FOUNDATION & INSTITUTIONAL ADVISORS CONFERENCE FOR NONPROFIT ORGANIZATIONS

THURSDAY, OCTOBER 1, 2015

Northern Trust

50 SOUTH LASALLE STREET | CHICAGO

AGENDA

10:15 – 10:45 AM	**Registration – 1ST floor**
10:45 AM – Noon	**Welcome, Assembly Room – 6TH floor** **Steve "Mac" MacLellan,** *President and Chief Executive Officer, Wealth Management, Central Region, Northern Trust* **Market Outlook, the Current State of Financial Markets and the Impact on Nonprofits, Assembly Room – 6TH floor** **Jim McDonald,** *Chief Investment Strategist, Northern Trust* **Carl Tannenbaum,** *Chief Economist, Northern Trust* *Moderated by* **Steve "Mac" MacLellan,** *President and Chief Executive Officer – Wealth Management, Central Region, Northern Trust*
Noon – 1:30 PM	**Lunch and Keynote Address, Assembly Room – 6TH floor** **Raymond C. Odom, JD, CFP,** *National Director of Wealth Transfer Services, Northern Trust*
1:30 – 1:45 PM	**Break**
BREAKOUT SESSIONS:	**Please refer to your personal agenda you recieved at check-in and attend the session you registered for.**
1:45 - 2:45 PM	**Alternatives and Private Equity Investing, Miami Room – 1ST Floor** **Robert Morgan,** *Managing Director, 50 South Capital* **Braden Waverley,** *General Manager, ABW Holdings, LLC and member of Investment Committee, DuPage Community Foundation* *Moderated by* **Thomas Kirkenmeier,** *Senior Investment Officer, Foundation & Institutional Advisors, Northern Trust*
1:45 - 2:45 PM	**Engaging Next Generation Donors and Leaders – Insights from the Field, Assembly Room – 6TH floor** **Jason Baxendale, MBA, JD,** *Senior Director of Planned Giving, Chicago Community Trust* **Katherine Groninger, PhD,** *Philanthropic Advisor, Major Gifts, Art Institute of Chicago* **Alexis Sutton,** *Senior Program Officer, Community Affairs, Northern Trust* *Moderated by* **Tim Bresnahan,** *Associate Director, Philanthropic Advisory Services, Northern Trust*
2:45 – 3:00 PM	**Break**

BREAKOUT SESSIONS:	**Please refer to your personal agenda you recieved at check-in and attend the session you registered for.**
3:00 – 4:00 PM	**How Can I SRI? Miami Room – 1ST floor** **Jordan Dekhayser,** *Portfolio Manager, Global Index Management, Northern Trust* **Sally Giegerich,** *Senior Portfolio Manager, Northern Trust* **Duane Roberts, CFA,** *Director of Equities, Dana Investment Advisors* *Moderated by* **Ophelia Barsketis,** *Senior Portfolio Manager, Foundation & Institutional Advisors, Northern Trust*
3:00 – 4:00 PM	**Getting Your Board on Board: Empowering your Board to be Ambassadors for your Organization, Assembly Room – 6TH floor** **Lisa Morrison Butler,** *Commissioner of the Department of Family & Support Services, City of Chicago* **Dorri McWhorter,** *Chief Executive Officer, YWCA Metropolitan Chicago* **Eric Weinheimer,** *President and Chief Executive Officer, Donor's Forum* *Moderated by* **Marguerite Griffin,** *National Director, Philanthropic Services, Northern Trust*
BREAKOUT SESSIONS:	**Please refer to your personal agenda you recieved at check-in and attend the session you registered for.**
4:00 – 5:00 PM	**How Cyber Security Affects Nonprofits, Director's Dining Room – 6TH floor** **Kevin Novak,** *Chief Information Security Officer, Northern Trust* **William Barouski,** *Deputy Chief Information Security Officer, Northern Trust*
4:00 – 5:00 PM	**Building a Sustainable Organization: Best Practices for Diversifying and Managing Revenue Sources, Assembly Room – 6TH floor** **Ricardo Estrada,** *President and Chief Executive Officer, Metropolitan Family Services* **Julie Hoffmann,** *Managing Director, A Better Chicago* **Danya Rosen,** *Chicago Executive Director, Peer Health Exchange* *Moderated by* **Marguerite Griffin,** *National Director, Philanthropic Services, Northern Trust*
5:00 – 6:00 PM	**Cocktail Reception, Assembly Room and Annex – 6TH floor**

NORTHERN TRUST SPEAKERS

William Barouski

Deputy Chief Information Security Officer

Bill has 35 years of industry experience. Prior to joining Northern Trust, he served as executive vice president and chief information security officer for the Federal Reserve System. In that role, Bill oversaw information security, including incident response, for the United States Central Bank, ensuring information security architecture, standards, policies and programs remained effective and efficient. He held previous roles in a number of management positions, including product manager for certain Federal Reserve financial services. As product manager, he managed the Federal Reserve's nationwide electronic payments and information delivery network, national sales and marketing strategies.

A Chartered Financial Analyst and a member of both the Investments Analysts Society of Chicago and the Information Systems Security Association of Chicago, Bill regularly contributes to industry publications, and participates in professional conferences associated with technology, information security, risk management, payments, and financial services. He received his bachelor's degree in from the University of Illinois, his M.B.A. from the University of Chicago, and a master's degree in information technology from the McCormick School of Engineering at Northwestern University.

Ophelia Barsketis

Senior Portfolio Manager

Ophelia Barsketis is a Senior Portfolio Manager on the Foundation & Institutional Advisors team. Prior to joining Northern Trust, Ophelia was most recently a portfolio manager and analyst at Great Lakes Advisors, a division of Wintrust Wealth Management. Previously she spent seven years as a managing director at Fiduciary Management Associates, LLC, where she was also a co-team leader for large cap equity strategies.

Prior to FMA she was with Duff and Phelps Investment Management, where she served as a senior vice president and equity team head. Ophelia began her career at Stein Roe and Farnham as a research assistant and rose to managing director of global equities. She has 25+ years experience and brings a global background. Ophelia offers particular expertise in values-based investing for clients interested in SRI/ESG capabilities.

Ophelia earned a BA from the University of Chicago and an MBA in international finance from the Thunderbird School of Global Management. She is involved in a variety of investment organizations and serves on several advisory boards.

NORTHERN TRUST SPEAKERS

Tim Bresnahan

Associate Director, Philanthropic Advisory Services

Tim is a vice president in the Wealth Planning Advisory Services group at Northern Trust, assisting with the delivery of Northern Trust's wealth planning services, with a focus on philanthropy, art advisory and planning for LGBT individuals. Prior to joining Northern Trust in 2010, Tim practiced law at a litigation firm in Chicago. During law school, he served as a Mayoral Fellow in the Office of Mayor Richard M. Daley and spent a semester as a judicial extern for the Honorable Samuel Der-Yeghiayan, United States District Court for the Northern District of Illinois. Prior to law school, Tim worked in the nonprofit sector, including The Nature Conservancy's Illinois Chapter and the Human Rights Campaign.

He is a past board member of the Human Rights Campaign and a current member of the board of directors for Rivendell Theatre in Chicago. Tim is also affiliated with the Chicago Community Trust's Young Professional Advisory Committee, the Donors Forum, the Chicago Council on Planned Giving and the Point Foundation. He earned a J.D. from Chicago-Kent College of Law and a bachelor's degree in Foreign Service from Georgetown University in Washington, D.C.

Jordan Dekhayser

Portfolio Manager, Global Index Management

Jordan is a senior quantitative research analyst with Northern Trust Asset Management. In this role he conducts factor-based research primarily focused on equities. He is a member of Northern Trust's cross functional ESG Council with a focus on developing and enhancing Northern Trust's ESG investing capabilities. Jordan was previously a senior portfolio manager responsible for managing a variety of institutional and retail strategies, and was lead equity ETF portfolio manager.

Prior to joining Northern Trust in 2008, Jordan worked for Deutsche Bank as a sales-trader for the global equity program trading team where he covered U.S. institutional clients trading global equities. He earned his bachelor's degree in finance from Rutgers University. He is a CFA Charterholder and has been a member of the CFA Institute and NYSSA since 2008.

NORTHERN TRUST SPEAKERS

Sally Giegerich

Senior Portfolio Manager

Sally is a senior vice president and serves as a senior portfolio manager in the Wealth Management Group, where she is responsible for the design, implementation and management of investment portfolios for high-net-worth clients. She also serves as a senior investment officer, providing compliance oversight for a team of portfolio managers. She is a member of Northern Trust's investment advisory committee.

Sally has obtained the Chartered Private Wealth Advisor® designation. She holds a bachelor's degree in finance from the University of Illinois and an M.B.A. degree in finance and marketing from DePaul University. Sally is a member of the CFA Institute, the CFA Society of Chicago, and the Investment Management Consultants Association. She is past chair of the board of directors of Joliet Catholic Academy and heads its investment committee.

Marguerite Griffin

National Director of Philanthropic Services

Marguerite is responsible for the delivery and growth of Northern Trust's philanthropic services to Wealth Management clients. She specializes in administering charitable trusts and private foundations and counsels clients regarding charitable giving and grant-making practices. Marguerite was most recently a senior trust administrator and relationship manager in the personal trust administration department where she was responsible for the administration of large, complex trusts for individuals and families, including irrevocable trusts, family limited partnerships, and charitable trusts and supporting organizations. Her duties involved working with sophisticated estate plans, sensitive family situations and complex property transfers.

Margaret received her bachelor's degree from Washington University in St. Louis, her law degree from Northwestern University School and is a Certified Trust and Financial Advisor. She is a member of the Chicago Bar Association and the Chicago Estate Planning Council and is admitted to practice before the Illinois Supreme Court. Marguerite has received recognition from Chicago United as a 2007 Business Leader of Color. She is an active volunteer, advisor and board member with several charitable and cultural institutions, including The Art Institute of Chicago, The Chicago Symphony Orchestra, The Chicago Community Trust, The Ravinia Festival and the WFMT/WTTW Planned Giving Committee and the Donors Forum.

NORTHERN TRUST SPEAKERS

Thomas E. Kirkenmeier

Senior Investment Officer, Foundation & Institutional Advisors

Tom oversees the design, implementation and ongoing supervision of client portfolios. This includes assisting clients in arriving at their strategic asset allocation, selecting specific investment vehicles suitable to meet their investment objectives, implementing investment strategies and maintaining ongoing communication with client boards and professional staff. Prior to his current role he was the senior investment officer and a senior portfolio manager in the west suburban region of Chicago and the Wealth Advisory Group in Chicago. Prior to joining Northern Trust in 1992, he spent 10 years with Brown Brothers Harriman & Co. in Chicago advising high-net-worth clients.

Tom received his bachelor's degree in finance from the University of Illinois and his M.B.A. from DePaul University. He is a CFA charterholder, a Certified Public Accountant and a Certified Financial Planner™ (CFP®). Tom is a member of the CFA Society of Chicago and the CFA Institute.

Steve "Mac" MacLellan

President and Chief Executive Officer, Wealth Management, Central Region

Mac is responsible for leading the investment management, banking and fiduciary business for Northern Trust's offices in Illinois, Ohio, Michigan, Minnesota, Wisconsin and Missouri. In addition, he is a member of the Northern Trust operating group, the Northern Trust Wealth Management executive committee and is a board member of Northern Trust Securities Inc.

Prior to his current role, Mac was the CEO and global head of business practices and client segments for Northern Trust's Wealth Management business. In that capacity, he oversaw Wealth Management's professional business practices (investment management, private banking, personal trust and advisory services) as well as Wealth Management's core client segments (Wealth Advisory, Private Client Services, and Foundations & Institutional Services). He was also responsible for the business unit's sales and marketing functions. Prior to assuming this role, Mac served as president and CEO for Northern Trust's Wealth Management business in the southwest region (Arizona, Texas and Colorado). And prior to that assignment he served as national director of Wealth Advisory Services.

NORTHERN TRUST SPEAKERS

Jim McDonald

Chief Investment Strategist

Jim is an executive vice president and the chief investment strategist for Northern Trust. In addition, he chairs the Northern Trust tactical asset allocation committee, is a member of the investment policy and private equity investment committees, and is trustee of the Northern Trust Alpha Strategies and Equity Long/Short Strategies Hedge Funds.

Prior to joining Northern Trust in 2001 as the director of equity research, Jim was director of equity research at ABN AMRO in New York and Chicago and equity research analyst at ABN AMRO following the environmental services industry. He started his professional career in 1981 with Arthur Andersen & Co. in Detroit. Jim received his bachelor's degree from the University of Michigan and an MBA with high distinction from Babson College. He is a member of the CFA® Society of Chicago and a registered CPA in the State of Michigan.

Robert Morgan

Managing Director, 50 South Capital

Robert is a senior vice president and managing director for 50 South Capital, with management responsibility for the alternative asset investments areas of 50 South Capital. He had previously been director of private equity, a position he held since co-founding the private equity funds group, and an area in which he remains heavily involved.

Prior to joining 50 South Capital, he worked as a director at Frye-Louis Capital Advisors, LLC (FLCA), a Chicago-based private equity investment manager, and was responsible for all of the operations of FLCA, including the management of a private equity fund-of-funds. Prior to joining FLCA, he worked for Heller Financial, Inc., a middle-market commercial finance company which was later acquired by General Electric. Within Heller, Robert held several roles, including positions in the corporate finance group, corporate credit and Heller Equity Capital Corporation, Heller's captive private equity fund. He has invested in more than 100 private equity funds covering the buyout, venture capital, structured high yield, real estate and international markets. While at Heller, he also oversaw a direct equity co-investment program which totaled approximately 20 investments. Prior to attending business school, he worked for a commercial bank in North Carolina. Robert is a board member for the Illinois Venture Capital Association and several fund advisory boards. He received his bachelor's degree in economics from Wake Forest University and an MBA from Emory University.

NORTHERN TRUST SPEAKERS

Kevin Novak
Chief Information Security Officer

Kevin is information security and technology risk officer at Northern Trust, and a member of the Northern Trust corporate risk group. He is responsible for the security of company and client information and for the management of information technology risks across Northern Trust's global business.

Prior to assuming the role of chief information security officer at Northern Trust, Kevin spent five years at Discover Financial managing their information security, records management and enterprise risk management programs; as chief operating officer and director of consulting services for Neohapsis, a Chicago-based information security consultancy; and as a senior technology consultant at Ciber Network Services, a global IT consulting services provider. Prior to joining Ciber Network Services, Kevin was a financial auditor and tax accountant for Best Travel and Tours, and Ameritech Credit.

Raymond C. Odom, JD, CFP
National Director of Wealth Transfer Services

Ray Odom is the National Director of Wealth Transfer Services in Northern Trust's Wealth Management group and serves as a national subject matter specialist in wealth transfer planning and fiduciary product solutions. Ray works with regional wealth advisory teams and wealth strategists to provide valuable planning ideas to clients, prospects and their advisers. He is an acclaimed noted speaker on wealth planning and asset protection topics.

Prior to his current role, Ray served in the dual capacity of Trust Administrator and Wealth Strategist, where he was responsible for the administration of large, complex trusts for individuals and families. His duties often involved working with sophisticated estate plans, sensitive family situations, and complex property transfers. Ray began his career with Northern Trust in June, 1980. Ray worked as tax counsel with special expertise in tax exempt organizations, fiduciary income tax, and estate and gift tax before leaving for private law practice in 1990.

From 1990-1994, Ray was a partner in the Chicago law firm of Hoogendoorn & Talbot, Davids, Godfrey & Milligan where he assisted high net worth clients with business succession planning, the drafting of trust and wills, charitable gift planning, trust litigation, corporate transactions, and probate practice during his time in private law practice. Prior to rejoining Northern Trust in December of 2000, Ray was a Vice President with NBD Bank (now known as JP Morgan Chase) where he served as a Relationship Manager trust officer and as local trust counsel.

Ray has a B.A. from Valparaiso University and a J.D. from The Ohio State - Moritz College of Law. He has previously served as a series 7 registered representative holding a series 7 and 66 license and is currently also an attorney licensed to practice law in Illinois and before the U.S. Tax Court. In addition, Ray is a Certified Financial Planner (registered trademark) (CFP) and formerly taught as an adjunct professor in the MBA program of Benedictine University. He is a current member of the Chicago Estate Planning Council and the American Bar Association.

NORTHERN TRUST SPEAKERS

Alexis Sutton

Senior Program Officer

Alexis is vice president and senior program officer in community affairs at Northern Trust. In this role she helps drive a global charitable strategy, including management of the strategic philanthropy program, oversight for the annual United Way campaign, participation on the Northern Trust charitable trust committee, and responsibility for all related communications and reporting. Alexis joined Northern Trust in 2006 as a public relations specialist supporting the company's institutional businesses. In 2008 she joined the New York office, serving as marketing director for wealth management in the northeast region and leading special projects including Northern Trust's expansion into Washington, D.C.

Alexis received her bachelor's degree in psychology from the University of Virginia where she was captain of the Division I Women's Volleyball Team. She sits on the auxiliary board of the John G. Shedd Aquarium and co-chaired their 2015 BLU event, raising a record $415,000 for the organization. She is a member of the nominating committee for the Association of Fundraising Professionals Chicago Chapter, United Way of Metropolitan Chicago's Young Leaders Society, YPO NextGen and volunteers with the Young Women's Leadership Charter School. In 2013, Alexis was listed among the next generation of philanthropists by Crain's Chicago Business.

Carl Tannenbaum

Chief Economist

Prior to joining Northern Trust, Carl led a team at the Federal Reserve Bank of Chicago whose charter was to analyze financial risk, its implication for the broad economy and policy choices to address it. He served as the head of the entire Federal Reserve System's risk group in Washington, working closely with Federal Reserve System Governors and senior officials.

Carl received a bachelor's degree in finance and economics and an M.B.A. from the University of Chicago. He is a past chairman of the Conference of Business Economists and also a past president of the National Association for Business Economics, the North American Asset/Liability Management Association and the Bank Administration Institute's Treasury Commission.

EXTERNAL SPEAKERS

Jason Baxendale, MBA, JD

Senior Director of Planned Giving, Chicago Community Trust

Jason is the senior director of gift planning for The Chicago Community Trust. He is responsible for a broad range of matters including charitable contributions, donor advised funds, supporting organizations, agency endowments and other legal, tax and investment aspects of charitable giving and foundations. He also serves as co-director for the We Are Chicago Campaign which, in honor of the 100TH anniversary of The Chicago Community Trust, has raised more than $1.4 billion.

Jason is a member of the Partnership for Philanthropic Planning, the Chicago Council on Planned Giving, the Chicago Estate Planning Council and the Association of Fundraising Professionals. He earned his bachelor's degree in political science from Kansas State University, an M.B.A. from the University of Missouri-Kansas City and a J.D. degree from Washburn University School of Law.

Lisa Morrison Butler

Commissioner of the Department of Family & Support Services, City of Chicago

Lisa was appointed commissioner of the Chicago Department of Family and Support Services (DFSS) in July 2015 by Mayor Rahm Emanuel. At DFSS, she directs the city department responsible for delivering social service programs and resources to Chicago's residents, particularly those most in need, from birth through the senior years. Through its community service centers, senior centers and a network of more than 300 delegate agencies, DFSS provides a broad range of services and resources that assist over 300,000 Chicago residents each year; from early childhood education to reducing homelessness, to aiding victims of domestic violence, to providing workforce opportunities for the formerly incarcerated, to serving our city's senior population.

Prior to joining the city, Lisa most recently served as executive director for City Year Chicago, a national youth service corps which partners with at-risk schools to help students reach their full potential. During her tenure, Morrison Butler grew City Year Chicago from 60 to more than 200 members serving annually, and increased by ten-fold the number of at-risk Chicago Public School students that City Year Chicago served. Additionally, she has held senior positions in the telecommunications industry and established a private strategic communications practice. Lisa holds a bachelor's degree from Indiana University and pursued post-graduate studies at the J.L. Kellogg Graduate School of Management, Northwestern University and the University of Chicago.

EXTERNAL SPEAKERS

Ricardo Estrada

President and Chief Executive Officer, Metropolitan Family Services

Ric was named president and CEO of Metropolitan Family Services in 2011. During his tenure he has led the expansion of Metropolitan's client base by 20,000, and grown the agency's budget from $32 million to $50 million. Most recently he secured funding for an early childhood facility on Chicago's Southwest Side. Prior to joining Metropolitan, Ric served as first deputy commissioner of the City of Chicago's Department of Family and Support Services. Before that he served as executive director of Erie Neighborhood House in Chicago, where he created Erie Elementary Charter School.

His civic and community involvement includes the University of Illinois Board of Trustees; board of directors of Leadership Greater Chicago; and board member of the Woods Fund of Chicago. Awards include Leadership Greater Chicago 2013 Distinguished Fellow, American Marshall Memorial Fellow, Loyola University Chicago Latino Alumnus of the Year, City Club of Chicago John A. McDermott Award for Distinguished Social Leadership, the Citibank Hispanic Heritage Award, an NFL Hispanic Heritage Award from the Chicago Bears, and Person of the Year by the Corporate Responsibility Group of Greater Chicago. Ric holds an M.B.A. from the University of Illinois at Chicago, a master's degree in policy and administration from the University of Chicago, and a bachelor's degree in psychology from Loyola University of Chicago.

Katherine Groninger, PhD

Philanthropic Advisor, Major Gifts, Art Institute of Chicago

Dr. Groninger currently serves as philanthropic advisor at the Art Institute of Chicago. Her nonprofit arts career has spanned continents and organizations, working for museums ranging from the Solomon R. Guggenheim Museum to the Scottish Fisheries Museum. Recently, she helped manage the Detroit Institute of Arts' response to the municipal bankruptcy, termed the "Grand Bargain," safeguarding the museum collection from sale, and the museum from closure.

Specializing in British and American museum ethics and accountability, Kate received her doctorate from the University of St Andrews, Scotland. She holds degrees in art history from Princeton University and in arts administration from New York University. Kate has spoken at international conferences and published in international museum journals on topics including deaccessioning policies, professionalizing the museum industry, and stimulating ethical and financial transparency in museums.

EXTERNAL SPEAKERS

Julie Hoffmann

Managing Director, A Better Chicago

Julie joined A Better Chicago in 2012 and leads the organization's development efforts. A venture philanthropy fund for the Chicagoland area, A Better Chicago's goal is to transform education by transforming philanthropy. As head of development and a member of the organization's leadership team, Julie has significantly grown A Better Chicago's donor base and helped to launch the organization's ambitious strategic plan to significantly increase college graduation rates for low-income Chicagoans.

Previously, Julie was the Director of Development and Communications for The Cara Program, one of Chicago's leading workforce development organizations. In this role, Julie significantly grew Cara's private funding and built the organization's development office. Earlier in her career, Julie served as a consultant for Volunteers for Economic Growth Alliance and as a community health volunteer in Peru through the United States Peace Corps. Julie earned her bachelor's degree in sociology and Spanish from Vanderbilt University and an M.B.A. in international management from the Thunderbird School of Global Management. Julie is also proud to participate in the Class of 2015 of The Allstate Foundation's Greater Good Nonprofit Leaders Program.

Dorri McWhorter

Chief Executive Officer, YWCA Metropolitan Chicago

Dorri became the CEO of the YWCA Metropolitan Chicago in March 2013. She has embarked upon a journey to transform the 138-year-old social service agency to a 21ST century social enterprise. Dorri is moving the agency into the digital age by re-launching the TechGYRLS program, which focuses on developing STEM awareness for girls ages 9 through 14 and introducing Creating IL Talent, which provides web and mobile application development training to adult women. In the Spring of 2015, the YWCA launched its own e-commerce site, called the YShop, which will provide carefully curated goods and services from businesses that support the mission of the YWCA.

A proven leader in the corporate and social change sectors, Dorri prides herself on being a socially-conscious business leader throughout her career. She is an active member of Chicago's civic, business and philanthropic communities. Most recently, she was a partner at Crowe Horwath LLP, one of the largest accounting firms in the United States. She has also held senior positions with Snap-on Incorporated and Booz Allen Hamilton. Dorri is also active in the accounting profession as a member of the board of directors of the American Institute of Certified Public Accountants. She also serves on the board of directors for several organizations, including Chicago Finance Exchange, Chicago Child Care Society and Search Inc. Dorri is also a member of the Executive Council of Ms. Tech advancing women businesses in technology. She received her bachelor's degree in business administration from the University of Wisconsin-Madison and her master's degree in business administration from Northwestern University's Kellogg School of Management.

EXTERNAL SPEAKERS

Duane Roberts, CFA

Director of Equities, Dana Investment Advisors

Duane joined Dana Investment Advisors in 1999 and is currently director of equities and an equity portfolio manager. He graduated from Rice University with a bachelor's degree in electrical engineering and mathematics. He earned his master's degree in statistics from Stanford University and an M.B.A. in finance from Southern Methodist University. Duane is a Chartered Financial Analyst and a member of the CFA Institute and the CFA Society of Dallas-Fort Worth.

Danya Rosen

Chicago Executive Director, Peer Health Exchange

Danya has nearly a decade of experience in nonprofit management across both the direct service and advocacy sectors. She joined Peer Health Exchange (PHE) in 2010. As the Chicago executive director, Danya is primarily responsible for the development, management, growth and evaluation of the PHE Chicago program, raising funds, managing and growing the Chicago Board of Overseers, and providing fiscal and organizational oversight for PHE Chicago. Danya previously served as PHE's senior director of development in San Francisco, California.

Prior to joining PHE, Danya spent five years at Peace Action West (PAW) as the deputy outreach director, where she was responsible for overseeing California-based programming. While at PAW, she lobbied for disarmament and nuclear non-proliferation with the Alliance for Nuclear Accountability's DC Days, and managed the GOTV efforts for the 2006 CA-11 race through Peace Action West's political action committee. Danya graduated from UC Berkeley with a bachelor's degree in sociology. She is a member of the Jewish Council on Urban Affairs' JCore, the Chicago Foundation for Women's LBTQ Giving Council, and the Chicago Department of Public Health's adolescent health access committee.

EXTERNAL SPEAKERS

Braden Waverley

Member of Investment Committee, DuPage Community Foundation
General Manager, ABW Holdings LLC

Braden is the General Manager of ABW Holdings, LLC, an investment and consulting firm he founded in 2005. He has more than 20 years of experience managing global organizations, ranging from early stage technology ventures to some of the world's largest and fastest growing companies. Having lived and worked in multiple countries, he has held P&L responsibility for businesses in 15 markets on three continents. Braden has successfully partnered with private equity and venture capital firms to create value through a range of transactions, including growth capital investments, divestitures and acquisitions.

In addition to leading multiple private equity and venture-backed companies, Braden served as interim CFO of Federal Signal Corporation and vice president and general manager of multiple business units at Dell, Inc. Early in his career, Braden held multiple operations and marketing management positions with Motorola, Inc. He holds a bachelor's degree from the University of Wisconsin at Madison and an M.B.A. from the J.L. Kellogg Graduate School of Management at Northwestern University. An active member of the local nonprofit community, he has been a trustee of The Community House in Hinsdale, Illinois since 2008 and currently chairs its investment committee. He has been a member of the investment committee at the DuPage Community Foundation since 2012 and became a board member of the District 181 Foundation during 2015.

Eric Weinheimer

President and Chief Executive Officer, Donor's Forum

Since July 1, 2014, Eric has been the president and CEO of Donors Forum, the only regional association in the United States that represents grantmakers and nonprofits, as well as their advisors. In addition to its 1,100 members, Donors Forum is actively engaging social entrepreneurs, impact investors and B-Corps into its work to expand membership and spur innovation in the sector. Donors Forum provides education, capacity building, advocacy, peer networking and project management services for the social impact sector. Prior, Eric was President and CEO of The Cara Program, a non-profit organization that provides comprehensive training, job placement and support services to individuals who are homeless and struggling in poverty.

Eric earned a bachelor's degree from Boston College and an M.B.A. from The University of Chicago Booth School of Business, where he was awarded the Distinguished Alumni Award for Public Service. Eric was selected as a member of the Emerging Leaders Program for the Chicago Council on Global Affairs, Class of 2011. Eric was also selected as a Chicago Community Trust Fellow for 2013. He serves on the advisory board for the Social Enterprise Initiative at The University of Chicago Booth School of Business. He also serves on the board of directors for the Oak Park River Forest Community Foundation.

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