

SUMMARY: Experienced Board Director & Advisor. Qualified Financial Expert, Risk Director & Technology Expert. She leverages international and institutional fund management expertise to advise and serve on boards. An executive career culminating as Chief Investment Officer for the Inter-American Development Bank's \$8.5 billion retirement portfolios, she previously led U.S. and private equities at the \$34B NRRIT and \$8B UMWA H&R Funds, and was OCIO for multi-\$million client portfolios in the mid-Atlantic and DMV regions, all highly-regulated financial institutions. She integrates expertise in investment and enterprise risk management, governance and technology, macroeconomic and geopolitical issues, sustainability and global economic development, regulatory compliance and stakeholder communication to her work on boards. Her deep analytical and investing experience in infrastructure (energy, real estate, utility), multi-asset investment expertise, and extensive international experience (Africa, Europe, Latin & North America, the Caribbean and IADB) are foundational to service on fiduciary and advisory boards, particularly her engagement on Boards' Audit, Executive, Finance, Governance, Medical, Operations, Retirement & Risk Committees.

BOARD & INDUSTRY SKILLS:

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| • Audit, Governance & Risk Board Committees | • Legal/Regulatory Compliance & Enterprise Risk Management |
| • AI, automation & digital Innovation & Oversight | • Strategic Growth & Business Transformation |
| • Cybersecurity Controls & Governance | • Sustainability & Resilience Oversight |
| • Financial, Capital & Asset/Liability Acumen | • Technology Oversight: AI, Cyber, Transformation |
| • International Expertise & Global Strategy | • Thought leadership: Finance, Governance, Policy |
| • Investment / Portfolio Management | |

BOARD EXPERIENCE:

- **Board Member** Private Directors Association DC Metro – Program Cmte Chair 2026+
- **Board Member** IADB Retirees' Association Economic Development, Washington, DC 2026+
Chair, Medical Committee; Appointee, Retirement Plans' Managing & Pension Committees
- **Board Member** Eastern University Education, St. Davids, PA 2005 – 2007, 2025+
Finance Committee.
- **Advisory Board Member** NACD Capitol Area Governance Association, Arlington, VA 2025+
- **Audit & Risk Committee Member** Reall, Ltd. Economic Development, Coventry, U.K. 2024+
- **VP & Board Director** Memton Fund Philanthropic Foundation, New York, NY 1993+
President, V.P., Director and Member of Audit, Executive, Investment Committees
- **Steering Committee-Education** DCRO Institute Education, Columbus, OH 2025+
- **Board Member** NAISMA Economic Development, Iowa 2025
Finance-Audit-Risk, Executive, Board Development & Governance Committees
- **Board Member** CFA Society, Phila & Wash., DC Governance, Phila, DC 1995 – 2003
- **Board Member** Women's Opportunity Resource Ctr. Economic Dev't., Philadelphia, PA 1996 - 1998
- **Board Advisor** IADB, NRRIT, UMWA Funds Multiemployer Plans, Washington, DC 2001 - 2024
- **Committee Advisor/OCIO** CoreStates & Riggs Banks Company Plans, Wash, DC & PA 1994 - 2000

BOARD & INDUSTRY CONTRIBUTIONS:

- **Board Committees:** Audit & Risk: Audited financials (FASB, ICFR, SASB), compliance & risk (AML/CFT, COSO), laws & regulations, policies & procedures. Finance & Operations: ALM, Funding, Investment, Liquidity, Reserve Policies. Nom/Gov: Skills matrices, multi-generational onboard training.
- **2024 Industry Awards/Appointment:** Most Influential Women, Investment Management (Institutional Investor), Who's Who Women of Influence & in America (Marquis), NACD.DC Ambassador.
- **Industry Thought Leadership:** Curriculum development (CFA, CAIA, NACD), event speaker, writer.
- **International Experience:** Canada, El Salvador, France, Haiti, Honduras, Liberia, Mali, Nicaragua, Portugal.
Languages: French (intermediate), German (elementary), Spanish (intermediate).
- **Mentoring/Leadership:** Teach investments (American College of Financial Services Adjunct Faculty), Coach professionals (ReachIRE) and athletes (Cat2 cyclist, Team USA duathlete, equestrian, Black Belt kempoka).

INVESTMENT FUND / INTERNATIONAL SKILLS:

- Scales assets 2-10x through growth & sales
- Drives sustainable fund performance
- Operates effectively in global environment.
- Continuously learning, engaging, serving.
- Engages as Board Director and Advisor.
- Builds talent in global, high-performing teams.
- Drives automation, efficiency, innovation.
- Creates governance & industry curriculum.

INVESTMENT FUND / INTERNATIONAL EXPERIENCE:

Inter-American Development Bank: \$8.5B multi-asset Washington, DC 2007 – 2024
Executive Secretary (acting), Head of Investment (CIO): Led 21-staff department (3+ months), 10-staff multinational team. Invested 15+ asset classes, built portfolios resilient in financial/market crises with superior risk-adjusted returns and ½ industry fee rates. Ran ALM studies, built LDI investment policies, coordinated reporting communications to boards, executives & participants. Implemented controls: audit (ICFR, SASB), compliance (COSO & ICFR), policies and procedures, regulatory, robotic process automation.

- Developed Board Funding & Risk Appetite Policies; grew assets 2.5x, ran 3 asset-liability studies.

National Railroad Retirement Investment Trust: \$14.5B equities Washington, DC 2003 – 2006
Director of U.S. Equity: Designed multimanager portfolio, created multi-manager portfolio, hired staff.

- Outperformed benchmark by 1% (\$135M); contracted 25+ new external investment managers.

UMWA H&R Funds: \$3.5B U.S. & \$350M private equity Washington, DC 2001 – 2003
Senior Investment Advisor: Managed multimanager U.S. & PE portfolios, expanded PE reporting.

- Ran ALM study and updated IPS; implemented external manager and liability valuation systems.

Merrill Lynch PF&S (Bank of America): \$750M foundations Washington, DC 2000 – 2001
Investment Advisor: Created robust, customized multimanager portfolios.

Riggs & Co. (PNC Financial): \$250M multi-asset Washington, DC 1998 – 2000
Managing Director: Managed 100+ corporate, foundation and trust client funds, increased assets 2x.

CoreStates (Wells Fargo): \$250M multi-asset Lancaster, Philadelphia, Malvern, PA 1994 - 1998
Vice President: Managed 100+ institutional portfolios, increased assets 10x; developed model portfolios.

Shearson/Lehman Bros. (Barclays), Analyst/Operations Malvern PA & NYC 1992 – 1993

Sun Life Assurance Company of Canada, Equity Analyst Wellesley Hills, MA 1987 – 1989

Scudder, Stevens & Clark (Zurich), Research Assistant Boston, MA 1985 – 1987

Thomson Financial Networks, Equity Earnings Consultant Boston, MA 1991

Cause Canada, Economic Development Project Manager Mali & Liberia, W. Africa 1989 – 1990

DIDAC, Bi-lingual Assistant Paris, France 1981 – 1982

EDUCATION / CERTIFICATIONS:

Eastern University, Master of Business Administration, Global Economic Development 1995

Princeton University, Bachelor of Arts, Political Science 1985

Digital Directors Network, Qualified Technology Expert 2026

DCRO Institute, Qualified Risk Director, Certificates in Risk & Cyber Risk Governance 2025

Harvard Business School Online, AI for Leaders 2025

National Association of Corporate Directors, Directorship & Cybersecurity, ESG Oversight 2022 & 2025

Private Directors Association, Private Company, Private Equity & ESOP Governance Certificates 2025

National Association of Corporate Directors, (NACD.DC) 2022

Sustainable Accounting Standards Board, FSA 1 2022

CFA Institute, Chartered Financial Analyst and CFA ESG Certificate 1989 & 2022

CAIA Association, Chartered Alternative Investment Analyst 2007

Project Management Institute, Project Management Professional 2006

Pennsylvania State University, Project & Supervisory Management Certificates 1997, 1998