how we invest in women who invest in the world
Dear Students and Sponsors,

Thank you for your participation in the 2014 Cornell Women in Investing Conference. This year will mark the fifth anniversary of the founding of the conference. The conference was founded with a dual objective of educating MBA women about career opportunities in investment management and facilitating their recruiting opportunities through mentorship and networking. We are pleased to report that the conference is fulfilling both objectives. Our sponsors have identified, interviewed, and hired talent from the conference and a few of these WIN alumni are returning to participate as sponsoring representatives or mentors this year.

In 2014, 10 top MBA programs and 10 top tier investment management firms will be participating in the conference. As always, we are grateful for the support of the sponsoring firms listed below and look forward to another great event!

Sincerely,

Lakshmi Bhojraj ’95, MBA ’01
Founder, WIN Conference
Breazzano Family Executive Director, Parker Center for Investment Research
Samuel Curtis Johnson Graduate School of Management

Platinum Sponsors

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WIN 2014 Student Leader Committee
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Ada Chan, MBA ’15
Divya Jha, MBA ’15
Eliza Buddenhagen, MBA ’16
Lee Anne Hagel, MBA ’16
Anna Kolobkova, MBA ’16
Amy Wang, MBA ’16

#CornellWIN14
Follow the conversation on Twitter, post your images to Instagram or Facebook, watch the Seen feed at bit.ly/CornellWin14
THURSDAY, NOVEMBER 20
5:30 p.m.-6:30 p.m. – Networking Reception
6:30 p.m.- 8:30 p.m. - Dinner
   Keynote Speaker: Melissa Reilly, CIO, Equity Group, Fidelity Investments

FRIDAY, NOVEMBER 21
7:00 a.m. - 7:45 a.m. – Breakfast

7:50 a.m. - 9:42 a.m. – Stock Pitch Showcase

Track 1 (Teams 1-5)
Team 1: NYU/Stern  7:50 a.m – 8:10 a.m
Team 2: Yale  8:13 a.m – 8:33 a.m.
Team 3: Dartmouth/Tuck  8:36 a.m – 8:56 a.m.
Team 4: Virginia/Darden  8:59 a.m – 9:19 a.m.
Team 5: Chicago/Booth  9:22 a.m – 9:42 a.m.

Judges for Track 1
Kate Lakin, Assistant Director of Research, Putnam Investments
Melissa Otto, Director and Equity Research Analyst, TIAA-CREF Asset Management
Brooks Taylor, Equity Portfolio Manager, MFS Investment Management
Rich Thompson, Managing Director of Research, Fidelity Investments
Eric Veiel, V.P. and Director of Equity Research, T. Rowe Price
Diana Wagner, Equity Investment Analyst, Capital Group

Track 2 (Teams 6-11)
Team 6: MIT/Sloan  7:50 a.m. – 8:10 a.m.
Team 7: UPenn/Wharton  8:13 a.m – 8:33 a.m.
Team 8: Cornell/Johnson  8:36 a.m – 8:56 a.m.
Team 9: Columbia  8:59 a.m – 9:19 a.m.
Team 10: London Business School  9:22 a.m – 9:42 a.m.

Judges for Track 2
Catherine Arnold, Global Industry Analyst, Wellington Management Company
Noriko Honda Chen, Equity Portfolio Manager, Capital Group
Aaron Cooper, Director of Global Equity Research, Putnam Investments
Charles Hebard, Managing Director of Research, Fidelity Investments
Nicole Zatlyn, Equity Portfolio Manager, MFS Investment Management

9:42 a.m. - 9:55 a.m. - General Feedback Session

10:00 a.m. - 12:10 p.m. – Round-Robin Speed Networking Session

12:15 p.m. - 1:15 p.m. – Capital Group Luncheon Panel

What it Takes to Succeed in an Investment Management Career
Noriko Chen, Equity Investment Analyst, Capital Group
Cheryl Frank, Equity Investment Analyst, Capital Group
Natasha Mounier, Equity Investment Analyst, Capital Group
Diana Wagner, Equity Investment Analyst, Capital Group
1:25 p.m. - 2:25 p.m. – Concurrent Sessions 1

**Concurrent Session A:** Investment Strategy in the Current Economic Environment  
Seaport BC

Jackie Cavanaugh, Analyst, Equity Research, Putnam Investments
Cheryl Frank, Equity Investment Analyst, Capital Group
Lindsay Politi, Vice President and Fixed Income Portfolio Manager, Wellington Management Company
Melody Rollins, EVP, head of U.S. Institutional Client Management, PIMCO
Moderator: Tom Sprague ’79, private investor, retired PM, Fidelity Investments

**Concurrent Session B:** How I Generate Investment Ideas  
Seaport A

Sarah Ketterer, Portfolio Manager, CEO, Causeway Capital Management
Elizabeth (Beth) MacLean, Executive Vice President, Bank Loan Portfolio Manager, PIMCO
Heather McPherson, Vice President and Associate Portfolio Manager, T. Rowe Price
Natasha Mounier, Equity Investment Analyst, Capital Group
Jean Park, Portfolio Manager, Fidelity Investments
Moderator: Pamela Hegarty, MBA ’92, Boston Common Asset Management

2:35 p.m. - 3:35 p.m. – Concurrent Sessions 2

**Concurrent Session A:** How to Initiate Coverage on a Company/How to Interview Management  
Seaport BC

Cheryl Frank, Equity Investment Analyst, Capital Group
Nataliya Kofman, Equity Research Analyst, Wellington Management Company
Morgen Peck, Domestic Portfolio Manager, Fidelity Investments
Moderator: Pamela Hegarty MBA ’92, Boston Common Asset Management

**Concurrent Session B:** Company Analysis by Asset Class: Equities, Fixed-Income  
Seaport A

Karen Choi, Fixed Income Investment Analyst, Capital Group
Divya Gopal, High Yield Credit Analyst, T. Rowe Price
Ellen Lee, Fundamental Research Associate, Causeway Capital Management
Shilpa Mehra, Research Analyst/Portfolio Manager, Fidelity Investments
Nichol Merritt, Director and Head of Private Placement ABS and Finance Companies, TIAA-CREF
Moderator: Tom Sprague ’79, private investor, retired PM, Fidelity Investments
Erin Bell, Portfolio Specialist
Maisa Badawy, Equity Trading
Barbara Burtin, Equity Investment Analyst
Noriko Honda Chen, Portfolio Manager
Karen Choi, Fixed Income Investment Analyst
Alice T. Davison, Senior HR Manager, Investment Group Recruiting
Cheryl E. Frank, Equity Investment Analyst
Natasha Mounier, Equity Investment Analyst
Diana Wagner, Equity Investment Analyst

Sarah Ketterer, Chief Executive Officer
Ellen Lee, Fundamental Research Associate

Melissa Reilly, CIO, Equity Group
Elizabeth Cheverie, MBA Recruiter
Janet Glazer, Research Analyst
Charles Hebard, Managing Director of Research
Shilpa Mehra, Research Analyst/PM
Jill O'Connell, VP, Asset Management and Recruiting
Jean Park, Equity Research Analyst
Morgen Peck, Domestic Portfolio Manager
Megan Saltzman, Research Analyst
Richard Thompson, Managing Director of Research
Whitney Young, Research Analyst

Kevin Beatty, Director of Equity
Katie Cannan, Equity Research Analyst
Lauren Luciano, Investment Staffing Manager
Katey Lynch, Investment Recruiting Coordinator
Ted M. Maloney, Director of Research
Johnathan Munko, Equity Research Analyst
Richard Offen, Equity Research Analyst
Erica Schulte, Equity Research Analyst
Brooks Taylor, Equity Portfolio Manager
Nicole Zatlyn, Equity Portfolio Manager

Kristen Chang, Recruiting Associate, Campus Recruiting
Elizabeth (Beth) MacLean, Executive Vice President, Bank Loan Portfolio Manager
Melody Rollins, Executive Vice President, Head of U.S. Institutional Client Management
Elise Scales, MBA Recruiter

Aaron Cooper, Director of Global Equity Research
Jacquelyne Cavanaugh, Analyst, Equity Research
Kathryn Lakin, Assistant Director of Research
Christina Mellinger, Manager, Human Resources
Amy Armstrong, Vice President, Director of SSgA GHR
Patricia Basso, Vice President, Senior HR Business Partner, SSgA
Lynn Blake, Executive Vice President, CIO Global Equity Beta Solutions
Amy Cheng, Vice President, Senior Portfolio Manager, Global Equity Beta Solutions, SSgA
Jeff Dorigan, Vice President, Global Head of Professional Development Program
Paul Francisco, Vice President, Global Inclusion and Head of University Relations, North America
Stephanie Gonzalez, Recruiting Coordinator, Executive Recruitment
Rakhi Kumar, Vice President, Corporate Governance, SSgA
Vanya Kuneva, Principal, Intermediate Quantitative Research Analyst, Active Quantitative Equity, SSgA
Lin Liu, Global Graduate Rotational Program, SSgA
Ami Teruya, Vice President, Senior Portfolio Manager, Active Emerging Markets Equity, SSgA
Bruce Westgate, Vice President, Head of Executive Recruitment

Judy Capon, Director, HR Business Partner
Mark Johnson, Senior Director, Talent Acquisition, Human Resources, Global Asset Management & Real Estate
Nichol Merritt, Director and Head of Private Placement ABS and Finance Companies
Melissa Otto, Director Active Equity Research

Anna Dreyer, Vice President and Quantitative Analyst, Asset Allocation Group
Divya Gopal, High-Yield Credit Analyst, Fixed Income Division
Jennifer Martin, Vice President and Portfolio Specialist, U.S. Equity Division
Heather McPherson, Vice President, U.S. Equity Division
Preeta Ragavan, Investment Analyst, U.S. Equity Division
Eric Veiel, Vice President, PM, and Director of Equity Research (North America)

Catherine Arnold, Global Industry Analyst
Melissa Harris, Human Resources
Alyssa Irving, Fixed Income Portfolio Manager
Nataliya Kofman, Equity Research Analyst
Maureen Pettrossi, Associate Director, Global Equity Portfolio Management
Carolina Piery, Equity Research Analyst
Lindsay Politi, Fixed Income Portfolio Manager
Emily Wilson, Business Manager, Fixed Income Business Management
<table>
<thead>
<tr>
<th>Name</th>
<th>School</th>
<th>MBA Class</th>
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<tbody>
<tr>
<td>Carolina Carvalho</td>
<td>Columbia University, Graduate School of Business</td>
<td>2016</td>
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<tr>
<td>Soyun Choi</td>
<td>Columbia University, Graduate School of Business</td>
<td>2015</td>
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<td>Eugenia Gandoy</td>
<td>Columbia University, Graduate School of Business</td>
<td>2016</td>
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<td>Lauren Harmon</td>
<td>Columbia University, Graduate School of Business</td>
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<td>Betty Huang</td>
<td>Columbia University, Graduate School of Business</td>
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<td>Elizabeth Joyce</td>
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<td>Aphrodisa Kasih</td>
<td>Columbia University, Graduate School of Business</td>
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<td>Jennifer Potter</td>
<td>Columbia University, Graduate School of Business</td>
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<td>Danielle Ross</td>
<td>Columbia University, Graduate School of Business</td>
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<td>Sisy Wang</td>
<td>Columbia University, Graduate School of Business</td>
<td>2016</td>
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<td>Eliza Buddenhagen</td>
<td>Cornell University, Samuel Curtis Johnson Graduate School of Management</td>
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<td>Amy Wang</td>
<td>Cornell University, Samuel Curtis Johnson Graduate School of Management</td>
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<td>Katrina Jensen</td>
<td>Dartmouth, Tuck School of Business</td>
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<td>Elizabeth Jin</td>
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<td>Shailaja Kaveti</td>
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<td>Emma Zhang</td>
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<td>Wilma Burdis</td>
<td>Duke University, The Fuqua School of Business</td>
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<tr>
<td>Christina Yu Chen</td>
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<td>Elizabeth Li</td>
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<td>Arita Sehgal</td>
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<td>Ting Sun</td>
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<td>Shang (Kelly) You</td>
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<td>Shanshan Xu</td>
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<tr>
<td>Alejandra Cure</td>
<td>New York University, Stern School of Business</td>
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<td>Perryne Desai</td>
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<td>Yang Lu</td>
<td>New York University, Stern School of Business</td>
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<td>Katherine Shrinkareva</td>
<td>New York University, Stern School of Business</td>
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<tr>
<td>Emily Wu</td>
<td>New York University, Stern School of Business</td>
<td>2016</td>
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</table>
Bing Jiang  University of Chicago, Booth School of Business  2016
Ayako Nakayama  University of Chicago, Booth School of Business  2016
Marina Sitsiuhina  University of Chicago, Booth School of Business  2016
Amy Zhang  University of Chicago, Booth School of Business  2016

Kelsey Bandeen  University of Pennsylvania, Wharton  2016
Magda Drobnicki  University of Pennsylvania, Wharton  2016
Liz Gilson  University of Pennsylvania, Wharton  2016
Katherine Han  University of Pennsylvania, Wharton  2016
Emily Xiaoyue He  University of Pennsylvania, Wharton  2016
Kate Powell  University of Pennsylvania, Wharton  2016
Joyce Ye  University of Pennsylvania, Wharton  2016
Sunnie (Sunyoung) Yun  University of Pennsylvania, Wharton  2016
Bebe Zhao  University of Pennsylvania, Wharton  2016
Laura Zhu  University of Pennsylvania, Wharton  2016
Charlotte Dagher  University of Virginia, Darden School of Business  2016
Caitlyn McClay  University of Virginia, Darden School of Business  2016
Marci Stewart  University of Virginia, Darden School of Business  2016
Wanjin Chen  Yale School of Management  2016
Pamela Jao  Yale School of Management  2016
Shaena McPadden  Yale School of Management  2016
Joyce Zhang  Yale School of Management  2016

Names in bold indicate students participating in the stock pitch showcase.
Dinner Keynote, Thursday, November 20, 2014

Melissa Reilly, CIO, Equity Group
Fidelity Investments
Melissa Reilly is chief investment officer at Fidelity Management & Research Company (FMRCo), the investment advisor for Fidelity’s family of mutual funds. Fidelity Investments is a leading provider of investment management, retirement planning, portfolio guidance, brokerage, benefits outsourcing and other financial products and services to more than 20 million individuals, institutions and financial intermediaries. In this role, she is responsible for investment management oversight of the Capital Appreciation and Growth teams, as well as the Equity Capital Markets team.

Prior to assuming her current position in March 2013, Melissa held various other roles with Fidelity, including that of portfolio manager of Fidelity Europe Capital Appreciation Fund, Fidelity Advisor Europe Capital Appreciation Fund, and the Europe portion of Fidelity Global Balanced Fund from 2007 to 2013, portfolio manager of Fidelity Nordic Fund from 2009 to 2011 and Fidelity Europe Fund from 2008 to 2012, and research analyst in the Global Research Group from 2004 to 2007. Before joining Fidelity in 2004, she worked as a senior vice president, portfolio manager, and International Core research analyst at Putnam Investments from 1999 to 2004, an associate in Equity Research at Morgan Stanley & Co., and as a staff consultant at Anderson Consulting, where she began her career in 1995. She has been in the investments industry since 1995.

Melissa earned her bachelor of arts degree in economics from Columbia University and her master of business administration degree from the University of Chicago.

Barbara Burtin is an equity investment analyst at Capital Group with research responsibility for European and Latin American banks. She has four years of investment experience, all with Capital Group. Prior to joining Capital, Barbara worked in business development for Capital One Financial in the United States, France and Italy. She also brings a variety of other international business experiences, including entrepreneurship and management consulting. She holds an MBA with honors from the Wharton School of the University of Pennsylvania and a master’s degree in finance from HEC Paris. Barbara is based in Los Angeles.

Noriko Honda Chen is an equity portfolio manager at Capital Group. She has 22 years of investment experience and has been with Capital Group for 14 years. Earlier in her career, as an equity investment analyst at Capital, Noriko covered Asian infrastructure, building materials and construction companies, as well as oil, gas & refining companies. Before joining Capital, she worked in the research department of Worldsec International Limited in Hong Kong (a subsidiary of Mitsubishi Bank) and was a manager in corporate finance. Noriko holds a bachelor’s degree in economics from Williams College and a degree in the Japanese Language Bekka Program at Keio University, Tokyo. Noriko is based in San Francisco.

Karen Choi is a fixed-income investment analyst at Capital Group with research responsibility for domestic utilities and regional banks. She has 16 years of investment experience and has been with Capital Group for seven years. Prior to joining Capital, she was a senior vice-president and fixed-income analyst with AllianceBernstein and before that she was with Prudential Financial. She holds a bachelor’s degree in international relations from Wellesley College. She also holds the Chartered Financial Analyst® designation. Karen is based in New York.

Alice Davison is a talent acquisition senior manager at Capital Group, where she focuses on global investment group recruiting. She has 27 years of industry experience, all with Capital Group. Earlier in her career at Capital, Alice worked as a human resources manager, as a fund administrator and consultant for Capital Research International and as a coordinator of The Associates Program (TAP), a two-year series of work assignments in various areas of the organization. Alice was also a TAP participant. She holds an MBA with distinction from the Stern School of Business at New York University and a bachelor’s degree in economics from Bowdoin College. Alice is based in New York.

Capital Group*  
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Maiya Badawy is an equity trader at Capital Group. She has 13 years of investment industry experience and has been with Capital Group for 4 years. Prior to joining Capital, Maiya was a Primary Trader with Fidelity Management & Research. Before that, she was an Associate in the brokerage development program at Fidelity Capital Markets. She holds a bachelor’s degree in psychology from Harvard University. She also holds the Chartered Financial Analyst® designation and is a member of the CFA Society United Kingdom.

Erin E. Bell is a portfolio specialist at Capital Group. She has 18 years of investment industry experience, all with Capital Group. She holds an MBA from London Business School and a bachelor’s degree in economics from the London School of Economics. Erin is based in London.

Alice Davison is a talent acquisition senior manager at Capital Group, where she focuses on global investment group recruiting. She has 27 years of industry experience, all with Capital Group. Earlier in her career at Capital, Alice worked as a human resources manager, as a fund administrator and consultant for Capital Research International and as a coordinator of The Associates Program (TAP), a two-year series of work assignments in various areas of the organization. Alice was also a TAP participant. She holds an MBA with distinction from the Stern School of Business at New York University and a bachelor’s degree in economics from Bowdoin College. Alice is based in New York.
Cheryl E. Frank is an equity investment analyst at Capital Group with research responsibility for the health care services sector and drug retail industry, as well as for software companies in both the U.S. and Europe. She has 14 years of investment experience and has been with Capital Group for 11 years. Prior to joining Capital, she was a fixed-income derivatives marketing associate at J.P. Morgan. She holds a master’s degree and certificate in global management and public management from Stanford Graduate School of Business, and a bachelor’s degree in environmental science and public policy from Harvard College graduating cum laude. Cheryl is based in San Francisco.

Natasha Braginsky Mounier is an equity investment analyst at Capital Group with research responsibility for companies domiciled in Africa, Eastern Europe, Israel, Russia and Turkey. She has 20 years of investment experience and has been with Capital Group for 11 years. Prior to joining Capital, she was an investment banker at J.P. Morgan and the Blackstone Group. She holds an MBA from Harvard Business School and a bachelor’s degree in economics from the School of Foreign Service, Georgetown University. Natasha is based in London.

Diana Wagner is an equity investment analyst at Capital Group with research responsibility for global semiconductor equipment and paper & forest products companies, as well as U.S. health care services companies. She has 15 years of investment experience and has been with Capital Group for 12 years. Prior to joining Capital, Diana was at ING Barings in London and at SBC Warburg in New York. She holds an MBA from Columbia Business School and a bachelor’s degree in art history from Yale University. Diana is based in New York.

Janet Yoo Glazer is a research analyst at Pyramis Global Advisors, a Fidelity Investments company. In this role, Janet is responsible for equity research coverage of US and Latin American industrials including conglomerates, multi-industry, aerospace & defense, machinery, building products, transports, professional services, engineering & construction, transportation logistics, and transportation infrastructure. Prior to focusing on industrials, Janet covered the global energy sector researching alternative energy, refining and coal equities. Prior to joining Fidelity, Janet was a senior manager at E*TRADE Financial in charge of global trading and portfolios from 2006 to 2009. She has been in the investments industry since 2006.

Janet earned her bachelor of science degree in humanities with a focus on behavioral economics from the Massachusetts Institute of Technology and her master of business administration degree from the Massachusetts Institute of Technology Sloan School of Management.

Charles Hebard is a managing director of research at Fidelity Management & Research Company (FMRCo), the investment advisor for Fidelity’s family of mutual funds. Fidelity Investments is a leading provider of investment management, retirement planning, portfolio guidance, brokerage, benefits outsourcing and other financial products and services to more than 20 million individuals, institutions and financial intermediaries. In this role, Charlie oversees the financials and industrials research teams.

Prior to assuming his current position, Charlie managed Fidelity Blue Chip Value Fund, VIP Value Leaders Portfolio, and Fidelity Advisor Value Leaders Fund from 2006 to 2010. Previously, he managed various other Fidelity funds, including Fidelity Financials Central Fund from 2006 to 2007, Select Financial Services Portfolio, Fidelity Advisor Financial Services Fund and VIP Financial Services Portfolio from 2005 to 2007, Select Brokerage and Investment Management Portfolio in 2006, Select Insurance Portfolio from 2004 to 2006, Select Energy Service Portfolio from 2002 to 2004, and Select Leisure Portfolio from 2001 to 2002. Prior to that, Charlie was an equity research analyst following the newspaper, printing, gaming, and cruise ship and leisure durable industries starting in 1999. Before joining Fidelity full time, he was an equity research analyst intern at Fidelity in 1998. Previously, Charlie was an assistant vice president at Citicorp Securities, Inc. from 1996 to 1997, and also worked as an associate for the High Yield Finance group and Global Media & Communications group at Citicorp Securities, Inc.

Charlie earned his bachelor of arts degree in economics, magna cum laude, from the University of Pennsylvania and his master of business administration degree in finance from The Wharton School at the University of Pennsylvania. He is also a Chartered Financial Analyst (CFA) charterholder.

Shilpa Mehra is a research analyst/portfolio manager at Fidelity Management & Research Company (FMRCo), the investment advisor for Fidelity’s family of mutual funds. Fidelity Investments is a leading provider of investment management, retirement planning, portfolio guidance, brokerage, benefits outsourcing and other financial products and services to more than 20 million individuals, institutions and financial intermediaries. In this role, Shilpa is responsible for analyzing and rating stocks, supporting
portfolio managers, and for the coverage of payments, processors and consumer finance within the financials sector. She also manages Select Consumer Finance Portfolio (since 2012).

Prior to assuming her current responsibilities, Shilpa covered business services within the cyclical sector from 2009 to 2011. Before joining Fidelity full time in 2009, she interned at Fidelity as a research analyst covering the generic pharmaceuticals industry in 2008. Previously, Shilpa interned at Gabelli Asset Management as a research analyst responsible for analyzing trends in the food industry. Prior to this, Shilpa worked in various startup companies as well as venture capital, where she was primarily responsible for business development and strategy. She has been in the investments industry since 2009.

Shilpa earned her bachelor of arts degree in finance from New York University and her master of business administration degree in finance and accounting from Columbia University. At Columbia, Shilpa was selected for and completed the Value Investing Program. She was also co-president of the Columbia Investment Management Association.

Jill O’Connell is Vice President of Talent Management for the Asset Management business within Fidelity Investments. In this role, Jill is responsible for all talent acquisition and talent development for 10 offices globally across all segments of Fidelity’s retail and institutional businesses. In addition, she is also responsible for strategic and competitive talent analysis and partners with Fidelity’s senior leaders to develop talent strategies for new business initiatives in global offices.

During her 14 years with Fidelity, Jill has also held leadership positions in global investment recruiting and executive staffing and sourcing. Prior to joining Fidelity, Jill worked in human resources for Nvest Financial and State Street Research and Management.

Ms. O’Connell holds a Bachelor of Science degree from Boston University.

Jean Park is a portfolio manager at Fidelity Management & Research Company (FMRCO), the investment advisor for Fidelity’s family of mutual funds. Fidelity Investments is a leading provider of investment management, retirement planning, portfolio guidance, brokerage, benefits outsourcing and other financial products and services to more than 20 million individuals, institutions and financial intermediaries. In this role, she manages Fidelity Growth Strategies Fund and VIP Growth Strategies Portfolio.

Prior to assuming her current responsibilities in 2013, Jean managed Select Leisure Portfolio from 2010 to 2013 and was an equity research analyst on the Consumer team from 2010 to 2013 and the Financials team from 2006 to 2010. Before joining Fidelity in 2006, Jean worked at Goldman Sachs Asset Management as an associate from 2003 to 2004, and as an analyst from 2001 to 2003. Previously, she was an intern at JP Morgan in 2000. She has been in the investments industry since 2001. Jean earned her bachelor of arts degree in economics from Harvard University, where she graduated magna cum laude, and her master of business administration degree in finance, with honors, from The Wharton School at the University of Pennsylvania. She is a Chartered Financial Analyst (CFA) charterholder and a member of the Boston Security Analysts Society.

Morgen Peck is a domestic portfolio manager at Fidelity Management & Research Company (FMRCO), the investment advisor for Fidelity’s family of mutual funds. Fidelity Investments is a leading provider of investment management, retirement planning, portfolio guidance, brokerage, benefits outsourcing and other financial products and services to more than 20 million individuals, institutions and financial intermediaries. Morgen is a portfolio manager the financials and consumer sleeves for Small Cap Opportunities Fund and Stock Selector Small Cap Fund, of U.S. Small Cap Pilot Fund, as well as a co-manager of Global Small Cap Pilot Fund.

She has been in the investments industry since joining Fidelity in September 2003. Morgen earned her bachelor of arts degree in economics from Harvard University. She is also a Chartered Financial Analyst (CFA) charterholder.

Melissa Reilly is chief investment officer at Fidelity Management & Research Company (FMRCO), the investment advisor for Fidelity’s family of mutual funds. Fidelity Investments is a leading provider of investment management, retirement planning, portfolio guidance, brokerage, benefits outsourcing and other financial products and services to more than 20 million individuals, institutions and financial intermediaries. In this role, she is responsible for investment management oversight of the Capital Appreciation and Growth teams, as well as the Equity Capital Markets team.

Prior to assuming her current position in March 2013, Melissa held various other roles with Fidelity, including that of portfolio manager of Fidelity Europe Capital Appreciation Fund, Fidelity Advisor Europe Capital Appreciation Fund, and the Europe portion of Fidelity Global Balanced Fund from 2007 to 2013, portfolio manager of Fidelity Nordic Fund from 2009 to 2011 and Fidelity Europe Fund from 2008 to 2012.
Sarah H. Ketterer is the chief executive officer of Causeway, portfolio manager for the firm’s fundamental and absolute returns strategies, and is responsible for investment research across all sectors. Ms. Ketterer is a member of Causeway’s operating committee. She co-founded the firm in June 2001.

From November 1996 to June 2001, Ms. Ketterer worked for the Hotchkis and Wiley division of Merrill Lynch Investment Managers (“HW-MLIM”). At HW-MLIM, she was a managing director and co-head of the firm’s HW-MLIM International and Global Value team. From 1990 to 1996, Ms. Ketterer was a portfolio manager at Hotchkis and Wiley, where she co-founded the international equity product. Ms. Ketterer is currently a director of the Music Center Foundation, the Los Angeles World Affairs Council and the Broad Stage. Ms. Ketterer has a BA in Economics and Political Science from Stanford University and an MBA from the Amos Tuck School, Dartmouth College.

Ellen Lee is a research associate at Causeway. She joined the firm in August 2007.

From 2001-2004, Ms. Lee was an associate in the Mergers and Acquisitions division of Credit Suisse First Boston in Seoul, and from 1999-2000, she was an analyst in the Mergers and Acquisitions division of Credit Suisse First Boston in Hong Kong.

Ms. Lee has a BA in Business Administration from Seoul National University and an MBA from the Stanford Graduate School of Business.

Kevin Beatty is an investment officer and the director of equity, North America, at MFS Investment Management. He is also a portfolio manager of large-cap core portfolios. As Director of Equity - North America, Kevin leads MFS’ portfolio management and research efforts in the North America region. In his role as a core equity portfolio manager, Kevin is responsible for final buy and sell decisions, portfolio construction, and risk and cash management. Additionally, he participates in the research process and strategy discussions. He is based in MFS’ Boston office.

Kevin joined MFS in 2002 as an equity research analyst and was named portfolio manager in 2004. Prior to assuming the role of director of equity, North America in 2011, he served as director of US Research
beginning 2007. Previously, he was an equity analyst/sector head for State Street Research Management Co. and an investment research analyst for Fleet Investment Advisors.

He earned a Master of Business Administration from Babson College and a Bachelor of Arts degree from St. Bonaventure University.

Katherine (Katie) A. Cannan is an Equity Research Analyst for MFS Investment Management. As an Equity Research Analyst, she is responsible for identifying the most attractive investment opportunities, working closely with MFS portfolio managers to ensure ideas are properly positioned within portfolios.

Katie joined MFS in 2013 full time following her participation in the firm’s MBA Summer Internship Program. Prior to MFS, Katie spent two years as an Associate for Thomas H. Lee Partners and two years as an Analyst for Goldman, Sachs & Co. Katie earned her Bachelor of Arts Degree from Northwestern University and is an alumna of Phi Beta Kappa. She holds a Masters of Business Administration from Harvard Business School.

Edward (Ted) M. Maloney is an Investment Officer and the Director of U.S. Research at MFS Investment Management. He also serves as a portfolio manager on US Core Equity strategies. As the director of US research, Ted oversees the MFS US equity research team. In his role as a core equity portfolio manager, he is responsible for the final buy and sell decisions, portfolio construction, and risk and cash management. Additionally, Ted participates in the research process and strategy discussions. He is also a member of the MFS Global Equity Management Team. Ted is based out of MFS’ headquarters in Boston.

Ted joined MFS in 2005 and was named Director of U.S. Research in 2011. He was named portfolio manager in 2012. Prior to joining MFS, he was an analyst and founding partner for Lyceum Capital, LP. He also spent two years as a research associate for Fidelity Management & Research Company. Ted earned his Bachelor of Arts degree from Bowdoin College, graduating magna cum laude.

Richard L. Offen is an investment officer and an equity research analyst at MFS Investment Management. He is responsible for identifying the most attractive investment opportunities in his assigned universe and works closely with portfolio managers to ensure investment ideas are properly positioned within MFS portfolios. Prior to joining MFS in 2011, Richard worked as an investment banking associate Stifel, Nicolaus and Co., Inc. for one year. He spent three years in investment banking at FBR Capital Markets where he worked as an associate and an analyst. He also participated in MFS’ MBA internship program as an equity research analyst in 2010. Richard earned his Bachelor of Arts degree from Davidson College and holds a Master’s of Business Administration from the University of Virginia. Our portfolio managers are supported by our entire team of investment professionals in nine worldwide offices. The team employs a proprietary investment process to build better insights for our clients. The core principles of our approach are integrated research, global collaboration, and active risk management.

Erica E. Schulte is an Equity Research Analyst for MFS Investment Management. As an Equity Research Analyst, she is responsible for identifying the most attractive investment opportunities, working closely with MFS portfolio managers to ensure ideas are properly positioned within portfolios. Prior to joining MFS in 2011, Richard worked as an investment banking associate Stifel, Nicolaus and Co., Inc. for one year. He spent three years in investment banking at FBR Capital Markets where he worked as an associate and an analyst. He also participated in MFS’ MBA internship program as an equity research analyst in 2010. Richard earned his Bachelor of Arts degree from Davidson College and holds a Master’s of Business Administration from the University of Virginia. Our portfolio managers are supported by our entire team of investment professionals in nine worldwide offices. The team employs a proprietary investment process to build better insights for our clients. The core principles of our approach are integrated research, global collaboration, and active risk management.

Johnathan P. Munco is an investment officer and equity research analyst at MFS Investment Management. He is responsible for identifying the most attractive investment opportunities in his assigned universe. He works closely with portfolio managers to ensure investment ideas are properly positioned within MFS portfolios. He is based in Boston. Johnathan joined MFS in 2010 after participating in the firm’s MBA analyst intern program. Prior to MFS, he was a senior associate at PriceWaterhouseCoopers, LLP for five years. Johnathan earned his Bachelor of Science Management magna cum laude degree from Boston College. He holds a Master’s of Business Administration from Dartmouth College’s Tuck School of Business. Our portfolio managers are supported by our entire team of investment professionals in nine worldwide offices. The team employs a proprietary investment process to build better insights for our clients. The core principles of our approach are integrated research, global collaboration, and active risk management.

Brooks A. Taylor is an investment officer and portfolio manager at MFS Investment Management. As an equity portfolio manager, Brooks is responsible for final buy and sell decisions, portfolio construction, risk and cash management. He also participates in the research process and strategy discussions. Brooks joined MFS in 1996 as an analyst. Prior to joining the firm, he was an analyst with Lodestar Group, a subsidiary of Société Générale. He has also held positions as an analyst with Fidelity Management
and Research Company and Salomon Brothers. Prior to his current assignment he was a portfolio manager of our large-cap core portfolios.

Brooks earned a Master of Business Administration degree from The Wharton School of the University of Pennsylvania and a Bachelor of Arts degree in economics from Yale University.

Nicole M. Zatlyn is an investment officer and non-US equity portfolio manager at MFS Investment Management. She co-manages a number of investment portfolios, including the MFS Canadian Core Equity and Canadian Growth Equity strategies. As a portfolio manager, Nicole is responsible for final buy and sell decisions, portfolio construction, and risk and cash management. She also participates in the research process and strategy discussions. Nicole is based in MFS’ Boston office. Nicole joined MFS in 2001 as an equity research analyst. Her sector coverage responsibilities were the insurance, semiconductors, and electrical equipment industries. She was appointed to be portfolio manager in May 2005. Prior to joining MFS, she served two years as an investment analyst for Bowman Capital Management and three years as an equity research associate for Morgan Stanley. She earned a Bachelor of Commerce degree with highest distinction from McGill University and a Master of Business Administration degree from Stanford University.

Elise Scales is a campus recruiter in the Newport Beach office, focusing on MBA recruiting. She joined PIMCO in 2008 and has worked on both lateral and campus recruiting efforts. She has five years of recruiting experience and holds an undergraduate degree in international business and cultural anthropology from Vanguard University.

Jacquelyne J. Cavanaugh is an Analyst in the Large Cap Equities Group at Putnam Investment, responsible for covering asset managers, exchanges, and insurance. She is responsible for conducting fundamental analysis and valuation of the companies in this industry and making buy/sell recommendations. In addition, she is a portfolio manager of Putnam Global Financials Fund and Putnam Global Sector Fund. Ms. Cavanaugh joined Putnam in 2011 and has been in the investment industry since 1995, having worked at Janus Capital Group, Goldman Sachs & Co., and Donaldson, Lufkin & Jenrette prior to her time at Putnam. Jackie received a B.A. in Business Economics, Business Management, and Political Science from Brown University and an MBA from Harvard Business School.

Aaron M. Cooper is Director of Global Equity Research at Putnam. In this role, he oversees the global equity research effort at Putnam, managing analysts across the Boston, London, and Singapore offices. In addition, he is Portfolio Manager of Putnam Global Sector Fund and Putnam Research Fund. A CFA charterholder, Mr. Cooper joined Putnam in 2011 and has been in the investment industry since 1999. Aaron received his A.B. in Economics from Harvard University.

Kathryn Lakin is an Analyst and Assistant Director of Research in the U.S. Large Cap Equity Research Group, covering consumer staples, specifically packaged food. She is responsible for conducting fundamental analysis and valuation of the companies in this industry and making buy/sell recommendations. In addition, she oversees and manages the Equity Associate internship and full-time program. Ms. Bachman joined Putnam in 2012 and has been in the investment industry since 2008. Kathryn received her B.A. in psychology at Wellesley College.
Amy E. Armstrong is a Vice President of State Street Global Advisors and a member of SSgA Human Resources team. Amy provides strategic HR support and consultation to the Investment organization globally. This includes talent management, succession planning, and HR solutions that support the SSgA business vision. Prior to her role as a Business Partner Amy was a senior staffing associate for SSgA responsible for all hiring domestically. Amy joined State Street Corporation in 2003 as a senior recruiter for the Corporate Information Technology groups and moved to SSgA in March of 2004. Prior to joining State Street, Amy worked in the staffing industry as a recruiter and business development manager. Amy earned a Bachelor’s of Arts Degree in Communications from The Ohio State University in 1993.

Patricia Basso is a Vice President and Senior HR Business Partner for State Street Global Advisors. Patty provides strategic and consultative HR support to the Investment organization globally. This includes talent management, succession planning, and HR solutions that support the SSgA business vision and goals. Prior to joining SSgA, Patty was an HR Business Partner and Manager of Global Talent Acquisition at MFS Investment Management. Patty joined MFS in 1997 where she had progressive HR roles in Benefits, Talent Acquisition, Employee Relations and HR Management during her tenure. Patty earned a BS in Business Administration from the University of Wisconsin in 1989, and an MS in Human Resource Management from Emmanuel College in 2001.

Lynn Blake is an Executive Vice President of State Street Global Advisors (SSgA) and CIO of Global Equity Beta Solutions. In this capacity, she oversees a team of 60 portfolio managers globally, and more than 1,000 portfolios with assets in excess of $1.1 Trillion across all equity index and advanced beta strategies. She also oversees SSgA’s Corporate Governance and Global Proxy Voting as well as the Company Stock Group which manages fiduciary transactions and company stock investments, including company stock ownership and 401K plans. In addition, Ms. Blake is a member of the SSgA Fiduciary Committee, the Investment Committee, and the IT Steering Committee. Prior to her current role, she was head of non-US markets of passive equities, responsible for overseeing the management of all non-US equity index strategies, as well as serving as portfolio manager for several equity index portfolios. She joined SSgA in 1987. Ms. Blake holds her Master of Business Administration in finance from Northeastern University, and a Bachelor of Science from the Boston College Carroll School of Management. She also earned the Chartered Financial Analyst (CFA) designation and is a member of the CFA Institute and the Boston Security Analyst Society. Lynn also serves on various index advisory boards and committees.

Amy Cheng is a Vice President of State Street Global Advisors and a Senior Portfolio Manager in the Global Equity Beta Solutions team where she is responsible for managing various domestic and international strategies. Prior to assuming her current role in May 2008, Amy worked in the Global Implementation Group where she performed the day-to-day management of active developed and emerging market equity portfolios. She also worked as an Operations Associate responsible for funds managed by the active international equities team. Prior to joining SSgA in 2000, Amy worked as a Trust Specialist at Mellon Financial. Amy earned a Bachelor of Arts degree in Economics and Political Science from the University of Rochester and an MBA from the Carroll School of Management at Boston College.

Jeffrey P. Dorigan is a Vice President and the Head of University Relations for State Street. Jeff is also the Head of the State Street Professional Development Program (PDP) – a global training, development, and rotational program designed to identify, hire, and cultivate employees with cross-functional knowledge and the skills necessary to become leading management professionals within State Street. In this role, Jeff is responsible for the overall global program, including both the program’s design and the on-going management of the program and its participants in North America, EMEA, and APAC. Previously, Jeff was a Vice President of State Street Global Advisors and a manager within the Project Management Office. He was responsible for managing global, cross-functional projects related to SSgA’s core initiatives. Jeff joined SSgA in 2007 and managed a number of significant initiatives during his tenure, including the design and launch of SSgA’s Global Graduate Rotational Program, DC Strategy, DC Carve-Out, Client On-Boarding, Securities Lending Operational Readiness, and the Legal Governing Documents projects.

Prior to joining State Street, Jeff was a Director with Parametric Technology Corporation’s Global Services business, managing the P&L and overall operations for a $100M North American service business unit. Additionally, Jeff spent 8 years as an entrepreneur, launching and managing two separate technology services businesses – one of which was named one of Inc. Magazine’s 500 Fastest Growing Companies in 2003. Jeff holds an MBA from UCLA’s Anderson School of Business and a Bachelor’s degree in both English and Politics from Lake Forest College.

Paul Francisco is a Vice President of Global Inclusion and Head of University Relations for North America at State Street Corporation. In this role, Paul is
responsible for the setting of short and long term strategies to support State Street’s diversity and Inclusion goals globally. He is also responsible for the strategic development of State Street’s On-Campus recruitment activities that include professional development programs for graduates and undergraduates, internships, Co-Ops and community recruitment programs. Prior to joining state Street, Paul was a Managing Director and Co-founder of Foster & Francisco LLC, an executive search firm based in Boston, focusing on the recruitment and retention of senior managerial and executive level diverse talent across a number of diverse industries, and not-for-profit organizations. Before starting Foster & Francisco, Paul held a number of HR roles with organizations like Fidelity, Bank of America, The Gillette Company and Amica Mutual Insurance. His experience includes Training and Development, Workforce Diversity, Diversity Recruitment, Consulting, and Client Relationship Management. Paul is a graduate of Boston University where he majored in Political Science with a concentration in International Relations, and is a graduate of the UMASS-Boston College of Management Emerging Leaders Program for the Center for Collaborative Leadership, as well as The Partnership Inc., Next Generation Executive Program.

Stephanie Gonzalez is Recruiting Coordinator within Global Human Resources supporting Executive Recruitment. She is responsible for ensuring positive client and candidate experience from prospect to hire. Her responsibilities include managing the interview & onboarding process and collaborating with top tier executives on ad hoc projects surrounding Talent Acquisition. Stephanie started her career as a recruiter for Commonwealth Resources, a niche recruiting firm based out of Boston. Stephanie attended Boston College and holds a Bachelor of Arts degree in Psychology and Sociology.

Rakhi Kumar, CA, is Vice President, Corporate Governance at State Street Global Advisors. Rakhi’s responsibilities include research and analysis of governance issues across domestic and global investment strategies, with particular focus on M&A transactions and emerging market investments. Prior to joining SSgA, Rakhi was Senior Research Analyst at Proxy Governance, Inc. (PGI), and has also worked at the Institute of International Finance (IIF), Moody’s Investors Service and Booz Allen Hamilton, among other organizations. Rakhi has built expertise in evaluating corporate governance at the company and country level in developed and emerging market countries. At PGI, Rakhi provided voting recommendations on proxies of non-US companies and on M&A transactions. At the IIF, Rakhi made corporate governance policy reforms recommendations to governments of several emerging market countries and developed a best practice guide for financial institutions on lessons learned from the financial crisis. Rakhi has also developed and conducted corporate governance training programs for directors and financial analyst in emerging market countries. Rakhi has an MBA from Yale University and is a Member of the Institute of Chartered Accountants of India. In 2008, Rakhi received the “Rising Star Award” from the Millstein Center for Corporate Governance.

Anna Mitelman Lester is a Vice President of State Street Global Advisors and a Senior Portfolio Manager for the U.S. Active Quantitative Equity Team. She has substantial experience developing quantitative strategies and managing investment portfolios using quantitative disciplines. Anna is responsible for portfolio management and research for the US active small cap investment strategies. Prior to joining SSgA, Anna was an analyst and portfolio manager at Putnam Investments and its subsidiary PanAgora Asset Management. Anna holds a BA in Computer Science and Mathematics from Wellesley College and an MBA from the MIT Sloan School of Management. She is a member of the Boston Security Analysts Society and CFA Institute.

Vanya D. Kuneva is a Principal of State Street Global Advisors and Intermediate Quantitative Research Analyst in the firm’s Active Quantitative Equity group. She conducts investment research focused on generating, developing and rigorously testing quantitative stock selection strategies for the Active Quantitative Equity Group. Vanya started her career as a Banker at Bank of Oklahoma. Vanya earned the Chartered Financial Analyst designation and is a member of the CFA Institute.

Lin Liu, CFA, is member of the Global Graduate Rotational Program at State Street Global Advisors, a two year cross-functional program engineered to provide candidates with a diverse skill set and a broad perspective into SSgA. Prior to joining SSgA, Lin attended MIT Sloan School of Management, earning her MBA with a concentration in Finance and General Management. Before business school, Lin worked for China International Capital Corporation as a risk generalist. She also had experiences in Mubadala Development Company in Abu Dhabi, UAE, as a summer associate in 2011. She has a BS in Finance from Tsinghua University, Beijing.

Ritirupa Samanta, Ph.D, is a Vice President of State Street Global Advisors and a Senior Quantitative Research Analyst at the Advanced Research Center (ARC). Ritit heads the research teams working in tactical asset allocation and currency, developing quantitative models to determine optimal allocation between markets, regions and assets in the former and for return forecasting, risk measurement and
portfolio construction in the latter. Prior to joining the ARC, Riti was Senior Research Associate at State Street Associates (SSGM). There she developed indicators of institutional flow behavior and analyzed the fundamental relationships between institutional flows, holdings and returns in equity and currency markets. Her broader research interest is in the area of Extreme Value Theory (EVT), specifically the effect of incorporating non-normalities and time sensitive correlation structures in various aspects of quantitative modeling. Riti earned her PhD in International Finance and Economics from Brandeis University. She has an MS in Finance from Brandeis as well as a BA in Economics (with a minor in mathematics) from Reed College, where she held the Walter Mintz scholarship in Economics.

Ami Teruya is a Vice President of State Street Global Advisors and a Senior Portfolio Manager in the Active Emerging Markets equity team. She is responsible for coverage of Latin American equities in Chile, Colombia, and Peru. Ami joined SSGA in February 2004 as a Quantitative Research Analyst in the Advanced Research Center (ARC), and she spent eight years working with the Developed and Emerging Market Active equity teams to enhance existing and develop new quantitative investment models. Previously, she spent 18 months working in the Tokyo office with the Japanese Active equity team. Ami obtained her BSBA from Boston University School of Management, with a dual concentration in Finance and Information Systems.

Bruce F. Westgate is a Vice President and Head of Executive Recruitment at State Street Corp. His primary focus is on recruitment at the Senior Vice President, Senior Managing Director or Executive Vice President level. He also focuses on Senior Investment roles within SSGA. His main functions are to source and recruit talented individuals to join State Street Corporation, SSGM or SSGA, work with the hiring managers to define the positions needs and requirements, manage the entire interview process from prospect to hire and to work on special projects related to staffing and recruitment. Prior to joining SSGA in 2004, Bruce worked for Hoffman Recruiters as a senior recruiter focusing on the Banking, Insurance and Legal sectors. Bruce spent two years with Hoffman and was a team lead at the time of his departure. Bruce started his recruitment career at Robert Half International where he spent five years focusing primarily in the Information Technology Sector. There he moved from the consulting division to the fulltime placement division and was later promoted to the Divisional Director of the Boston IT Search Division. Bruce holds a Bachelor degree from the University of Miami in Marketing.

Nichol Merritt is a director on the Global Private Markets team for the TIAA-CREF organization. She focuses on investment grade debt private placements and heads up the Private Placement ABS and Finance Company vertical. Ms. Merritt joined the TIAA-CREF organization in 2007 and was previously a member of the Global Public Markets team focusing on structured credit research.

Prior to joining TIAA-CREF, Ms. Merritt held a variety of roles at other organizations, most recently on the CDO research team at Wachovia Securities. At Deutsche Bank, she helped pioneer research efforts supporting the roll out of their credit derivatives business before which she supported ABS research. Earlier in her career she held roles in ABS research at Barclays Capital, Bank of America Securities and JP Morgan. She has been a regular speaker at structured products industry conferences.

Ms. Merritt holds a Bachelor of Arts in Economics and Political Science from The University of Michigan. She formerly was an active member of the Asset Securitization Forum’s Investor Committee.

Melissa Otto is a director and equity research analyst for the TIAA-CREF organization. Ms. Otto is responsible for covering the Japanese consumer space and is also responsible for managing market-neutral and long/short portfolios focused on Japanese equities. Ms. Otto joined the TIAA-CREF organization in 2010. Ms. Otto has 14 years of industry experience. Previously, she was a senior investment analyst on an international and global growth fund at American Century Investments. Prior to this position, she was a fund manager/analyst for GE Asset Management based in their Tokyo office.

Ms. Otto earned a B.A. from Ursinus College and an M.A. in International Economics and Finance from Brandeis University where she was an American Scholar. Ms. Otto recently completed a three-year position on Brandeis University’s Board of Overseers and is a member of 100 Women in Hedge Funds and 85 Broads.
Anna Dreyer is a vice president of T. Rowe Price Group, Inc., and T. Rowe Price Associates, Inc. She is a quantitative analyst in the Asset Allocation Group. Anna joined the firm in 2008. She earned a B.S. and an M.Eng. in electrical engineering and computer science with a minor in economics and a Ph.D. in biomedical engineering, all from the Massachusetts Institute of Technology (MIT). While at MIT, Anna was an Intel Women in Science and Engineering Scholar. Anna has also earned the Chartered Financial Analyst designation.

Divya Gopal is a high yield credit analyst in the Fixed Income Division at T. Rowe Price. Prior to joining the firm in 2013, she served as an intern with T. Rowe Price. Divya also worked as an associate at Cyan Partners, LP, and as an analyst at Morgan Stanley, both in New York. She earned a B.A. with distinction in economics and political science from the University of North Carolina at Chapel Hill and an M.B.A. from the London Business School.

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Preeta Ragavan is an investment analyst in the U.S. Equity Division, covering apartments, student housing, and self-storage companies under the real estate sector. She joined the firm in 2014 after serving as a summer intern with T. Rowe Price in 2013, covering packaging companies. Preeta earned an A.B. in economics from Cornell University, graduating with distinction in all subjects, and an M.B.A. from Columbia Business School, graduating with honors. Prior to pursuing her M.B.A., Preeta was an equity research analyst at Barclays in New York.

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Catherine J. Arnold is Vice President and Global Industry Analyst at Wellington Management. As an analyst in Global Industry Research, Catherine specializes in pharmaceuticals. She conducts fundamental analysis on the companies within her industry and makes buy/sell recommendations to portfolio managers based on her findings and market conditions. She is a member of Wellington Management’s Health Care Team.

Prior to joining the firm in 2013, Catherine spent nine years at Credit Suisse as a managing director and senior analyst covering the US pharmaceutical industry and served as the global head of pharmaceutical research for the investment bank (2004 – 2013). She joined Credit Suisse from Sanford C. Oxford Partners, LP, and as an analyst at Morgan Stanley, in New York.
C. Bernstein, where she was a senior analyst covering European pharmaceutical stocks (1999 – 2004). Before her roles in financial services, Catherine worked in the drug industry in strategic and marketing areas at Hoffmann-La Roche (1995 – 1999), as a consultant with Booz Allen & Hamilton (1992 – 1995), and as a registered nurse at the University of Pittsburgh Medical Center (1987 – 1990).

Catherine earned her MBA (1990), MHA (1990), and bachelor of science in nursing (1987) from the University of Pittsburgh.

**Alyssa A. Irving** is Vice President and Fixed Income portfolio manager at Wellington Management. As a fixed income portfolio manager on the Financial Reserves Management (FRM) Team, she is responsible for managing US Broad Market portfolios for clients with customized risk and return objectives often related to accounting and/or regulatory constraints, such as insurance clients. Additionally, she is responsible for managing select constrained structured-finance portfolios. She is a member of the Short Duration Strategy Group and the Structured Finance Strategy Group.

Prior to joining Wellington Management in 2006, Alyssa was a portfolio manager at Citigroup Alternative Investments where she covered CMBS, ABS, and non-agency mortgages (2005 – 2006). Before that, she was a vice president at Alliance Capital, where she was a member of the ABS and Non-Agency Mortgage Research team (2003 – 2005). She also held a variety of positions at Fitch Ratings, where she rated ABS and CDOs (1998 – 2003). Alyssa began her career as a CMBS research analyst at Nomura Securities (1996 – 1998).

Alyssa earned her BS in business administration with a concentration in finance from the University of Vermont (1996).

**Nataliya Kofman** is an equity research analyst in Global Equity Portfolio Management on the Quality Value Team at Wellington Management. She conducts fundamental analysis on fundamental analysis on global equity investments, focusing on the industrial, insurance, automotive, and semiconductor sectors. She also focuses on non-US stocks for the Global Quality Equity Portfolio. Nataliya’s research supports the investment decision making for a range of portfolios managed for clients of the firm. She works in our Boston office.


Nataliya earned her MBA from Harvard Business School (2006) and her MS (1997) and BS (1996), magna cum laude, in mechanical engineering from the University of Michigan. She is fluent in Russian and Ukrainian.

**Maureen H. Pettitrossi** is Vice President and Associate Director in Global Equity Portfolio Management at Wellington Management. As an associate director, Maureen works on a variety of strategic and tactical business issues within Global Equity Portfolio Management. In this role, she assists with the day-to-day management of the group and also represents the group in a variety of cross-functional initiatives. Before she joined GEPM, Maureen worked as an investment director within Equity Product Management.


Maureen earned her BS in business administration from the University of New Hampshire (1987). Additionally, she holds the Chartered Financial Analyst designation and is a member of the CFA Institute and the Boston Security Analysts Society.

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Carolina earned her MBA from Columbia University (2007) and her BA, cum laude, in international relations and mathematics from Wellesley College (1998). She is fluent in French, Portuguese, and Spanish.

**Lindsay Politi** is Vice President and Fixed Income Portfolio Manager at Wellington Management. Lindsay is a member of the US Interest Rate Investment Team, where she specializes in TIPS and inflation-linked
bond investing. In addition to managing Wellington Management’s dedicated US TIPS and global inflation-linked bond portfolios, she makes inflation-linked investment recommendations for portfolios across the Fixed Income Group.

Lindsay joined Wellington Management in 2000 to work with the Global Bond Team and transferred to the Core Bond Strategy Group in 2002.

Lindsay received her MS in finance from Boston College (Carroll, 2005) and her BA in economics from Wellesley College (2000).

Emily L. Wilson is Vice President and Business Manager at Wellington Management. As a business manager in Fixed Income, Emily focuses on managing the growth of the fixed income business by tackling both strategic and tactical business issues. She facilitates coordination between the various fixed income portfolio management and analyst groups and their interface with Systems, Human Resources, Relationship Management, Product Management, Finance, and Investment Administration.


Emily earned an MS in investment management, with high honors, from Boston University (2009) and a BA in bioethics and women’s studies, magna cum laude, from Bowdoin College (2004). She holds the Certificate in Investment Performance Measurement (CIPM) and Chartered Financial Analyst (CFA) designations and is a member of the CFA Institute and the Boston Security Analysts Society.

Moderator Bios

Pamela Hegarty is a Vice President and Global Equity Analyst at Boston Common Asset Management. She has 17 years of experience in equity research and portfolio management, specializing in the technology and energy sectors. Pam previously held positions with State Street Global Advisors, Baring Asset Management and Janus Capital. In addition, she served over two years as Director of Investor Relations for First Solar, an alternative energy company, and had earlier experience working for industrial and technology companies. Pam earned her A.B. from Harvard University and an MBA from Cornell University’s Johnson School. She is a CFA charter holder and a member of the Boston Security Analysts Society. In her free time, Pam enjoys playing ice hockey and has completed eight marathons.

Tom Sprague has been involved with the stock market for over 20 years. As an analyst at Fidelity, he was responsible for stock picks in a wide variety of industries, from technology to leisure to steel. As a portfolio manager there he managed up to $12 billion in several retail mutual funds and institutional retirement portfolios, emphasizing a growth style of investing. Although no longer at Fidelity, he remains an active private investor, and assists several not-for-profit organizations with their investment and financial decisions. Sprague’s work experience includes sixteen years at Fidelity Investments, where he served, successively, as equity analyst, equity portfolio manager, and group leader; and eight years as an industrial engineer at Eastman Kodak. He currently serves as the Finance Committee Chair on the Board of Directors at Sturdy Memorial Hospital in Attleboro, MA; the Finance Committee Chair for the Evangelical Covenant Church in Chicago, IL; and the Investment Committee Chair for the Covenant Trust Company in Chicago, IL. Tom also sits on the Board of Directors for an Albuquerque based startup company TruTouch Technologies. Tom currently is an Executive in Residence at Johnson and an occasional guest lecturer for the Cayuga Fund class. Sprague earned his BS in operations research and industrial engineering at Cornell University in 1979, and his MBA in finance at the Wharton School in 1989.
Professor Sanjeev Bhojraj
Faculty Director of the Parker Center
Professor of Accounting

Professor Sanjeev Bhojraj teaches the Applied Portfolio Management course associated with the $4 million student-managed, faculty-directed, equity hedge fund, the Cayuga MBA Fund, LLC at the Samuel Curtis Johnson Graduate School of Management at Cornell University. His research interests are in the area of behavioral finance, discretionary disclosure of information by firms, and corporate governance mechanisms. His teaching interests encompass applied portfolio management and financial analysis. Professor Bhojraj received the Apple Award for Teaching and the Clifford H. Whitcomb Faculty Fellowship, both in 2001, and the Executive MBA Globe Award for Teaching Excellence in 2003. In addition, he received outstanding faculty recognition in the 2003 edition of Business Week's Guide to The Best Business Schools. Professor Bhojraj is a Chartered Accountant and a Cost Accountant.

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Founder, Women in Investing Conference
Breazzano Family Executive Director, Parker Center for Investment Research

Lakshmi Bhojraj joined the Parker Center in June 2003. In her role as Executive Director, she has oversight of the $4 million Cayuga MBA Fund, is responsible for developing and maintaining corporate relationships for the Parker Center, advises students with an interest in asset management careers, and runs several signature events for the Center and Johnson, including the MBA Stock Pitch Challenge, the Women in Investing (WIN) Conference, which she founded in 2010, and the Undergraduate Stock Pitch Challenge, which she initiated in 2011. Prior to assuming her current role, she was an equity analyst at Salomon Smith Barney, now Citi, where she covered the Life Sciences industry. Lakshmi is a graduate of Johnson and also obtained her undergraduate degree from Cornell University. Prior to obtaining her MBA, Lakshmi was an associate in the equity research department at Deutsche Bank, where she covered the medical devices industry.

Colleen Homan
Parker Center Office Coordinator

Colleen Homan joined the Parker Center in 2004 after six years in other areas of Johnson. Previously, she worked with the school's Entrepreneurship faculty and BR Ventures (the student-managed venture capital fund) and as the school's graduate field assistant for doctoral candidates. She came to Johnson with prior experience in the Cornell University Controller's office and in the Human Resources department of a private firm in Ithaca.
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where we are headed next