

Meet the Experts 2020

All experts for both events, listed in alphabetical order

Pedro Arista

September 23 @ Table 6

pedro@hirschassoc.com

Topics: (1) Private & public partnerships, (2) Community engagement for impact

[Hirsch & Associates Philanthropic Advisers](#) works with individuals, families, and foundations to craft and implement giving opportunities that actively create an equitable and uplifting world.

Betsy Brill

September 23 @ Table 14

Betsy@stratphilanthropy.com

Topics: (1) Foundation management, (2) Next generation transitions and family philanthropy, and (3) planning (starting up and refining strategies, structure and processes)

[Strategic Philanthropy, Ltd.](#) is a global philanthropic advisory firm headquartered in Chicago. Since 2000, the firm has been at the forefront of helping individuals, families, closely held and family-owned businesses plan, assess and manage their charitable giving. With our team of full-time professionals and associates, we offer a customized suite of services that focus on donor intent and positive impact.

Grant Elliott

September 16 @ Table 7

September 23 @ Table 7

grant.elliott@foundant.com

Topics: (1) [What grantmakers are doing to respond to COVID-19](#), (2) [Simplifying your grant application workflow](#), and (3) [Working with your grantee's to maximize impact](#)

[Foundant Technologies](#) provides intuitive, integrated solutions to help maximize the impact of the philanthropic community. Through a company-wide dedication to honest, lasting relationships Foundant strives to ensure client success above all else.

Stephanie Ellis-Smith

September 23 @ Table 9

stephanie@philagiving.com

Topics: (1) Multi-gen family philanthropy, (2) Social justice philanthropy, (3) Participatory grant making

[Phila Engaged Giving](#) is a values-driven philanthropic advisory firm that works exclusively with donors interested in leaving a philanthropic legacy.

Alexis Fish

September 16 @ Table 3

September 23 @ Table 3

David.Hazeltine@blackbaud.com

Topics: (1) Grantmaking best practices, (2) Impact management, (3) Applicant stewardship

[Blackbaud](#) is committed to providing foundations with powerful solutions for grants management and financial accounting. Learn more about how we can help you maximize impact.

Dan George

September 16 @ Table 8

September 23 @ Table 4

Dan.George@ellwoodassociates.com

Topics: (1) Building an investment portfolio with a focus on minority-owned investment firms, (2) Opportunistic investing in a pandemic-driven sell off, (3) Balancing the investment equation: spending, inflation and investment returns in an uncertain environment.

At [Ellwood Associates](#), we have been guiding foundations and nonprofits for more than 40 years in their quest to balance the foundation equation: meeting investment objectives with an appropriate asset allocation.

Jeff Glebocki

September 23 @ Table 15

jmmg01@comcast.net

Topics: (1) Planning (start-up, refining, spend-down), (2) Evaluation, (3) Leadership succession

Strategy + Action: As advisor and past foundation executive, I help funders become catalysts for change in communities and causes they serve. Planning, evaluation, organizational development, board and staff executive coaching, facilitation.

Justin Goldbach

September 23 @ Table 12

justin@socialstrategyassociates.com

Topics: (1) Designing and running philanthropic prizes, competitions, and fellowships, (2) Managing co-funding initiatives, (3) Organizing impactful convenings

[Social Strategy Associates](#) is an inspired consultancy, passionate about the power of philanthropy and business to positively impact our world's most pressing social and environmental issues.

Pegine Grayson

September 16 @ Table 17

PGrayson@whittiertrust.com

Topics: (1) Customized foundation administration services (outsourced office and staff functions), (2) Philanthropic consulting (grantmaking, succession planning, next gen involvement, etc.), (3) Investment management services

As the oldest and largest multifamily office headquartered in the west, [Whittier Trust](#) has been providing comprehensive foundation administration, philanthropic consulting and investment management for our high net worth clients for over six decades.

Suzanne Hammer

September 23 @ Table 5

suzanne@suzannehammer.com

Topics: (1) Board and family dynamics, (2) Next generation engagement and leadership transitions, (3) Grant strategy and forging meaningful partnerships with community

At [Hammer & Associates](#) our goal is to help you pair your philanthropic passion with a meaningful strategy through a bespoke menu of services.

Erich Hickey

September 16 @ Table 6

ehickey@drexelmorgancapital.com

Topics: (1) Investment policy statements, (2) Asset allocation, (3) Alternative investments

[Drexel Morgan Capital Advisers](#) is a 40 year old wealth management firm located in Radnor, PA. Our goal is to maximize the long-term value of your institution and promote your core values through careful stewardship of your investment portfolio and establishing a deep relationship with staff and board members through communication and education.

Heather Hiscox

September 16 @ Table 12

heather@pauseforchange.com

Topics: (1) Innovation, (2) Stage gate philanthropy, and (3) Efficient and effective problem-solving.

At [Pause for Change](#) we help nonprofit, philanthropic, and local government organizations address challenges in less time, with fewer resources, to achieve greater impact.

Michelle Hoexum

September 23 @ Table 11

mhoexum@revalueinvesting.com

Topics: (1) Direct community capital investing, (2) Values aligned investing and philanthropic mission, (3) Socio-economic barriers to creating and building wealth

[Revalue](#): Financial navigators, connecting people to purpose by crafting values-aligned financial plans, investment portfolios, and educational programming in partnership with direct community capital deployment. Redefining wealth, for good.

Amy Holdsman

September 16 @ Table 9

amy@essentialleadership.us

Topics: (1) Clarifying your why: creating your mission, vision, values, (2) Navigating difficult conversations: working with family dynamics, (3) Setting the foundation for your foundation.

[Essential Leadership](#) energizes family philanthropy, working together to crystalize values, magnify voices, and create a vision for how to engage and positively impact the world.

Brian Joseph

September 16 @ Table 15

bjoseph@reviengroup.com

Topics: (1) Peer groups for nonprofit leaders - building community & social capital, (2) Nonprofit revenue capacity – treating root causes vs. symptoms of revenue challenges, (3) Engaging Nonprofit Boards in Productive Revenue Dialog.

[RevJen Group](#) is a social enterprise dedicated to the empowerment of nonprofit leaders and the missions they serve.

Manisha Kathuria

September 23 @ Table 8

Manisha.Kathuria@nb.com

[Neuberger Berman](#) is an independent, employee-owned investment manager which manages a range of strategies—including equity, fixed income, quantitative and multi-asset class, private equity, real estate and hedge funds—on behalf of institutions, advisors and individual investors globally.

Peter Klein

September 16 @ Table 2

September 23 @ Table 2

pklein@alinewealth.com

Topics: (1) Investment management & strategy, (2) Investment policy statement reviews, (3) Socially responsible investing themes.

[ALINE Wealth](#) is focused on delivering comprehensive solutions for the future and legacy of our clients, including family foundations and endowments. These solutions are steeped in optimized portfolio management and a resolute understanding of our clients' objectives and risk constraints to deliver honest, client-focused intelligence, where clients come first. And second. And third.

Sonia Kowal

September 23 @ Table 16

sonia@zevin.com

Topics: (1) Impact investing, (2) Reducing risk in investments, (3) Investment policy statements

[Zevin Asset Management](#) is a boutique wealth advisor that helps foundations across the country grow their assets while seeking a healthy planet and an equitable society.

Lindalee Lawrence

September 16 @ Table 11

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Topics: (1) Are trustee/director, leadership and staff compensation competitive in the marketplace? How to hire, retain and motivate great staff? (2) Have leadership transitions, changing roles, responsibilities and workloads raised thorny issues around compensation? (3) Foundations are covered by rules around self-dealing and reasonable compensation. A best practice is compliance with IRS Intermediate Sanctions. Does your board know where they stand?

[Lawrence Associates](#) is a national compensation consulting firm assisting trustees and foundation management, covering all aspects of compensation to executives, trustees and staff, surveys, market analysis.

Brad Norton

September 16 @ Table 18

brad@winfieldinc.com

Topics: (1) Behavioral finance (including importance of disciplined asset allocation approach), (2) Why now is a good time for founders to write or revisit foundation legacy statements

[Winfield Associates](#) is an independent investment management firm helping foundation trustees and investment committees fulfill their fiduciary responsibilities associated with managing an investment portfolio.

Mary Phillips

September 16 @ Table 10

mphillips@gmafoundations.com

Topics: (1) Governance, (2) Transition planning, (3) Program design

[GMA Foundations](#), helps donors define and reach their philanthropic goals. We provide a full range of services, from strategic consulting and board retreats to grantmaking, bookkeeping, and foundation management.

Leslie Pine

September 16 @ Table 16

Contact Jennifer: JMontone@tpi.org

Topics: (1) Defining your philanthropic goals and developing a powerful strategy to achieve those goals, (2) Design, implementation, and evaluation of philanthropic strategies and initiatives; (3) Succession planning, next generation involvement, and other family philanthropy issues

[The Philanthropic Initiative](#) (TPI) is a global philanthropic consulting practice that designs transformative, strategic solutions to help individuals, families, foundations, and corporations increase the impact of their philanthropy.

Kris Putnam-Walkerly

September 16 @ Table 14

kris@putnam-consulting.com

Topics: (1) How to create a plan you can count on in a constantly changing world, (2) The top 3 mistakes most lean funders make (and how to avoid them), (3) How to maintain the new best practices you adopted while responding to COVID-19 long after the crisis is over

[Putnam Consulting Group](#) is a global philanthropy consultancy helping donors, foundation leaders, and family offices increase the clarity, impact, and joy in their giving.

Bruce Raabe

September 23 @ Table 10

bruce@relevantwealth.com

[Relevant Wealth Advisors](#), with over five decades of experience acting as fiduciaries on behalf of our foundation clients (as an OCIO), has developed a unique level of engagement with our

foundation boards. This ensures their chosen mission and vision are protected by a comprehensive and collaborative investment management process.

Huldah Robertson

September 16 @ Table 1

September 23 @ Table 1

Huldah.Robertson@Glenmede.com

Topics: (1) Adjusting your investment policy and grant making distributions in the wake of the pandemic, (2) Racial equity investing, and other mission-aligned investing strategies, (3) Next generation philanthropy and family education

[Glenmede Endowment & Foundation Management](#), an Outsourced Chief Investment Officer (OCIO), is responsible for successfully and prudently stewarding over \$8.5 billion for foundations and nonprofit organizations. Glenmede clients benefit from the access and experience gained through more than sixty years of providing sophisticated endowment-style management, philanthropic advisory services, and sustainable and impact investing expertise.

Terri Steffner

September 16 @ Table 5

Terri.Steffner@RaymondJames.com

[DH Consulting Group](#)

Mike Wang

September 16 @ Table 4

mike.wang@buildingimpact.co

Topics: (1) Changing public perception and the policy environment to move from incremental to sweeping change, (2) How to use scenario planning as a tool to have impact, even amidst extraordinary uncertainty, (3) Re-imagining your approach to be more fully grounded in equity

At [Building Impact](#), we help you engage effectively with the pressing social issues most important to you and your community. We work together to devise strategies that uniquely leverage your capacity, time, and resources. And we work alongside you to implement for impact.

TBD- TD Charitable Foundation Representative

September 16 @ Table 13

September 23 @ Table 13