – *East Ballroom*

Partner Sponsor: UBS Financial Services Inc.

Introductory Remarks:

Judy Spalthoff, Executive Director, Head of Family and Philanthropy Advisory Americas

UBS Financial Services Inc.

RUN YOUR OWN RACE

Keynote Speaker:

Kim Y. Lew, Vice President and Chief Investment Officer,

Carnegie Corporation of New York

10:30 a.m. – 11:20 a.m.

CONCURRENT MORNING SESSIONS I – *2nd Floor Salons*

Choose ONE session:

THE BASICS OF ENDOWMENT INVESTING AND PORTFOLIO CONSTRUCTION (Beginner)

Know the choices you face and how to get help

- Michael Crook, UBS Financial Services Inc.
- Alex Gurvich, PFM Asset Management LLC
- J. Peter Simon, Massey Quick Simon

Facilitator: Steve Faber, PFM Asset Management LLC

CHOOSING THE RIGHT APPROACH FOR MANAGING THE CORPUS (Intermediate)

CIO, portfolio manager, consultant, or committee – what model is best for your organization?

- Mike Chase, Fiduciary Investment Advisors, LLC
- Chris Moore, Massey Quick Simon

Facilitator: Marsha Atkind, The Healthcare Foundation of New Jersey

ALTERNATIVE INVESTMENTS: ARE THEY RIGHT FOR YOUR ORGANIZATION'S PORTFOLIO? (Intermediate)

Keep up to date on the pros and cons of ever-changing options

- Matthew Hoehn, BlackRock
- Kenneth Klein, Seelaus Asset Management
- Andrea McAndrew, Fiduciary Investment Advisors, LLC
- Peter Mladina, Northern Trust

Facilitator: Christine Healey, The Healey Education Foundation, Inc.

FROM PASSIVE TO ACTIVE INVESTING: THE EVOLUTION OF ETFs (Intermediate/Advanced)

The more you know, the better the results

- Mark Hoffman, PNC Financial Services Group, Inc.
- Joseph Kwok, Peapack-Gladstone Bank
- Kei Sasaki, Wells Fargo Private Bank

Facilitator: Edward D. Zinbarg, New Jersey Symphony Orchestra

11:30 a.m. – 12:20 p.m.

CONCURRENT MORNING SESSIONS II – 2nd Floor Salons

Choose ONE session:

BEST PRACTICES FOR REBALANCING PORTFOLIO ASSET ALLOCATIONS (Beginner)

What was right yesterday might be wrong tomorrow – the importance of reviewing strategy to align with organizational objectives

- Chris Cordaro, RegentAtlantic
- Alex Gurvich, PFM Asset Management LLC
- Kei Sasaki, Wells Fargo Private Bank

Facilitator: Bill Conger, Morristown Medical Center

SETTING A SPENDING POLICY TO MEET YOUR ORGANIZATION'S OBJECTIVES (Geared To Nonprofits)

Where mission meets money -- the delicate art of balancing immediate spending needs and long-term endowment sustainability...and the law that governs these choices

- Chris Blume, Goldman Sachs
- Chris Petermann, PKF O'Connor Davies, LLP
- James Sonneborn, RegentAtlantic

Facilitator: Warren Tranquada, New Jersey Performing Arts Center

● SOCIALLY RESPONSIBLE INVESTMENTS & IMPACT INVESTING (Advanced)

Strategies that directly deliver against mission

- Caleb Croquart, PNC Financial Services Group, Inc.
- Deborah Kasemeyer, Northern Trust
- Manisha Kathuria, Neuberger Berman
- Anneliese Seelaus Mitnick, Seelaus Asset Management

Facilitator: Maryellen Frank, UBS Financial Services Inc.

● A FRAMEWORK FOR EVALUATING YOUR ENDOWMENT'S INVESTMENT RISK (Intermediate)

How to assess your portfolio's risk and avoid a dangerous guessing game

- Emily Berger, PKF O'Connor Davies, LLP
- John Church, Glenmede
- Peter Donchez, J.P. Morgan

Facilitator: William L. Gibson, The Leavens Foundation, Inc.

12:30 p.m. – 2:15 p.m.

LUNCHEON PLENARY – East Ballroom

Signature Sponsor: JPMorgan Chase & Co.

MARKET OUTLOOK: MANAGING YOUR PORTFOLIO TODAY FOR THE LONG-TERM

Moderated by Michael Griffin, Managing Director and Senior Investment Specialist, J.P. Morgan

Panelists:

- Chris Blume, Goldman Sachs
- John Church, Glenmede
- Michael Crook, UBS Financial Services Inc.
- Michael Vaknin, J.P. Morgan

Table Gift Compliments of Seelaus Asset Management

Remarks:

Anneliese Seelaus Mitnick, Chief Executive Officer, R. Seelaus & Co., Inc.
Principal, Seelaus Asset Management

PROGRAM AGENDA AND SPEAKERS *Continued*

2:30 p.m. – 3:20 p.m.

CONCURRENT AFTERNOON SESSIONS – 2nd Floor Salons

Choose ONE session:

GOVERNING YOUR CORPUS: FROM POLICIES TO PRACTICES (Beginner)

Fiduciary responsibilities, detecting fraud, and other duties need not be intimidating

- Mike Chase, Fiduciary Investment Advisors, LLC
- Tom Moore, Glenmede
- Michael Pages, J.P. Morgan

Facilitator: Marsha Atkind, The Healthcare Foundation of New Jersey

UNDERSTANDING THE COST OF INVESTMENTS: NEGOTIATING AND TRACKING MANAGEMENT FEES (Intermediate)

Make sure you're getting a deal as good as it looks

- Glen Corbitt, Peapack-Gladstone Bank
- Joe Matina, UBS Financial Services Inc.
- Benjamin Seelaus, Seelaus Asset Management

Facilitator: Irene Cooper-Basch, Victoria Foundation

EFFECTIVE APPROACHES TO SMALL ENDOWMENT STEWARDSHIP (Beginner/Intermediate)

Size doesn't matter when it comes to best practices

- Leslie Quick, Massey Quick Simon
- Ned Rosenman, BlackRock

Facilitator: John Holman III, The Pingry School

A PRIMER ON CRYPTOCURRENCY (Beginner/Intermediate/Advanced)

Learn about the disruptive potential of Blockchain Technology

Presenter: Andy Kapyrin, RegentAtlantic

3:30 p.m. – 4:30 p.m.

CLOSING RECEPTION – Library

Host Sponsor: PNC Financial Services Group, Inc.

Closing Remarks: Thomas Calimano, Market Director/Senior Vice President
PNC Institutional Asset Management

KIM Y. LEW

Kim Y. Lew is Vice President and Chief Investment Officer of Carnegie Corporation of New York, a private foundation established in 1911 by Andrew Carnegie that supports “the advancement and diffusion of knowledge and understanding.” The \$3.5 billion portfolio is global in scope and diversified by asset class and strategy.

While at Carnegie, she also served as Co-Chief Investment Officer and Director of Investments with responsibility for private equity. Prior to joining Carnegie, Kim spent 13 years at the Ford Foundation where she first managed a portfolio of public technology stocks and then managed the private equity portfolio. Before Ford, she invested in private placements while at Prudential Capital and started her career working in middle-market banking at Chemical Bank.

Kim earned a BS from the Wharton School of the University of Pennsylvania and an MBA from Harvard Graduate School of Business. Additionally, she was awarded her Chartered Financial Analyst designation and served as both a grader and standard setter for the CFA exam.

Kim serves as Chair of the Board of Trustees of the Stevens Cooperative School. She is also on the boards of Ariel Investments Mutual Funds and TIFF Advisory Services, where she serves on both Audit Committees. She serves on the Steering Committee of Private Equity Women Investor Network and is a member of the Investment Committees of the ACLU and Wesleyan University. She is married and the mother of two daughters.



MICHAEL GRIFFIN

Michael Griffin is a Managing Director and Investment Specialist in Private Banking at J.P. Morgan. In his role, he is responsible for advising ultra high net worth individuals, foundations, and senior executives on a range of financial matters, including asset allocation, portfolio construction, equities, fixed income, and alternative investments.

Prior to his current role, Michael worked in the Private Bank's Equities group as a member of the equity strategy team. His focus included single stock opportunities, thematic ideas, and customized investments. Before joining the Private Bank in 2010, he spent five years at J.P. Morgan Investment Management as an equity trader for the U.S. mutual fund business. Prior to that, he was with Bear Stearns for three years in various roles.

Michael has a bachelor's degree in finance from Loyola University Maryland and an MBA in finance from Fordham University. He lives in Madison, NJ with his wife and four children.





Make an impact

Every day, wealthy investors make spending, philanthropic and even career decisions to help make the world a better place. When it comes to investing, few investors act with the same sense of purpose.

From philanthropy to legacy planning to sustainable investing, the Matina Group shares your vision for a better future.



Joseph Matina

Managing Director—
Wealth Management
Private Wealth Advisor
joseph.matina@ubs.com

UBS Financial Services Inc.

Private Wealth Management

51 JFK Parkway, Suite 240
Short Hills, NJ 07078
877-452-4344



Maryellen Frank

Account Vice President
Private Wealth Advisor
maryellen.frank@ubs.com

ubs.com/team/matinagroup



As a firm providing wealth management services to clients, UBS Financial Services Inc. offers both investment advisory services and brokerage services. Investment advisory services and brokerage services are separate and distinct, differ in material ways and are governed by different laws and separate arrangements. It is important that clients understand the ways in which we conduct business and that they carefully read the agreements and disclosures that we provide to them about the products or services we offer. For more information, visit our website at ubs.com/workingwithus. **Private Wealth Management is a division within UBS Financial Services Inc., which is a subsidiary of UBS AG.** © UBS 2018. All rights reserved. UBS Financial Services Inc. is a subsidiary of UBS AG. Member FINRA/SIPC. CJ-UBS-2017808203 Exp.: 10/31/2019



MARSHA ATKIND

Marsha is Executive Director/CEO of The Healthcare Foundation of NJ, an independent foundation dedicated to improving the health and wellbeing of vulnerable, underserved people in Greater Newark and the Jewish community of MetroWest, NJ, elevating the quality of community healthcare, reducing access disparities, and infusing humanism into our healthcare system. She was founding Director of the Jewish Women's Foundation of NJ and President of NCJW, Inc., an organization of 90,000 members and

supporters with over 100 affiliates across the U.S.; she was Treasurer and chaired the Investment Committee. She earned a bachelor's degree in English from the University of Pennsylvania and attended Columbia Law School. Marsha received the Alpha Epsilon Phi Susan Rudd Cohen Award for Outstanding Communal Service and NCJW's Hannah G. Solomon Award.



EMILY M. BERGER

Emily Berger, CFA, is Director of Investment Risk Advisory Services at PKF O'Connor Davies, specializing in investment and operational due diligence for alternative funds, risk and performance reporting, and board advisory services. Emily previously served as Director of Risk and Operations at the Rockefeller Foundation, overseeing the activities of the Investments Office. Prior to joining the Rockefeller Foundation, Emily spent 19 years in various credit risk management roles. From 2003 to 2011, Emily was a Senior

Counterparty Credit Officer at J.P. Morgan, responsible for the credit, market, operational, and legal risk management of a portfolio of hedge funds and private equity funds. Emily earned her BS from Cornell University in applied economics and is a CFA charterholder. She serves on the Advisory Council for Cornell's Entrepreneurship Program.



CHRISTOPHER E. BLUME

Chris is Chief Investment Officer of the Goldman Sachs Portfolio Management Group, providing services to institutional clients. Before joining the Group, he was a senior member of the Investment Strategy Group, responsible for developing market and economic views and advising clients on strategic and tactical asset allocations. He spent two years in Hong Kong, establishing the Group's presence in the region.

Chris spent the first 10 years of his career at Goldman Sachs as a fixed income portfolio manager, handling portfolios for central banks, pensions, insurance companies, and foundations. He joined Goldman Sachs in 1994 and was named Managing Director in 2006. Chris earned an MBA from the Wharton School, University of Pennsylvania, and serves on the University of Pennsylvania Cross Country/Track and Field board.



THOMAS CALIMANO

Tom is a Market Director with PNC Institutional Asset Management and has more than 25 years of investment management experience with corporate assets, retirement plans, and nonprofit organizations. He is a member of the Institutional Investment Policy Committee and leads a team of investment advisors and sales professionals in the New York/New Jersey market. Tom previously held the positions of Senior Business Development Officer and Senior Portfolio Manager with the firm. Prior to joining the firm, Tom was a senior portfolio manager with a New York institutional money management firm, where he provided investment services to endowment funds and multi-employer pension and benefit plans. Tom earned his Bachelor of Science degree in accounting and his MBA in finance from St. John's University.



MICHAEL CHASE

Mike is a Partner and Senior Consultant at Fiduciary Investment Advisors, LLC, working mainly with the firm's endowment and foundation and family clients. His expertise includes asset allocation and investment portfolio construction, capital markets analysis, investment manager evaluation, and fiduciary governance oversight. Mike chairs the Endowment & Foundation Committee and is on the Discretionary Investment Services Committee, which is responsible for oversight and management of the firm's discretionary investment portfolios. Mike is a contributing member of the firm's manager research group, focusing primarily on private investment strategies. Before coming to FIA, he was an Associate in the Global Wealth Management division of AllianceBernstein, LP. Mike is a graduate of Colgate University, and earned his MBA from the University of Connecticut School of Business.



JOHN W. CHURCH, III

John Church, CFA is a Senior Portfolio Manager for Endowments and Foundations in Glenmede's Philadelphia office. He provides investment advice and portfolio management for foundations, endowments, and other nonprofits. John joined Glenmede in 2001. Before joining the Endowments and Foundations team, he worked in the Manager Research Group, performing due diligence on externally managed strategies. He also sits on the firm's Manager Research and Private Investment Committees. John is a CFA® charterholder and a member of the CFA Society of Philadelphia, serving on numerous conference planning committees. He is a trustee for St. Mark's Church in Philadelphia, chairs the Investment Committee for the Orpheus Club of Philadelphia, and is a member of the Finance Council for St. Katharine of Siena Church in Wayne, PA.



BILL CONGER

Bill has been involved in the financial markets for more than 45 years. He was a fixed income trader at Morgan Stanley for 10 years and became a principal in the firm, worked at a hedge fund, and traded bankrupt and distressed debt for 10 years. The past 20 years have been spent managing money and the Registered Investment Advisor he co-founded with his wife. Red Hook Management recently celebrated its 10th anniversary.

Bill also serves as chair of the Investment Committee of the Morristown Medical Center Foundation Endowment and chairs the board of The Raptor Trust in Millington, NJ. He was graduated from the University of Maryland and is a veteran of the Vietnam War.



IRENE COOPER-BASCH

Irene joined Victoria Foundation in 2003 and became Director in 2006. With an endowment of \$275 million, the Foundation awards \$11 million in grants annually. Previously, she was founding Program Officer for The Healthcare Foundation of New Jersey. Irene holds numerous leadership roles, including as a trustee or advisory board member for: Newark Trust for Education, Newark City of Learning Collaborative, Safer Newark Council, Newark 2020, Newark Education Funders Affinity Group, NJPAC, and

the Russ Berrie Unsung Hero Awards. Irene is the past chair of the Council of New Jersey Grantmakers board, and served as the Fundraising Chair for Newark Celebration 350. She holds a bachelor's degree from New York University, a master's from Drew University, and a Ph.D. in urban systems from Rutgers University-Newark.



GLEN CORBITT

Glen Corbitt is a Senior Managing Director and Senior Portfolio Manager, Private Wealth Management, at Peapack-Gladstone Bank and also functions as the equity analyst for International and Emerging Markets equity allocations. He is part of the bank's experienced financial services team responsible for managing Peapack-Gladstone Bank's trust and investments function, helping to guide clients with overall wealth advisory services and solutions. Previously, Glen worked

at U.S. Trust and its predecessors and at Rockefeller & Company in New York City. He spent five years as an officer in the U.S. Army. Glen received a bachelor's degree from Providence College and an MBA from New York University. He is a member of the New York Society of Security Analysts and CFA Institute.



CHRISTOPHER J. CORDARO

Chris Cordaro is Chief Investment Officer and architect of RegentAtlantic's investment philosophy and planning structure. Chris manages client relationships and provides advice to the firm on concentrated stock positions, stock options, and executive compensation plans. Chris is a regular guest on CNBC, has appeared on *Bloomberg Business*, *Nightly Business Report*, and *Reuters TV*, and is quoted regularly in media, including *The New York Times* and *The Wall Street Journal*. In addition to a BS in

economics, an MS in financial planning, and an MBA in finance, he holds CERTIFIED FINANCIAL PLANNER™ and Chartered Financial Analyst® certificates. He serves on the board of the NJ Metro Chapter of the National Multiple Sclerosis Society.



MICHAEL W. CROOK

Michael Crook is Managing Director at UBS and heads Investment Strategy in the U.S. Chief Investment Office, where he provides asset allocation and strategy advice to UHNW and institutional clients. He is an adjunct professor of economics, blogger, podcast host, and author. Previously, Michael worked as a discretionary portfolio manager for Lehman Brothers outsourced CIO business, an investment strategist at Barclays, and a research fellow at the American Institute for Economic

Research. Michael is a frequent commentator for financial media, including *Fox Business News*, *Bloomberg*, *On Wall Street*, *Barron's*, and *Business Insider*. Michael volunteers with charities focused on youth educational achievement and financial literacy. He earned a BS in consumer economics at the University of Georgia and an MA in economics at New York University.



CALEB D. CROQUART

Caleb is National Investment Director for PNC Institutional Advisory Solutions. He is responsible for oversight and leadership of IAS investment professionals and ensuring consistent delivery of investment advice and open architecture platform solutions. Caleb also represents PNC's institutional business as the senior investment spokesperson, supports the communication of Institutional Asset Management's thought leadership, and chairs the Institutional Investment Policy

Committee. In addition, he is a contributing member on all senior research and strategy committees. Before assuming his current position, Caleb was a Relationship Manager with PNC Capital Advisors and earlier was an Associate Investment Advisor with PNC Wealth Management®. Caleb earned a BSBA in finance and banking from the University of Missouri-Columbia and holds the Certified Trust and Financial Advisor designation.



PETER J. DONCHEZ

Peter is an Executive Director and Investment Specialist for the Tri-State Region of the J.P. Morgan Private Bank. He advises ultra high net worth individuals, foundations, and senior executives on a range of financial matters that include asset allocation, portfolio construction, equities, fixed income, and alternative investments. Peter also sits on the Private Bank's Global Analyst Council. Prior to joining the Tri-State Region, Peter spent two years as a member of J.P. Morgan's Private Bank's Global Clients Group,

which serves the needs of many of the Private Bank's largest and most complex international clients. Prior to his tenure at J.P. Morgan, Peter worked in Corporate Finance at IBM Global Finance. He was graduated from Lehigh University with a bachelor's degree in finance.



STEVE FABER

Steve Faber serves as a Managing Director for PFM, working from the firm's Princeton office. He is directly responsible for marketing PFM's investment advisory services, including the firm's outsourced CIO and fixed income offerings, to clients in the Northeast. Additionally, Steve works with clients to develop and implement portfolio solutions to meet long-term investment objectives. Prior to joining PFM in 2001, Steve served as a senior investment banker in the public finance group of First Union

Securities, where he was responsible for originating and structuring debt transactions and derivative applications for issuers throughout the Mid-Atlantic region. Steve is a member of numerous finance organizations and is a frequent speaker on investment-related topics. Steve earned a BA in politics from Princeton University.



MARYELLEN FRANK

Maryellen brings over 25 years of experience at UBS Wealth Management and Investment Bank, and a specialization in currencies and commodities, to The Matina Group. At UBS Investment Bank she held a variety of executive roles, including heading up a sales desk on the world's largest trading floor. Within Investment Banking Product Solutions, she worked closely with individuals and families of substantial wealth, delivering innovative investment solutions. Maryellen completed

the firm's Private Wealth Advisor program, exemplifying her dedication to serving the complex needs of individuals and families with substantial wealth. She has a specialization in working with families and foundations on sustainable and impact investing, as well as financial literacy for the next generation. Maryellen earned her bachelor's degree from Pennsylvania State University.



BILL GIBSON

Bill Gibson, CIMA, is a First Vice President and Wealth Management Advisor at Merrill Lynch. Bill has received the Lifetime Community Achievement Award from Merrill Lynch, where he has worked since 1994. Previously, he was with Honeywell, GE, and Dow Chemical. He is a trustee of The Leavens Foundation, Inc., serves on the New Jersey Symphony Orchestra Endowment Committee and the Advisory Board of Trust for Public Land, and chairs CNJG's Finance and

Investment Affinity Group. He holds an MBA in investment finance from New York University and is an alumnus of Harvard Business School and Bucknell University.



ALEX GURVICH

Alex has more than 20 years of industry experience. At PFM, Alex serves as Director of Research, and is on the Investment Committee and the Economic and Capital Markets Outlook Committee. Before coming to PFM, he was a Director of Quantitative Research at Commonfund. Before that, he was a quantitative equity portfolio manager at The Rockledge Group. Alex has also worked as venture capitalist for GE Capital and as a strategy consultant for Bain and Company. Alex earned a BA

in physics at the University of Chicago, an MBA in finance and business strategy at INSEAD in France, and a master's degree in financial engineering from New York University Polytechnic Institute. He is a doctoral candidate in financial engineering at Stevens Institute of Technology.



CHRISTINE L. HEALEY

Christine L. Healey is a senior executive with strategic and operational leadership experience in managing nonprofit organizations. Under her leadership as President, the Healey Education Foundation has served nearly 70 elementary and high schools across six dioceses in Delaware, Maryland, Minnesota, New Jersey, and Pennsylvania. She co-founded and chairs the board of the Catholic Partnership Schools in Camden. Christine received the Saint Joseph's University Ratio Studiorum Award for

exceptional leadership contributing to the future of high-quality, competitive Catholic education. Her career began in critical-care nursing and health administration, including healthcare management and policy work for the U.S. Public Health Service. Christine holds a Master of Science degree from Saint Joseph's University and a bachelor's degree in nursing from Georgetown University.



MATTHEW HOEHN

Matthew Hoehn, Director, is a Client Chief Investment Officer for the Foundations & Endowments team within Client Portfolio Solutions at BlackRock. Matt spent 14 years at Goldman Sachs Asset Management and from 2006-2015 worked on the Quantitative Investment Strategies team. Matt was portfolio manager on one of the first publicly available hedge fund replication strategies. He also managed portfolios for foundations, endowments, public pensions, and insurance companies. During his last two years at GSAM, Matt was Lead Portfolio Manager for U.S. and Asia-based institutional multi-asset accounts deemed "strategic partnerships." Matt graduated from The College of New Jersey with a double major in economics and English and completed a master's degree in economics at New York University.



MARK B. HOFFMAN

Mark Hoffman is Managing Director and Head of Portfolio Management & Analytics for the PNC Asset Management Group. He works with internal teams on a unified, transparent approach to portfolio construction, and to communicate PNC's portfolio construction methodology and interpretation of model portfolio results. Mark oversees development of analytical tools for assessing market, credit, and operational risk of investment strategies. He also leads the Investment Strategy & Services Quantitative team, tasked with continually refining the portfolio construction process. Mark received a bachelor's degree in astronomy and astrophysics from Yale University, M.Phil. in physics from the University of Cambridge, and a Ph.D. in physics from the University of Chicago. He earned the Chartered Financial Analyst® designation and is a member of the CFA Society of Philadelphia.



JOHN W. HOLMAN III

John Holman was until recently a Managing Director and partner at Eagle Capital Management LLC, where he was responsible for relationships with many of the firm's foundation, endowment, family office, pension, and sovereign clients. John is a Director and Chair of the finance committee of The Hyde and Watson Foundation, and a trustee and former chair of the investment committee of The Pingry School. He is also a member of the President's Council at Wesleyan University, the UVM Foundation Leadership Council, and a director of Grants Financial Publishing. He received a bachelor's degree with honors in English from Wesleyan University in 1983.



ANDY KAPYRIN

Andy is responsible for researching and analyzing valuations and market conditions, which help to inform RegentAtlantic's asset allocation. A member of RegentAtlantic's Investment Committee, Andy monitors and rebalances client portfolios. He is focused on the firm's bond holdings, and also is responsible for trading, analyzing, and helping to manage risk for clients' corporate and municipal bond holdings. Andy produces on a quarterly basis the RegentAtlantic New Jersey Wealth Index, a proprietary method for measuring the health of wealth in New Jersey. Andy is a Chartered Financial Analyst® Charterholder, and a member of the CFA Society of New York.



DEBORAH KASEMEYER

Deborah Kasemeyer oversees Northern Trust's community development capital deployment and an Impact Investment portfolio surpassing \$1.5 billion. An early adopter of innovative community finance structures, she developed expertise in Social Impact Bonds, also known as Pay for Success. Deborah works to fill capital gaps in underserved communities across the U.S. She manages Northern Trust's Community Reinvestment Act program, which received nine consecutive Outstanding CRA ratings spanning 22 years of evaluation. Deborah graduated from DePauw University with a bachelor's degree in economics. Her board memberships include IFF, a large regional CDFI headquartered in Chicago; the National Association of Affordable Housing Lenders based in Washington, D.C.; and Akola, a social enterprise business in Dallas and Uganda.



MANISHA KATHURIA

Manisha Kathuria, CAIA, Vice President, joined Neuberger Berman in 2017. Manisha is the Portfolio Specialist for the Core Equity and SRI strategies. Prior to joining the firm, Manisha worked at a nonprofit organization in Cambodia, negotiating and implementing social finance solutions with microfinance institutions. Before that, she was an Associate Director in the institutional nonprofit group at Russell Investments, where she contributed to the growth of the nonprofit investment management business. She also served as a member of the Russell Global Sustainability Council, driving initiatives to enhance the firm's capabilities in sustainable investing. Manisha has earned an MBA from Columbia University as well as undergraduate and master's degrees in computing from the National University of Singapore. She received the Chartered Alternative Investment Analyst designation.



KENNETH KLEIN

Kenny, who has more than 30 years of industry experience, joined Seelaus Asset Management in 2016 to launch the Granite Springs Total Return Fund. Previously, he served as President and CIO of Citation Advisors, LLC, a subsidiary of Mitsubishi Corporation Asset Management. Prior to Citation Advisors, he served as a Senior Managing Director, Lead Portfolio Manager, and member of the Executive Committee at Aladdin Capital Holdings LLC, where he managed credit assets that included the

Citation Funds. Prior to Aladdin, Kenny worked for Dresdner Kleinwort LLC, Paine Webber International Ltd., Oppenheimer & Company Inc., and Salomon Brothers Inc., where he held various credit trading and management roles. Kenny holds a bachelor's degree in government from Cornell University.



JOE W. KWOK

Joe Kwok is a Senior Managing Director, Portfolio Manager at Murphy Capital Management, a subsidiary of Peapack-Gladstone Bank. Before coming to Murphy Capital Management, Joe was a Vice President in investment banking for Putnam Lovell NBF Securities and its successor firm, Jefferies & Co., where he advised corporate clients on mergers and acquisitions, capital raising, and other corporate finance activities. Previous to investment banking, he worked on the formation of First American International Bank.

Joe holds a bachelor's degree in biological sciences and a minor in economics from Stanford University and a Master of Arts in economics from New York University.



JOSEPH MATINA

As Managing Partner for the Matina Group, Joseph brings over 20 years of experience managing wealth. Focusing on a risk-management approach, he is responsible for determining asset allocation, investment manager selection, and monitoring investment performance for clients. Joe completed the firm's Private Wealth Advisor accreditation program. In 2015, 2016, and 2017, he was named to the *Financial Times* Top 400 Advisors in America list and the *Barron's* Top 1200 Financial Advisors. The

Matina Group was featured in the November 2015 issues of *Bloomberg Businessweek*, *Fortune*, and *Money* magazines. Joe was graduated from Albright College and serves on the college's Business Advisory Council. Believing that commitment to the community is vital, Joe has provided consistent support to many nonprofit organizations, including Partners for Women and Justice.



ANDREA MCANDREW

Andrea is a consultant and Research Analyst at Fiduciary Investment Advisors, LLC, where she is a member of the manager research group. Andrea has over 15 years of investment experience with a focus on alternative investments. Before joining FIA, Andrea was a Managing Director at Alpha Capital Research, LLC, where she was responsible for hedge fund manager sourcing, due diligence, and portfolio analysis for the firm's fund of fund products and family office clients. Before joining Alpha

Capital, Andrea was an endowment administrator at Choate Rosemary Hall and prior to Choate she was responsible for compliance and administration at ARA Portfolio Management. Andrea has earned the right to use the Chartered Financial Analyst® designation. Andrea received a Bachelor of Science degree from Lehigh University.



PETER MLADINA

Peter Mladina is Director of Portfolio Research for Northern Trust Wealth Management, where he is responsible for the application of leading research to the wealth management investment process. This includes research, tools, and methods that support asset allocation, portfolio construction, investment selection, and best practices in portfolio management. Peter is an Adjunct Professor of Economics at UCLA, where he teaches applied finance for the Master of Applied Economics program.

His research on asset allocation and portfolio construction has been awarded publication in peer-reviewed journals, and he is a co-author of the CFA Institute's Level III asset allocation curriculum. He received a bachelor's degree in economics from UCLA and an MBA from Edinburgh Business School in Scotland.



CHRISTOPHER B. MOORE

Chris Moore is Chief Investment Officer/Managing Partner at Massey Quick Simon. He is a CERTIFIED FINANCIAL PLANNER™ practitioner, graduating with a bachelor's degree from the College of the Holy Cross and earning his MBA from Columbia Business School, where his studies were concentrated in finance and investments. Chris sits on the firm's Management and Investment committees, providing insight on strategy, management, financial planning,

and investments. He has responsibility for overseeing the firm's asset allocation and portfolio construction process and works closely with the Client Advisors. He also oversees the Investment Research Team and due diligence process across equity, fixed income, hedge fund, private equity, real estate, and venture capital investments. Chris has been interviewed by *Bloomberg*, *The Wall Street Journal*, and *The New York Times*.



THOMAS MOORE

Thomas Moore, a Relationship Manager in Glenmede's Philadelphia office, provides advisory and administrative services to endowments, foundations, and other nonprofits. He lends his experience in administrative best practices, grants, foundation, and board management. Before joining Glenmede, Thomas spent nearly 12 years at the Merrill Lynch and U.S. Trust subsidiaries of Bank of America Corporation. He was an internal trust specialist, educating clients on philanthropic and wealth transfer techniques.

He also led a team of trust professionals responsible for managing institutional nonprofit client accounts. Previously, Thomas served as Director of Philanthropic Services for the Berks County Community Foundation in Reading, PA. He received a Master of Laws degree in taxation from Villanova University and a Juris Doctor, magna cum laude, from the Dickinson School of Law.



MICHAEL PAGES

Michael Pages is a Vice President and Banker for J.P. Morgan, where he advises foundations, endowments, and select families on a variety of matters including asset allocation, portfolio construction, and capital and liquidity strategies and execution. Before joining J.P. Morgan, Michael was at Goldman Sachs as an investment advisor focused on the needs of financial sponsors and nonprofit clients. Michael has a bachelor's degree in political science from Amherst College and graduated from

Columbia Business School. He was a 2010 GS Fellowship recipient and received the William J. Heffernan Award for Exemplary Service to the Community. Michael sits on the Corporate Advisory Board of the Statewide Hispanic Chamber of Commerce and was Treasurer and Finance Committee Chair for Philips Education Partners.



CARLA E. PANZITTA

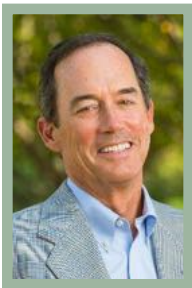
Carla Panzitta is a Business Development Director in Glenmede's Morristown office, responsible for developing relationships with high net worth individuals, families, endowments, and foundations. Before joining Glenmede, Carla spent 10 years as a management consultant in the Financial Services Group of Accenture. She worked primarily with global brokerage firms, banks, and credit card companies, solving large-scale, complex issues related to organizational

changes, technology infrastructure, and strategic initiatives. Carla was a member of the Summit Area YMCA board and held various positions in the parent associations for Delbarton School and Kent Place School as well as the Parents' Leadership Committee at Villanova University. She is a longstanding member of the Summit Junior League, serving on the Endowment Committee, and has been active with the Morristown Women's Association.



CHRISTOPHER PETERMANN

Christopher Petermann is a partner at PKF O'Connor Davies, LLP and serves as Co-Partner-in-Charge for the Private Foundation Practice. He has more than 30 years of specialized experience in accounting for exempt organizations and private foundations, as well as closely-held businesses and financial services entities. Chris also holds a number of professional committee and community board positions. A regular speaker on accounting, tax, and governance matters, Chris contributes informational pieces to the firm's monthly bulletins and has authored numerous articles for industry publications. Chris is a Certified Public Accountant in New Jersey and New York.



LESLIE C. QUICK III

After graduating from St. Bonaventure University with a BBA in finance, Leslie began his career in 1975 at Quick and Reilly Inc., the first New York Stock Exchange member firm offering discounted commissions to individuals. He was a key member of the management team that built one of the industry's first electronic internet trading platforms. He completed his tenure as Chairman of Fleet Securities, Inc. in 2003 after Fleet Bank had acquired Quick and Reilly Group, Inc. in 1998. Leslie co-founded Massey Quick (now Massey Quick Simon) in 2004. He chairs the board of Big Brothers Big Sisters of Hudson, Essex & Union Counties. Leslie received the Ellis Island Medal of Honor and the Flame of Charity's Man of the Year award.



NED ROSENMAN

Ned Rosenman, Director, is a member of BlackRock's Institutional Client Business, where he is responsible for providing investment management and advisory solutions to endowments and foundations. Prior to this role, Ned spent 10 years in BlackRock's multi-asset and alternatives businesses. He led the team's advisory engagements with endowments and foundations, providing investment strategy and risk advice to U.S.-based institutions. Ned helped to design and build the firm's Outsourced CIO business in the U.S. and helped integrate the firm's multi-asset capabilities during its merger with Barclays Global Investors. Ned began his career in BlackRock's Proprietary Alpha Strategies Group, where he was a lead product specialist representing BlackRock's commodity products and equity hedge fund strategies. Ned earned a bachelor's degree in English literature from Princeton University.



KEI SASAKI

Kei A. Sasaki is the Regional Chief Investment Officer for the Northeast region of Wells Fargo Private Bank. He has more than 20 years of industry experience specializing in capital markets research, portfolio management, and asset allocation strategy. Kei leads a team of investment professionals who deliver comprehensive, custom, and diversified portfolio management for clients of The Private Bank. He serves as the investment thought leader in the Northeast, providing insight and interpretation of the economy and financial markets. Kei received a Bachelor of Science

in international business and finance from New York University and a Master of Business Administration from Fordham University. He is a CFA® charterholder and member of the CFA Institute and the New York Society of Security Analysts.



BENJAMIN SEELAUS

Ben joined R. Seelaus & Co., Inc., the parent company of Seelaus Asset Management, as a Managing Director in 2014. As Chief Operating Officer, he is responsible for the firm's macro growth initiatives, including growing Seelaus Asset Management. Before joining Seelaus, he was a Managing Director at Morgan Stanley and head of the U.S. Government Bond Trading desk. While there, Ben managed over \$40 billion in balance sheet and positions, and maintained a tier one ranking in key market share

statistics. He began his career at HSBC and J.P. Morgan and brings more than 10 years of capital markets experience to the table. Ben is a graduate of Seton Hall Prep and Princeton University.



ANNELIESE SEELAUS MITNICK

Annie joined her father at R. Seelaus & Co., Inc., the parent company of Seelaus Asset Management, in 2009 and took over as CEO in 2015. Under Annie's leadership, both firms achieved certification as National Women's Business Enterprises and State of New Jersey Women's Business Enterprises. Annie brings a wealth of big firm experience to the trading desks at Seelaus. Previously, she served as a Senior Vice President at HSBC, spending 10 years on the corporate bond and emerging markets

sales and trading desk, working in London and New York. While there, her desk was a leader in the primary market for Sterling and Euro-denominated corporate bonds. Annie graduated from Oak Knoll School and obtained a bachelor's degree from Princeton University.



J. PETER SIMON

J. Peter Simon became a partner at Massey Quick Simon in 2017. Before that, he co-founded William E. Simon & Sons, LLC along with his late father, former Treasury Secretary William E. Simon, and his brother. Peter also served as Managing Director in the Convertible Securities Department at Kidder Peabody. He earned a bachelor's degree in psychology from Lafayette College and attended NYU's Graduate School of Business. He is an emeritus member of the Lafayette College

board of trustees. At the University of Rochester, he is an emeritus member of the Executive Advisory Committee at The William E. Simon School of Business. He co-chairs The William E. Simon Foundation and is a member of the board of trustees of the Richard Nixon Foundation.



JAMES R. SONNEBORN

Jim has over 30 years of experience managing investment portfolios and providing financial advice to individuals, families, and charitable organizations in the New York metropolitan region. He is a member of RegentAtlantic's Investment Committee, helping shape the firm's investing strategy. As a Wealth Advisor and Chair of the firm's Neighborhood Nonprofits Group, Jim has a particular expertise working with nonprofits. Jim serves on the Board of Trustees and is Chair of

the Investment Committee for the Fannie E. Rippel Foundation. Jim holds a bachelor's degree in business from Western State College of Colorado and an MBA in finance from Drexel University, as well as the CERTIFIED FINANCIAL PLANNER™, Chartered Financial Analyst, and Certified Divorce Financial Analyst certifications.



JUDY SPALTHOFF

As head of the Family and Philanthropy Advisory team at UBS, Judy leads senior strategists working with families on understanding money, values, and philanthropic intent in the family wealth context and the dynamic overlap of human, intellectual, social, foundational, and financial capital. Judy joined UBS in 2008 from Citi Family Office, where she was International Services Manager. Judy graduated from Drexel University and received her MBA from New York University.

She completed the 21/64's levels 101 and 201 next generation training, Carnegie Mellon Leadership and Negotiation Academy for Women, the Generational Wealth Transfer workshop given by the Institute for Preparing Heirs, received the Family Firm Institute Certificates in Family Wealth Advising and Family Business Advising, and earned the Chartered Advisor in Philanthropy® designation.



WARREN TRANQUADA

Warren, Executive Vice-President and Chief Operating Officer for NJPAC, is responsible for governance, administration, and operations, including supervising the finance, IT, ticketing, human resources, rentals, food services, parking, site operations, and house management departments. He facilitates strategic planning and provides support to NJPAC's real estate development activities. He previously was NJPAC's CFO.

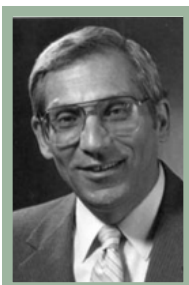
Warren was a partner and co-founder of Aperio, a social sector consulting firm that works with organizations in the areas of earned income development and strategic planning. Before Aperio, he was a VP at Chase, and an Associate Consultant at Bain & Company. Warren has an MBA from Harvard Business School and a Bachelor of Commerce from McGill University. He won *NJBiz's* 2014 CFO-of-the-Year in the category of Large Non-Profit.



MICHAEL VAKNIN

Michael Vaknin serves as Chief Markets Economist for J.P. Morgan Private Bank. He is responsible for the global, macroeconomic, and market research that underpins the firm's views and, by extension, how client portfolios are positioned. Michael co-chairs the Private Bank Global Investment and Brokerage Committees, which guide asset allocation and market strategy decision-making for J.P. Morgan private clients across the globe. Before joining J.P. Morgan, Michael was a Senior Global Markets Strategist at Goldman Sachs

International in London. He earned a master's degree and Ph.D. in economics and finance from Columbia University, and worked as a research assistant to Richard Clarida, Vice Chairman of the Federal Reserve, as well as for Nobel Laureates Joseph Stiglitz and Edmund Phelps.



EDWARD D. ZINBARG

Edward Zinbarg is a former Director of Merrill Lynch (now BlackRock) mutual funds, serving from 1994 to 2006. He retired from Prudential Insurance Company in 1994 as Executive Vice President, having served in leadership roles including Chief Administrative Officer, Chief Investment Officer for publicly-traded securities, and Chief Economist, over 30 years. He volunteers on many nonprofit boards, including the New Jersey Symphony Orchestra, the Rabbinical School of the Jewish

Theological Seminary, and the Jewish Community Foundation of Greater MetroWest. Ed's degrees include a Ph.D in economics from New York University and Doctor of Letters in religion from Drew University. Books he has written include *Investment Analysis and Portfolio Management*, and *Faith, Morals, and Money: What the World's Religions Tell Us About Ethics in the Marketplace*.

values
+
vision
—
impact

Glenmede is proud to support
**COUNCIL OF NEW JERSEY
GRANTMAKERS**

Glenmede was created as an independent trust company over 60 years ago to serve as investment manager and trustee of the Pew family's charitable interests. Today, we manage \$40 billion for endowments, foundations, high-net-worth individuals and families, and institutional clients. To learn how Glenmede can help your organization, please contact Nina Cohen at 215-419-6722 or nina.cohen@glenmede.com.

GLENMEDE

Founded on ideals. Built on ideas.

glenmede.com

 [@glenmede](https://twitter.com/glenmede)
 [/company/glenmede](https://www.linkedin.com/company/glenmede)

Know

**the Council of New Jersey Grantmakers can
achieve anything when we work together.**

**PNC Institutional Asset Management is proud to
support CNJG at the 2018 Investment Forum for
Foundations and Endowments.**

*Ask Tom Calimano about
PNC Institutional Asset
Management
at 732-448-2880.*



©2018 The PNC Financial Services Group, Inc. All rights reserved. PNC Bank, National Association. **Member FDIC**

SEELAUS

ASSET MANAGEMENT

Forward-Looking, Backed by 35 Years of Experience

A Family Owned Business with Expert Investment Management and
an Innovative Outlook

Specializing in Fixed Income and Equity Portfolio Management

25 Deforest Avenue, Suite 308
Summit, NJ 07901



(855) 212.0955
www.rseelaus.com

151 Bodman Place, Suite 401
Red Bank, NJ 07701

CNJG

COUNCIL OF NEW JERSEY GRANTMAKERS

2018 ANNUAL MEETING & HOLIDAY LUNCHEON

♦ ♦ ♦ Friday, December 14, 2018 ♦ The APA Hotel Woodbridge ♦ ♦ ♦

♦ ♦ ♦ ♦ ♦ ♦ ♦ LIVING OUT YOUR MISSION ♦ ♦ ♦ ♦ ♦ ♦ ♦

www.cnjg.org



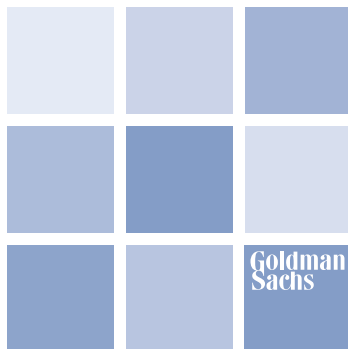
Put our experience to work for you

Advice for people
transforming their world

PHILADELPHIA 215.567.6100
PRINCETON 609.452.0263

pfm.com

For important disclosure information
please go to pfm.com/disclosures



Goldman Sachs is proud to
sponsor the Council of
New Jersey Grantmakers
Investment Forum for
Foundations and Endowments

© 2018 Goldman Sachs. All rights reserved.

NEUBERGER BERMAN

Neuberger Berman is proud to support

The Investment Council of
New Jersey Grantmakers:

*2018 Investment Forum
for Foundations and
Endowed Non-Profits*

www.nb.com

©2018 Neuberger Berman Group LLC. All rights reserved.

NEED MORE THAN AN INVESTMENT CONSULTANT TO ACHIEVE YOUR MISSION?

Contact our Northern Trust expert
within the Foundation & Institutional
Advisors practice today:

Steve Davis, Regional Director
617-235-1811 or SD273@ntrs.com

northerntrust.com/FIA



NORTHERN
TRUST

© Northern Trust Corporation. There are risks involved in investing, including possible loss of principal. There is no guarantee that the investment objectives of any fund or strategy will be met. Risk controls and asset allocation models do not promise any level of performance or guarantee against loss of principal.

KNOW GREATER VALUE®



908.272.6200

Christopher Petermann, Partner
cpetermann@pkfod.com

Scott A. Brown, Senior Manager
sbrown@pkfod.com

www.pkfod.com

An investment for today and tomorrow

BlackRock is a
proud sponsor of
the Council of New
Jersey Grantmakers'
Investment Forum for
Foundations and
Endowments.

BLACKROCK

Keep building at
BlackRock.com

©2018 BlackRock, Inc. All rights reserved. **BLACKROCK** is a registered trademark of BlackRock in the United States and elsewhere. 157982-1018 / 141908



FIA is proud to support the
**2018 Investment Forum for
Foundations and Endowments**

Fiduciary Investment Advisors is an independent, employee-owned investment consulting firm that works with fiduciary clients including non-profit organizations, retirement plan sponsors, institutional investment pools and private clients.

Our mission is to provide customized consulting services to assist our clients in achieving their investment objectives, while fulfilling their fiduciary obligations.

www.fiallc.com

866.466.9412 toll free

Windsor, CT • Boston, MA • Kennebunk, ME

Committed to our shared community



**Planned Giving
Endowment Management and Consulting
Retirement Plan Management**

regent**a**
atlantic

Jim Sonneborn
Partner and Wealth Advisor

jsonneborn@regentatlantic.com
908-373-2438

1200 Mount Kemble Ave, Morristown, NJ
www.regentatlantic.com

A copy of our current written disclosure statement discussing our advisory services and fees is available for your review upon request. Descriptions of RegentAtlantic's process and strategies are based on general practice and we may make exceptions in specific cases.



THE PRIVATE BANK

Wells Fargo Philanthropic Services



Maximizing the efficiency of charitable gifts

Wells Fargo manages nearly \$19 billion* in philanthropic assets—let our philanthropic specialists help you and your clients support the causes they care about.

Individual philanthropists

- Align giving with financial concerns, such as reducing transfer taxes or creating an income stream
- Establishing and administering a private foundation
- Implementing a donor advised fund

Nonprofit institutions

- Convert non-financial donations into cash
- Planned giving program development
- Investment management for endowments and planned gifts

To start a new kind of conversation, contact your local Wells Fargo Private Bank office:

Sangita Karra
Senior Philanthropic Specialist
NMLS ID: 0058730
609-799-3108
sangita.karra@wellsfargo.com

wellsfargoprivatebank.com

Wealth Planning • Investments • Private Banking • Trust Services • Insurance

*\$19.0 billion as of 10/31/2015

Investment and Insurance Products • NOT FDIC Insured • NO Bank Guarantee • MAY Lose Value

Wells Fargo Private Bank provides products and services through Wells Fargo Bank, N.A., the banking affiliate of Wells Fargo & Company, and its various affiliates and subsidiaries. Brokerage services are offered through Wells Fargo Advisors, LLC, Member SIPC, a registered broker-dealer and securities broker affiliate of Wells Fargo & Company. Real estate services available through Wells Fargo Real Estate, a subsidiary of Wells Fargo & Company. Insurance products are available through insurance subsidiaries of Wells Fargo & Company and underwritten by non-affiliated insurance companies. Not available in all states. © 2015 Wells Fargo Bank, N.A. Member FDIC. 000230 10/2015 100-000000



MQS

WEALTH MANAGEMENT
INVESTMENT CONSULTING

From the Investment
Committee to the Office
of Finance, MQS offers
support for your entire
organization.

Massey Quick Simon

Morristown, NJ • New York,
NY • Los Angeles, CA
www.mqsadvisors.com
973-525-1000

@MQSAdvisors

*Peapack-Gladstone Bank
proudly supports the*

*Council of
New Jersey
Grantmakers*



PEAPACK-GLADSTONE BANK

Private Banking since 1921

908-234-0700 • www.pgbank.com

Member FDIC



This image shows a single page of white paper with horizontal blue ruling lines. The lines are evenly spaced and run across the width of the page. There is no handwriting or other markings on the paper.

NOTES

NOTES

INVESTMENT FORUM ADVISORY COMMITTEE

Bill Gibson, Chair, The Leavens Foundation, Inc.
Marsha Atkind, Healthcare Foundation of New Jersey
Ned Atwater, Union Foundation
Cynthia Evans, Geraldine R. Dodge Foundation
Annmarie Puleio, The Fred C. Rummel Foundation
Richard A. Ribeiro, Turrell Fund
Warren Tranquada, NJPAC

CNJG STAFF

Jon Shure, Interim President/CEO
Kevin Callaghan, Newark Philanthropic Liaison
Anna D'Elia, Program and Services Coordinator
Patricia Foo, Office Manager
Theresa Jacks, Deputy Director
Craig Weinrich, Director of Member Services
Kari Williams, Finance Manager

Investment Forum Team
Jennifer Sancton, Producer
Louis Ciavolella, Designer

Adjunct Staff
Mary Trimbach, Webmaster



Council of New Jersey Grantmakers
**Investment Forum
for Foundations
and Endowments**

2018 Council of New Jersey Grantmakers Board of Trustees

Jonathan Pearson, Chair, Horizon BCBSNJ

William Engel, 1st Vice Chair, The Hyde and Watson Foundation

Annmarie Puleio, 2nd Vice Chair, The Fred C. Rummel Foundation

William Leavens, Secretary, The Leavens Foundation, Inc.

Cynthia Evans, Treasurer, Geraldine R. Dodge Foundation

Amanda Bauman

Campbell Soup Foundation

René Déida

The Prudential Foundation

Craig Drinkard

Victoria Foundation

Jeremy Grunin

Jay and Linda Grunin Foundation

Christine Healey

The Healey Education Foundation, Inc.

Kiki Jamieson

The Fund for New Jersey

Andrew Johnson

William Penn Foundation

Ari Kramer

Robert Wood Johnson Foundation

Barbara Lawrence

The Henry and Marilyn Taub Foundation

Marion O'Neill

PSEG Foundation

Barbara Reisman

Maher Charitable Foundation

Deborah Smith

Wells Fargo Foundation

Annette Strickland

Schumann Fund for New Jersey

Michael Unger

The Atlantic Foundation

Jeffrey Vega

Princeton Area Community Foundation

Jon Shure, Interim President/CEO,

Council of New Jersey Grantmakers

About the Council of New Jersey Grantmakers

The Council of New Jersey Grantmakers is the center for philanthropy in New Jersey, serving the leading independent, corporate, family, and community foundations of our state. We support our 125+ members by strengthening their capacity to address New Jersey's and society's most difficult problems. We also access the resources of the philanthropic community – funding, expertise, leverage – to provide leadership on statewide issues. Past leadership efforts include a study of healthcare conversions and their philanthropic legacies, creating access to philanthropic dollars in underserved communities, and partnering with the state to pilot a highly regarded national model that addresses crime prevention through youth development. In addition, the Council facilitated the landmark study, *Facing Our Future*, which outlined the fiscal crisis facing all levels of New Jersey government.

Council of New Jersey Grantmakers

111 West State Street • Trenton, NJ 08608

609-341-2022 • www.cnjg.org