Scholars of Finance

2023 Mid-Atlantic Symposium

Hosted by Princeton Princeton University

INSPIRING CHARACTER & INTEGRITY IN THE FINANCE LEADERS OF TOMORROW

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Mid-Atlantic Symposium
SoF
2023

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Registration
9:30-11:50 AM

Dodds Atrium
Robertson Hall

Opener: Ross Overline
12:10-12:30 PM

Keynote: Mike Baxter
12:30-1:15 PM

McCosh 50
McCosh Hall Entrance 5

Networking Sessions and Career Fair

	Group A	Group B	Group C
Session 1 1:25-2:00 PM	Professional Networking Session JRR Perel Atrium	Career Fair & Resume Reviews JRR A-Level Rooms	Student Networking & Lunch SPIA Berenstein Gallery
Session 2 2:10-2:45 PM	Career Fair & Resume Reviews JRR A-Level Rooms	Student Networking & Lunch SPIA Berenstein Gallery	Professional Networking Session JRR Perel Atrium
Session 3 2:55-3:30 PM	Student Networking & Lunch SPIA Berenstein Gallery	Professional Networking Session JRR Perel Atrium	Career Fair & Resume Reviews JRR A-Level Rooms

Panel
3:40-4:50 PM

Robertson Hall
Panel 1 Room 100 | Panel 2 Room 016 | Panel 3 Room 001

Mike Baxter

Senior Partner

Bain & Company

MIKE BAXTER is a seasoned financial consultant with broad experience in financial services, including retail, corporate, and investment banking, and wealth management. He has worked closely with banks on post-recession organizational restructuring, through working with management and government and regulatory stakeholders.

Mike is a member of Bain's Global Strategy Practice, where he works in seed-to-scale acceleration to innovate, create, and scale strategic solutions, reimagine business models, and generate industry insights.

Mike is the former head of Bain's Americas Financial Services practice; during this time, he led Partner teams to direct financial services clients on practice strategy, direction, and evaluation.

He is also an alumnus of The Wharton School and University of Oxford.

Bain & Company

Bain is a global consultancy that helps the world's most ambitious change makers define the future, working alongside their clients with a shared ambition to achieve extraordinary results, outperform the competition, and redefine industries. Bain complements tailored, integrated expertise with a vibrant ecosystem of digital innovators to deliver better, faster, and more enduring outcomes.

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Merav Pepere

Managing Director, International and Data CIO

Morgan Stanley

MERAV PEPERE is an innovative CIO with over 30 years of experience in large scale business-driven technology transformation, strategic planning, leadership and talent development. She has a proven track record of cultivating effective business partnerships across the organization and driving to measurable business results through technology innovation and dynamic leadership.

Merav joined Morgan Stanley in 1993 as a system analyst and has held a succession of leadership positions during her more than 25-year career with the Firm. As International & Data CIO, she is responsible for Morgan Stanley's diverse International Technology footprint across their Global In-house Centers (GICs), Europe and Asia.

One of the first women to serve on the Firm's Technology Operating Committee, Merav had a central role in the growth of Morgan Stanley's U.S. banks. She believes that "For tech to be effective, it is important that we create a diverse workforce that reflects our society". Merav founded the WIT Network (Women in Technology), an employee group that began as a resource for women in the Americas and now operates globally. She is heavily engaged with D&I activities in EMEA, and is a senior sponsor for the Firm's Girls Who Code program, establishing virtual summer immersion programs in India, EMEA and Canada for the first time in 2022.

Morgan Stanley

Morgan Stanley helps people, institutions and governments raise, manage and distribute the capital they need to achieve their goals. Since their founding in 1935, Morgan Stanley has consistently delivered first-class business in a first-class way.

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Marcelo Bartholo

Vice Chair

Ernst & Young

Building a better working world

MARCELO BARTHOLO leads over 14,000 diverse professionals from Maine to Virginia in helping organizations operate, innovate and transform. Building on his foundation of exceptional client service, Marcelo drives business growth, cultivates belonging among the people of EY and sustains the cadence of the US-East Region's economic output.

At EY, Marcelo has led major client engagements in risk transformation, IPO readiness, process improvement, and IT for the consumer products, industrial, energy, and technology sectors.

Marcelo believes deeply in equity for all and fostering a culture of inclusion. He has served as the EY Americas Consulting D&I Executive Sponsor and is a member of the EY Americas Inclusiveness Advisory Council and the EY US-East Region Ethnicity Task Force.

Marcelo earned his BS in Finance and International Business from Marquette University in 2001 and has been working at EY since then.

Ernst & Young
EY's purpose is "building a better working world". EY does so through the insights and quality services they provide and by developing outstanding leaders who team to deliver on their promises to all stakeholders.

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Natasha Holbeck

Partner

Deloitte

NATASHA HOLBECK is Partner and Family Office Audit Leader at Deloitte, serving clients across multiple industries and geographies. She has experience in all aspects of the Investment Management Industry with a particular emphasis on family offices, wealth management and advisory corporate entities, as well as a multitude of investment products, including hedge funds, private equity funds, fund-of-funds, ETFs, registered investment companies, and commodity pools.

Natasha has extensive background auditing internal controls for public and private companies, including Sarbanes-Oxley reporting. Additionally, she completed a rotation in the National Office Audit group, leading projects related to financial instruments, alternative investments, and fair-value measurements. She serves as an engagement quality control review partner for several engagements and routinely supports Deloitte's annual quality inspections.

She received her Bachelor of Commerce from the University of Port Elizabeth.

Deloitte

Deloitte aims to be the best at all that they do—to help clients realize their ambitions, to make a positive difference in society, to maximize the success of people and communities, and to deliver measurable, sustainable results. This drive fuels the commitment and humanity that run deep through Deloitte's every action.

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Bill Dunigan

Director & Head of Wealth Distribution Partners

BlackRock

BlackRock

BILL DUNIGAN is a Director and Head of Wealth Distributions Partners at BlackRock, an asset and investment managements firm that strives to help more people experience financial well-being. He is committed to advancing investment access, sustainable outcomes, and inclusive economies.

Prior to BlackRock, Bill was a director at Gazelle Group, a marketing consulting group that specializes in developing business plans for sports and entertainment events. Alongside his current positions at BlackRock Bill also sits on the Advisory Board for BUILD Boston, an organization that supports student entrepreneurs with the vision of a world where all students—regardless of race, socioeconomic status, or neighborhood— develop the skills and connections needed to achieve economic power and freedom.

Bill graduated Princeton University in 2003 with a degree in Politics.

BlackRock

BlackRock is one of the world's leading providers of investment, advisory and risk management solutions. A fiduciary to their clients, BlackRock is investing for the future on behalf of clients, inspiring employees, and supporting local communities.

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Bei Ling

Head of Human Relations

Wells Fargo

BEI LING is responsible for all aspects of Wells Fargo's human capital strategy. She works closely with leaders across Wells Fargo's global footprint to build a world-class culture and foster an inclusive environment committed to attracting, developing, engaging, and retaining the best talent.

Before joining Wells Fargo, Bei was managing director and global head of Talent Development and Total Rewards at JPMorgan Chase. She was accountable for driving strategy and implementation across multiple global functions.

Bei previously was deputy head of Human Resources at PNC Financial Services, where she led multiple large-scale HR initiatives, including the PNC/National City merger and a redesign of the bank's talent programs.

She graduated from Peking University with a major in Indian Civilization and went on to get her MBA from the University of Southern California.

Wells Fargo

Wells Fargo works to create positive social impact in the communities it serves by supporting housing affordability, small business growth, financial health, and a low-carbon economy.

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Randy Kane

Managing Partner

Profec Partners

RANDY KANE is an experienced entrepreneur turned investor with more than 25 years of experience in building, managing, and investing in high-growth companies. As a partner at Profec Partners, he identifies unique businesses with potential for scale and provides growth capital to early-stage companies through traditional venture capital investments.

Kane works closely with entrepreneurs, providing strategic advice and financial advice to help them achieve their business goals. Randy's expertise also includes management consulting, where he co-founded a leading boutique consultancy, Acquis Consulting Group, and designed custom solutions for global clients.

Most recently, Kane served as COO and Advisor to the CEO of DanceBody, helping to build and grow the company from inception and expand it on a global scale. Randy's vast experience makes him an asset to any company looking to grow and succeed.

Profec Partners

Profec Partners develops and capitalizes on disruptive themes that create unique investment opportunities within the health and wellness sector, including fitness, technology, and consumer-focused businesses.

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Arielle Patrick

Chief Communications Officer

Ariel Investments

ARIELLE PATRICK has spent her entire career as a chief advisor to Fortune 500 public and private company CEOs and boards on investor relations, reputation management and risk assessment, crisis management and scenario planning, and all-stakeholder communications strategies for financially material matters (e.g. transactions, earnings, litigation, governance).

Arielle led Ariel Investments' rebranding strategy and restructured the firm's previous five marketing functions into one centralized practice.

Prior to Ariel, Arielle worked at Edelman, where she oversaw new business and P&L for the M&A / restructuring group, and individually secured client deals totaling over $50 billion in enterprise value as Executive Vice President & Transaction Director.

She received a Bachelor’s Degree in Classics from Princeton University.

Ariel Investments

Ariel Investments is a $16.2 billion global asset management firm that values active patience, independent thinking, focused expertise, and teamwork.

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JC de Swaan

Partner at Cornwall Capital

Lecturer at Princeton University

PRINCETON UNIVERSITY

JC DE SWAAN teaches courses on Ethics in Finance and Asian Capital Markets at Princeton University, where he is affiliated with the Bendheim Center for Finance within the Economics Department.

JC is also a Partner at Cornwall Capital Management, an investment corporation based in New York that was profiled in the book *The Big Short* as one of the few investors that correctly foresaw the subprime mortgage crisis of 2007. Before Cornwall, JC worked at McKinsey & Company and was a senior advisor on China at a global macro fund.

He received a BA in Political Science at Yale as well as an MPhil in International Relations from University of Cambridge and a Masters in Public Policy from Harvard. JC's book, Seeking Virtue in Finance: Contributing to Society in a Conflicted Industry, was published in 2020.

Cornwall Capital Management

Cornwall seeks highly asymmetric investments, in which the upside potential significantly exceeds the downside risk, across a broad spectrum of strategies ranging from trades that seek to benefit from market inefficiencies to thematic fundamental trades.

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Amber Mahone

Managing Partner

Energy and Environmental Economics, Inc.

AMBER MAHONE is Managing Partner at Energy and Environmental Economics and head of the firm's Clean Energy Team. Her work looks across all sectors of the energy economy to evaluate the feasibility and implications of long-term climate solutions and she enjoys unpacking meaningful results from complex models and translating them into actionable decision points for E3's clients.

Over the past 15 years at E3, Amber's work has drawn on her expertise in policy analysis, energy systems modeling, resource planning, and energy efficiency. Amber began her career working in international development at the International Monetary Fund. Today, she is excited to be part of the revolution in renewable energy and electric vehicles, which is radically transforming the global energy economy.

Amber received a BA in International Relations from Wellesley College and a Master of Public Affairs at Princeton University.

Energy and Environmental Economics, Inc.

E3 is a fast-growing energy consulting firm that helps utilities, regulators, policy makers, developers, and investors make the best strategic decisions possible as they implement new public policies, respond to technological advances, and address customers' shifting expectations.

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Vicki Henn

Chief Human Resources Officer

PNC Bank

VICKI HENN is executive vice president and chief human resources officer for The PNC Financial Services Group. In her role, she oversees all aspects of the employee experience, including talent acquisition and development, total rewards, employee engagement and leadership development.

As a skilled HR strategist with a passion for people, purpose and performance, Vicki effectively enables change, empowers employees and inspires results. In addition to serving as PNC's chief human resources officer, Vicki is a board member of the PNC Foundation, a member of PNC's Corporate Diversity Council and the executive sponsor of PNC's Multicultural Employee Business Resource Group.

She is an alumnus of Fairleigh Dickinson University and went on to study law at Seton Hall University.

PNC Bank

For more than 170 years, PNC has been committed to providing their clients with great service and powerful financial expertise to help them meet their financial goals. They are proud of their longstanding history of supporting not only customers but also their communities, employees and shareholders.