IPA/GIFT Program/Mission Related Investments Deep Dive Day

Wednesday, March 9, 2016
West Market Conference Center (ISTA Building)
150 W. Market St., Indianapolis, IN

Speaker/Panelist Bios

Jennifer Danic, President and CEO, Steuben County Community Foundation

Jennifer graduated with a Bachelor of Arts degree in French and Business Administration. Under the advisement of a mentor, she then attended the Center on Philanthropy at Indiana University where she obtained a Master of Arts degree in Philanthropic Studies. She also holds many certifications: a Certificate in Nonprofit Management from the School of Public and Environmental Affairs, Indiana-Purdue University Indianapolis, and a Certificate in Fundraising Management from The Fundraising School at Indiana University. Jennifer previously worked for Goodwill Industries Foundation of Central Indiana.

Steven A. Gilliand, President & CEO, Harrison County Community Foundation

Steve is President and CEO of the Harrison County Community Foundation and was hired as its first Executive Director in March 1999. He oversees a staff of five who work in grants, scholarships, finance, fundraising, and marketing. He graduated from English High School in May 1973. Steve retired as a Master Chief Submarine Sonar Technician and Acoustic Intelligence Specialist after a twenty-year career in the US Navy (submarine service). He held assignments in Connecticut, Key West, San Diego, Pearl Harbor, and Washington, DC.

Steve became the founding Executive Director of the Crawford County Youth Service Bureau and Alternative School in Marengo, Indiana in December 1993. He served on the Indiana Youth Services Association Board of Directors from 1999-2001, the latter year as president. In 1998, he was on the steering committee and then a founding board member of the Community Foundation of Crawford County. He also served on the Indiana Grantmakers Alliance board of directors and is currently serving on their Public Policy Committee.

Sunjay Goel, CFA, MBA, Professional Investment Management, Halter Ferguson Financial

Sunjay Goel is a portfolio manager with the Investment Management Team at Halter Ferguson Financial, Inc. where he is the lead manager of the Indiana Small Cap portfolio. Sunjay graduated with a Bachelor of Science in Computer and Electrical Engineering (Honors) from Purdue University and a Masters of Business Administration in Finance (Honors) from Indiana University and is a Chartered Financial Analyst™ charterholder. He has approximately 10 years of institutional experience researching and investing in the Technology, Telecom, Utilities, Materials, Industrials and Energy sectors.

Sunjay has also served as the co-manager of the Wells Fargo Advantage Enterprise mutual fund and is a board member of the CFA Society of Indianapolis. He is a member of the Hindu Temple of Central Indiana. Sunjay is fluent in Hindi and travels to India often.

Rich Haddad, President & CEO, K21 Health Foundation

Rich oversees all aspects of K21's operations and is responsible for all financial reporting to the Board and working directly with independent accountants on auditing and tax issues. He also has a background in investment and financial planning, which helps in his responsibilities of overseeing the outside investment relationships hired to invest the foundation's funds prudently, both day to day, and with the Investment and Finance Committee of the Board.

Rich is a graduate of Grace College in Business and Accounting. He began his career in Indianapolis working at KPMG as a CPA, and then spent several years at Duke Realty before moving back to Kosciusko County in 1992. Prior to K21 he led a Financial, Investment and Retirement Planning company as well as served as an Executive Director of a large non-denominational church, both in Warsaw, Indiana.

Gary W. Jbara, CIMA, Executive Director, Financial Advisor and Senior Institutional Consultant, Jbara and Rogers Financial Management Group at Morgan Stanley

Gary has worked in the investment and financial consulting industry since 1985. He serves as a lead consultant and oversees strategic portfolio construction, asset allocation strategy, investment policy analysis, market research and day-to-day investment management responsibilities for client portfolios. As Senior Institutional Consultant, Gary provides comprehensive resources for institutional investors through Consulting Group. In addition to asset management, Gary conducts committee and board member educational workshops and provides assistance with donor recruitment and education. He earned the IMCA Certified Investment Management AnalystSM (C.I.M.A.) designation from Wharton School of Business, University of Pennsylvania.

He is a member of Investment Management Consultants Association (IMCA) and a member of the Association of Professional Investment Consultants (APIC.) Gary received a Bachelor of Science degree in Mathematics and Business from the University of Notre Dame and an MBA from the University of Michigan.

Heidi Ludwig, Associate Director, Community Foundation of Greater Fort Wayne

Heidi Ludwig is the Associate Director for Community Foundation of Greater Fort Wayne. As Associate Director, Heidi oversees administration and finance activities for the Community Foundation, serving as staff support to the audit, investment, personnel and technology committees and providing supporting resource material for committee and board members to make informed decisions. Heidi also plays an active role in management of the Community Foundation, assisting in the planning, execution and evaluation of both strategic and ongoing operations. Heidi joined the Community Foundation in 1998 and holds a B.S. in management from Ball State University.

Rachel McIntosh, Vice President, Community Development Advisor, PNC

Rachel McIntosh has over twenty years of experience in the nonprofit sector. She currently serves as Vice President and Community Development Advisor for PNC Bank. In that capacity, Rachel oversees PNC's community-based loan and investment portfolio in Indiana. Prior to that, she served as Senior Program Officer with the Indianapolis office of Local Initiatives Support Corporation. At LISC, she worked to advance a broad range of community revitalization efforts, managing investments in targeted neighborhoods.

In addition to her time with LISC, She served as a program officer for the Annie E. Casey Foundation where she helped manage the design, implementation and evaluation of grants, social investments and technical assistance engagements in the foundation's signature place-based initiatives spanning the United States and Latin America. Rachel has a Master of Arts in Philanthropic Studies and a Master's in Public Affairs with a concentration in Nonprofit Management from Indiana University.

Christine Meek, Director of Programs, Community Foundation of Greater Fort Wayne

Christine Meek is the director of programs at the Community Foundation of Greater Fort Wayne. She oversees the operations of the Program area, including scholarships and grantmaking from unrestricted, donor advised, designated, agency endowment, and field of interest funds. She works extensively with both grantseeking organizations as well as donors, providing grant evaluations and financial reviews. She also assists in the management of the Community Foundation.

Ms. Meek graduated from Indiana University in 1991 with a degree in English and Communications Media. Prior to joining the Community Foundation in 2003, she was an Associate Director at KPMG LLP where she managed a tax marketing research group and was a national database administrator and trainer.

Joel Moore, Financial Advisor, Impact Investing Specialist, Merrill Lynch Global Wealth Management

Joel is a financial advisor based in Chicago, Illinois. He provides investment consulting service to institutions and families. His other areas of focus include impact investing strategies, client education, thought leadership and impact investment guidance. Joel was recently appointed as one of twelve financial advisors in the nation to the Merrill Lynch Impact Investing Advisory Council. He joined Merrill Lynch in February 2015, after 12 years with Morgan Stanley. His experience includes assisting clients with investment and spending policies, asset allocation, manager research, donor education, donor development and overall relationship management.

Joel graduated from Rockford University in 2000 with a Bachelor's of Science degree. He holds the Series 7, 63, 65 and 31 FINRA registrations. Joel serves on the Rockford University Board of Trustees and Committees for Investment, Human Resources, Development and Enrollment Management. He has volunteered on various committees with Donors Forum Illinois, Indiana Philanthropy Alliance, Council of Michigan Foundations and the Sustainable Local Food Investment Group.

John G. Rogers, Financial Advisor, Jbara and Rogers Financial Management Group at Morgan Stanley

John G. Rogers, Financial Advisor, serves as relationship manager for the Jbara and Rogers Financial Management Group's nonprofit, corporate and individual clients. As a member of Morgan Stanley's Investing with Impact Champion's Board, he leads the Group's mission and impact investing initiatives. John assists individual clients with establishing a private foundation or a donor advised fund. He helps nonprofit clients establish and implement Morgan Stanley's White Label Donor Advised Fund Platform.

John graduated from Northwestern University in 2012 with a Bachelor of Arts Degree in History, a minor in Business Institutions and a Certificate in Leadership. He spent a year as a product specialist at Morgan Stanley's Consulting Group national headquarters in Wilmington, Delaware. John currently lives in Detroit and sits on the Youth Advisory Council for the Children's Leukemia Foundation of Michigan.