

**TOIGO**



**ADVANCING PROFESSIONAL EXCELLENCE**

**People. Purpose. Passion.**

**FALL APEX WEEKEND  
SEPTEMBER 12-14, 2014  
AUSTIN, TEXAS**

## Welcome from Nancy Sims, President

We are very pleased to welcome you our annual APEX Leadership Weekend.

Realizing that you're gearing up (if you haven't already) for the start of school, we wanted to host this Toigo "kickoff" early to help support your academic and career goals. Hosting this event at the start of the academic year also provides you introduction to an amazing national network of Toigo Fellows which we encourage you to keep vibrant. Today, there are Toigo partnerships, teams and families that have developed from the start of the Toigo Fellow experience – the potential is endless! If you haven't joined the Official Toigo Fellow and Alumni Community on LinkedIn, please make sure to do so soon. It will be our channel for communicating updates on the Foundation and news on the career success of Fellows and Alumni, job postings and more. Keeping us informed helps us to share your great work.

By tradition, the Toigo APEX Leadership weekend has often been an eye-opening experience for many Fellows – presenting new ideas and considerations for your job search and long-term career plans. We encourage you to take every opportunity to meet the outstanding individuals, particularly the many alumni who have enthusiastically committed to participate in this program, and share their insights and expertise.

This is also a great time to establish your relationship with members of the Toigo team who will be closest to your experience during this two-year journey. Valerie Allen and Angel Stewart are committed to providing you the best support and counsel possible. Please engage them actively; keeping them informed of your progress and needs along the way.

Our partnership with you is dynamic, consistent and proactive. Today is just the start—our support and engagement with you will span your career progression as a finance professional, as the alumni this weekend will attest.

As Toigo celebrates its 25<sup>th</sup> Anniversary this year, this event is also a celebration of our 25<sup>th</sup> Class of Fellows – a mark of success for the organization as we continue to strengthen the Toigo brand within the finance industry.

We hope you enjoy the event!

A handwritten signature in black ink that reads "Nancy". The signature is written in a cursive, flowing style.

## 2014 FALL APEX AGENDA

### FRIDAY, SEPTEMBER 12<sup>th</sup>

TIME	EVENT/SESSION
10:00AM – 6:00PM	<p><b>Career Advising Sessions*</b></p> <p><i>Angel Stewart   Director of Talent Management, Toigo Foundation</i> *By Appointment Only</p>
3:00PM – 6:00PM	<p><b>Fellow Arrival &amp; Check-In</b> Hyatt Place Austin Downtown 211 East 3rd Street   Austin, TX 78701</p> <p><i>Hotel check in time is 3:00 pm</i></p>
5:00PM – 8:00PM	<p><b>Registration</b> Hyatt Place Lobby</p>
6:00PM – 8:00PM	<p><b>Welcome Reception</b> Hyatt Place Dining Room</p>

### SATURDAY, SEPTEMBER 13<sup>th</sup>

TIME	EVENT/SESSION
6:00AM – 6:20AM	<p><b>Late Registration</b> Hyatt Place Lobby</p>
6:30AM	<p><b>Depart Hotel</b> <i>Fellows meet outside Hyatt Place at 6:15am</i></p>
7:00AM – 7:30AM	<p><b>Breakfast &amp; Welcome</b> Multipurpose Room</p> <p><i>Valerie Allen   Program Manager, Toigo Foundation</i> <i>Stacey Winning   Dimensional Fund Advisors</i></p>
7:30AM – 8:30AM	<p><b>Teambuilding General Session</b> Multipurpose Room</p> <p><i>Valerie Allen   Toigo Foundation</i></p>
8:45AM – 9:15AM	<p><b>Dimensional Fund Advisors</b> Rex Sinquefeld Forum</p> <p><i>Eduardo Repetto PhD   Co-CEO &amp; Co-CIO</i></p>

The Toigo Foundation gratefully acknowledges the generosity of the Citi Foundation for a grant to support Toigo's APEX curriculum.

## 2014 FALL APEX AGENDA

SATURDAY, SEPTEMBER 13<sup>th</sup> (Continued)

TIME	EVENT/SESSION	
9:30AM – 11:30AM	<b>Career Workshop   Class of 2016</b> Rex Sinuefield Forum  “Ready, Aim, Hired! Honing Your Strategies for Your Summer Internship”  <i>Gabrielle Zandan   Texas McCombs</i> <i>Angel Stewart   Toigo Foundation</i>	<b>Career Workshop   Class of 2015</b> Merton Miller Forum  “Making the Most of your Mentoring Networks”  <i>Stacy Blake-Beard, PhD   Simmons College</i> <i>Nancy Sims   Toigo Foundation</i>
11:35AM – 12:30PM	<b>Ask the Expert: Toigo Alumni Panel</b> Rex Sinuefield Forum  Joseph Beard   Springboard Growth Network, Columbia 2005 Onay Payne   Clarion Partners, Harvard 2003 Erin Harkless   Cambridge Associates, Harvard 2012 Bryan Sanchez   Lionstone Investments, Harvard 2004 Barry Zhang   Quantico Energy Solutions, Kellogg 2006  Moderator, Steven Ballantyne   Vista Equity Partners, Kellogg 2009	
12:45PM – 1:30PM	<b>Lessons in Leadership Luncheon</b> Multipurpose Room  <i>Rosie Rios   Treasurer of the United States</i> <i>Introduction, Nancy Sims   President &amp; CEO, Toigo Foundation</i>	
2:00PM – 2:50PM	<b>Hedge Funds: The Investment &amp; Career</b> Rex Sinuefield Forum  <i>Dennis Hong   ShawSpring Partners</i>	
3:00PM – 4:30PM	<b>Track 1: Stock Valuation – A Quick Method</b> Merton Miller Forum  <i>Stanford Leeds   Texas McCombs</i>  <i>Note: Please bring financial calculator</i>	<b>Track 2: Perspectives in Private Equity</b> Rex Sinuefield Forum  <i>Edward Lewis, Chicago Booth 2004   UTIMCO</i> <i>Joseph Acevedo, Wharton 2003   Pharos Capital Group, LLC</i>
4:30PM – 5:00PM	<b>Toigo: Connect &amp; Commit</b> Rex Sinuefield Forum  <i>Valerie Allen   Program Manager, Toigo Foundation</i>	

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## 2014 FALL APEX AGENDA

### SATURDAY, SEPTEMBER 13<sup>th</sup> (Continued)

TIME	EVENT/SESSION
5:30PM	<b>Depart Dimensional Fund Advisors</b> <i>Load buses outside Building 1</i>
6:00PM – 8:30PM	<b>Fellow Dinner Program</b> Lake Austin Riverboats
9:00PM	<b>Return to Hotel</b> Hyatt Place Downtown Austin
9:30PM – 10:00PM	<b>Career Advising Sessions*</b>  <i>Angel Stewart   Director of Talent Management, Toigo Foundation</i> <i>*By Appointment Only</i>

### SUNDAY, SEPTEMBER 14<sup>th</sup>

TIME	EVENT/SESSION
9:00AM – 12:00PM	<b>Career Advising Sessions*</b>  <i>Angel Stewart   Director of Talent Management, Toigo Foundation</i> <i>*By Appointment Only</i>

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## Speakers & Facilitators



### Joseph Acevedo

Principal | Pharos Capital Group, LLC  
Toigo, Wharton 2003

Joseph Acevedo is a Principal at Pharos Capital Group, LLC. Prior to joining the company, Mr. Acevedo was Director of Business Development at Univision Communications, Inc. where he launched and managed the company's home entertainment division. Previously, Mr. Acevedo performed valuation and due diligence at JP Morgan as an equity research analyst covering the telecommunications and media industries. Mr. Acevedo began his career with Merrill Lynch & Co. where he was involved with structuring and executing numerous public finance and fixed income transactions. Mr. Acevedo graduated from Harvard College with an A.B., cum laude, in Government and holds an M.B.A. in Finance from the Wharton School. Mr. Acevedo is based out of the firm's Dallas office.



### Valerie Allen

Program Manager | Toigo Foundation

Valerie Allen joined the Toigo Foundation in April 2013 as Program Manager. Her core focus is on the MBA Education Track along with the APEx Leadership Development and other program initiatives. Mrs. Allen earned her B.S. in Business Administration from Seton Hall University and M.P.A. from San Francisco State University.

Prior to Toigo, Valerie worked in non-profit youth development in San Francisco, CA. She focused on helping underrepresented teens attain access to post-secondary education. She previously served at City Year Louisiana leading Young Heroes, a middle school leadership program. Valerie remains passionate about her commitment to youth and the community. She is active member of Delta Sigma Theta Sorority, Inc.



### Steven Ballantyne

Vista Equity Partners  
Toigo, Kellogg 2009

Prior to joining Project Realize, Mr. Ballantyne worked in business strategy and development at a prominent medical manufacturer and distributor. While there, he helped analyze new markets in the healthcare industry, managed the FDA approval process and design and patent new products.

Mr. Ballantyne was awarded his B.A. in Economics and Spanish from Davidson College, his MBA from the Kellogg School of Management and MPA from the Harvard Kennedy School of Government.

Mr. Ballantyne's tenure includes various positions in finance and community development at Morgan Stanley and at the Upper Manhattan Empowerment Zone. He was integral in providing capital and business acumen to small businesses in the Upper Manhattan landscape. He was also responsible for investment in mixed income communities and investment in the East River Plaza, a major landmark in Manhattan. In his spare time, Mr. Ballantyne is active in his community and mentors students applying to college and graduate school.

**Joseph Beard**

Co-Founder & Partner | Springboard Growth Network  
Toigo, Columbia 2005

Mr. Beard is a proven leader with a diversified background across investment banking, business development and organizational leadership. Currently, Mr. Beard serves as a Partner and Co-Founder of Springboard Growth Network. Launched in January 2014, Springboard is a specialty finance company focused on capital delivery to lower middle market companies. From 2012 to 2014, Mr. Beard served as a Senior Managing

Director at Sweetwater Holdings (an agriculture based start-up) where he was responsible for capital raising, corporate development and managing strategic partnerships. Prior to joining Sweetwater, Mr. Beard spent approximately eight years in the middle market investment banking industry focused on M&A and both debt and equity transactions. During this time, Mr. Beard held investment banking positions at Bank of America Merrill Lynch, MHT Partners and Bear Stearns. During his investment banking career, he advised clients on over \$6 billion in capital markets and M&A transactions. From 2009 to 2011, Mr. Beard served as a Senior Vice President at Bank of America Merrill Lynch where he covered clients primarily in the global industrial and consumer & retail sectors. Mr. Beard received a B.S. in Discrete Mathematics from the US Military Academy and an M.B.A. from Columbia Business School.

**Stacy Blake-Beard, PhD**

Professor | Simmons College School of Management

Stacy Blake-Beard is a Professor of Management at the Simmons College School of Management where she teaches organizational behavior. Dr. Blake-Beard has also been visiting faculty at the Indian School of Business in Hyderabad, India and at the Lorry I. Lokey Graduate School of Business at Mills College in Oakland, CA. At both institutions, she taught an elective on Gender, Diversity and Leadership. Dr. Blake-Beard is a Senior Faculty Affiliate at the Center for Gender in Organizations at Simmons. Prior to joining Simmons, Dr. Blake-Beard was faculty at the Harvard

University Graduate School of Education.

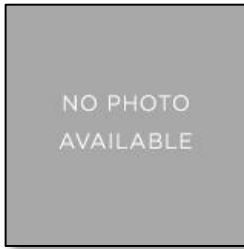
Dr. Blake-Beard has published research on gender, diversity, and mentoring in several publications including the *Journal of Career Development*, the *Academy of Management Executive*, the *Psychology of Women Quarterly*, *Journal of Management Development*, the *Journal of Business Ethics*, *Human Resource Management Journal*, *Journal of Management Education*, and *The Diversity Factor*. She is co-editor of a volume focused on women's careers (*Handbook of Research on Promoting Women's Careers*). She is also the recipient of a Fulbright Award, which was awarded to support her project, entitled "Systems of Sustenance and Support: Exploring the Impact of Mentoring on the Career Experiences of Indian Women," in partnership with the Center for Leadership, Innovation and Change at the Indian School of Business in Hyderabad, India.

**Erin P. Harkless, CFA**

Investment Director | Cambridge Associates LLC  
Toigo, Harvard 2012

Erin is an investment director in Cambridge Associates' Arlington office. She works with a variety of institutional investors and private clients on asset allocation strategy, manager selection, and investment program evaluation. Erin also has a particular interest in working with clients to develop strategies for social and mission driven investments.

Erin serves on the Junior Leadership Board of Sponsors for Educational Opportunity and the Social Investment Council of Echoing Green. A native Texan, she is an avid San Antonio Spurs fan and also enjoys reading and fiction writing in her spare time.

**Tiffany Harrison**

Diversity Recruiter, Graduate Recruitment | Citi

Tiffany Harrison is Assistant Vice President and Diversity Recruiter on Citi's Graduate Recruitment team. In this role, she is responsible for attracting and recruiting top diverse talent into both Analyst and Associate Programs at Citi. This is done by effectively managing Citi's partnerships with both non-profit organizations and with top undergraduate and business schools across the country.

Tiffany has over 10 years of experience working in various HR roles and functions at a variety of companies such as Colgate-Palmolive, UBS, and JP Morgan Chase.

**Dennis Hong**

Founder &amp; CIO | ShawSpring Partners

Dennis Hong is the Founder and Chief Investment Officer of ShawSpring Partners, a Boston-based global investment firm. Previously, he was a Principal and co-founder of Altimeter Capital, a travel and technology hedge fund based in Boston. At Altimeter Capital, Dennis oversaw the firm's growth from \$3 million to \$400 million of assets under management. Prior to Altimeter Capital, Dennis was an Associate at Matrix Capital, a global hedge fund affiliated with venture capital firm Matrix Partners. At Matrix Capital, he was responsible for managing the research and investment process for \$500 million of global public equity investments. Prior to Matrix Capital, Dennis was a Financial Analyst at the Yale University Investments Office, the entity responsible for the management of the University's endowment portfolio. At Yale, Dennis managed and evaluated investments across asset classes, including hedge funds, private equity, and global public equities. Dennis received a Bachelor of Arts in Ethics, Politics & Economics from Yale University in 2005. Dennis completed the first year of the MBA Program at Harvard Business School in 2014.

**Stanford L. Leeds**

Senior Lecturer | McCombs School of Business

Sandy Leeds is a member of the Finance Department faculty at The University of Texas and President of The MBA Investment Fund, L.L.C. He teaches both graduate and undergraduate level courses, including Corporate Finance, Advanced Corporate Finance, Public Policy (Long-Term Issues in the Markets), Investments, and Portfolio Management / Security Analysis. He has a J.D. from The University of Virginia School of Law, an MBA from The University of Texas at Austin and a B.S. in Investment Management from The University of Alabama. He is a member of the Texas State Bar and holds the Chartered Financial Analyst designation.

Prior to joining the faculty, Sandy managed money for a private money management firm. He was one of four portfolio managers responsible for approximately \$1.6 billion of assets. He spent the majority of his time analyzing publicly traded companies. He also has extensive experience implementing option strategies.

Within the Austin community, he just finished a three year term on the Investment Committee for the Austin Community Foundation (managing \$100 million) and he currently serves on the Board of Trustees for The Girls' School of Austin.

**Edward Lewis**

Director of Real Estate Investments | UTIMCO  
Toigo, Chicago Booth 2004

Edward serves as a Director of Real Estate Investments for UTIMCO where he helps manage the endowments' public and private real estate portfolios. UTIMCO manages approximately \$32 billion, including \$1.75 billion in real estate exposure, in support of 18 institutions and 6 agencies in The University of Texas System and The Texas A&M University System. Edward is directly responsible for sourcing and managing new and

existing private real estate investments on a global basis with a particular focus on Europe and North America. Edward also assists with managing UTIMCO's global public REIT exposure. In addition to managing the real estate portfolio, Edward provides strategic advice on allocations to real estate for the endowments' as a whole. Prior to joining UTIMCO, Edward worked in the Capital Markets division of Jones Lang LaSalle (NYSE: JLL) in the Chicago and London offices where he focused on real estate advisory, valuation and transaction services for real estate assets. Edward began his career as a civil engineer working on commercial and residential real estate development projects. Edward received an MBA from the University of Chicago Booth School of Business and a BS in Civil Engineering from Texas A&M University.

**Onay Payne**

Director | Clarion Partners  
Toigo, Harvard 2003

Onay Payne is a Director of Clarion Partners, and the Portfolio Manager of the firm's Lion Mexico Fund ("LMF"). The Lion Mexico Fund is a \$650 million equity closed-end vehicle focused exclusively on private equity real estate investments in Mexico. Ms. Payne leads the LMF team in the articulation of its overall fund strategy, with a particular focus on risk philosophy and return expectations, sector and geographic allocation, partner diversification, and foreign currency hedging. Ms. Payne manages the fund's

restructuring and litigation activity, and also oversees the fund's asset management and acquisitions teams in their execution of each of the aforementioned strategies. LMF's investor base includes major domestic and international pension funds, as well as other significant institutional investors. The fund is fully committed.

Ms. Payne is currently a lead dancer with Bandan Koro Dallas African Dance and Drum Ensemble, which endeavors to educate and inspire through African arts and culture.

**Eduardo Repetto PhD**

Co-CEO & Co-CIO | Dimensional Fund Advisors

As co-CEO and co-CIO, Eduardo Repetto oversees day-to-day operations of the firm and directs the engineering and execution of Dimensional's investment portfolios. Eduardo is also deeply involved in the design, development, and delivery of the research that informs Dimensional's investment approach, as well as its application through portfolio management and trading. His work results in identifying and implementing relevant solutions that meet clients' needs.

Eduardo brings the statistical, scientific, and technological expertise that he gained in the field of aeronautics to the science of portfolio management. He actively contributes to the Investment Committee in the areas of investment policy, portfolio design and reporting, integrated investment solutions, the firm's tax management strategy, and consulting technology.

Eduardo received his PhD in aeronautics from the California Institute of Technology in 1998. He is the recipient of the William F. Ballhaus Prize from the California Institute of Technology for outstanding doctoral dissertation in aeronautics, and the Ernest E. Sechler Memorial Award for his teaching and research efforts there. He earned an MSc in engineering from Brown University and a diploma de honor in civil engineering from the Universidad de Buenos Aires.



### **Rosie Rios**

Treasurer of the United States

Rosie Rios serves as the 43rd Treasurer of the United States. She has direct oversight over the U.S. Mint, the Bureau of Engraving and Printing and FortKnox and is a key liaison with the Federal Reserve. In addition, the Treasurer serves as a senior advisor to the Secretary in the areas of community development and public engagement. She is especially passionate about supporting Women in Finance and issues of Main Street in the economic recovery.

Prior to her confirmation as Treasurer, Rios worked at MacFarlane Partners, where she was Managing Director of Investments. Working with MacFarlane Partners' development and global capital partners, Rios played a central role in facilitating equity transactions for large mixed-use development projects in major urban areas. In November of 2008, Rios took a leave of absence from MacFarlane Partners to serve on the Treasury/Federal Reserve Transition Team and is a graduate of Harvard University.



### **Bryan Sanchez**

Senior Vice President | Lionstone Investments  
Toigo, Harvard 2004

Bryan Sanchez is a Senior Vice President at Lionstone Investments ([www.lionstoneinvestments.com](http://www.lionstoneinvestments.com)), a real estate investment firm that manages \$3.0 billion of assets on behalf of large institutional and high net worth investors. Bryan is a Portfolio Manager for a \$200 million opportunistic fund that specializes in infill land assets and a \$250 million core-plus, separate account with a large European pension fund. Bryan's responsibilities include capital raising, sourcing investments, managing

investments and investor communications. He lives in Houston with his wife Anna Rotman and their two children – Judah (4) and Elena (2).



### **Nancy Sims**

President & CEO | Toigo Foundation

Nancy Sims brings more than 20 years of tireless service to the financial industry. Nancy has been recognized nationally as a passionate advocate for diversity with uncompromising integrity and excellence in dealing across all sectors of finance, the pension fund community, academic institutions, and thousands of diverse professionals.

With her innovative approach to program development and delivery, Toigo has been known for setting the standards in quality program delivery and engagement with its stakeholders; including high standards of governance and oversight of the non-profit operation. Through the launch of the Toigo Institute, Nancy has put forward initiatives that are designed to cultivate broader networking, career ascent, leadership development, and thought leadership among industry overall.

Prior to joining Toigo, Nancy served as a member of the Toigo Board of Directors for five years, and as a mentor to many early-stage Toigo Alumni while he was Senior Vice President and Director of Institutional Marketing for McNeil Capital, and earlier as Vice President, Client Relations for RREEF. During Nancy's career with RREEF, she also served as Director of Human Resources, launching programs for implementing greater social responsibility across a range of initiatives, from supplier diversity to minority scholarships and internships.

**Angel Stewart**

Director of Talent Management | Toigo Foundation

Angel Stewart rejoined the Toigo Foundation in June of 2011 as the Director of Talent Management. Angel, who previously served as Executive Director of the Toigo Fellowship Program from 1993 to 1998, has remained an enthusiastic supporter and friend of the organization. At her new Toigo post, she is responsible for the expansion of ToigoPRO™ (Professional Recruitment Opportunities)—our job placement platform—adding focused services on lateral talent placement and in growing the ToigoPRO team.

Before returning to Toigo, Angel led the recruiting efforts globally for the International Division of New York Life, recruiting for roles in New York, Hong Kong, Thailand, Korea, Mexico and India. Prior to that, Angel was the Vice President of Diversity at Morgan Stanley and later served as the Vice President of Investment Banking and Private Equity Experienced Hire Recruiting for Goldman Sachs. She has also worked as an independent consultant, advising finance firms in a mix of sectors on recruiting and retention strategies and providing executive search services. For the past three years, she has also served as an MBA Adjunct Faculty Advisor counseling students at UC Berkeley's Haas School of Business about careers in finance. She is based in New York City.

**Stacey Winning**

Head of Global Recruiting &amp; Development | Dimensional Fund Advisors

As the Head of Global Recruiting and Development, Stacey Winning oversees all of Dimensional's global recruiting efforts, both for campus and experienced hiring, as well as the firm's global talent development programs. Her focus is on efficiency and organization in support of hiring managers, helping them to recruit the right people as well as training and developing employees to be top performers and leaders, all with the common goal of providing a better experience for Dimensional's clients.

Prior to joining Dimensional in 2012, Stacey was Co-Head of Recruiting for Two Sigma Investments, a quantitative investment fund based in New York City. She has also led recruiting efforts at a number of larger investment banks. Stacey graduated from the University of Michigan with a BA.

**Gabrielle Zandan**

Assistant Director of MBA Career Management | McCombs School of Business

Gabrielle is in her 3rd year as an Assistant Director of MBA Career Management at the University of Texas, McCombs School of Business working with students in the Full-Time MBA Program. She primarily focuses on students entering financial services roles including Investment Banking, Investment Management, Private Equity, Venture Capital and Real Estate as well as students interested in Entrepreneurship. Previously she was in New York City where she worked as a Career Counselor at Pace University and a Mental Health Counselor at The Karen Horney Clinic. She also has prior experience working in MBA Recruiting at JPMorgan Private Bank where she was responsible for recruiting MBA candidates for both Summer and Full-Time Associate positions for the U.S., Asia and Latin America teams. Within her role at JPMorgan, she coordinated and executed all MBA recruiting efforts as well as co-managed the Summer Associate Internship Program. Gabrielle has also worked in Admissions at Connecticut College and she held an internship at Citigroup within their Human Resources Department. She has been published in two psychological journals based on research performed within environmental psychology and holds a certification in Psychodynamic Psychotherapy. She also currently serves on the Board of Directors for The Rockway Foundation which is a non-profit organization that supports education in Latin America. Gabrielle received her M.A. in Mental Health Counseling and Wellness from New York University and her B.A. in Psychology from Connecticut College.

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**Barry Zhang**

Chief Executive Officer | Quantico Energy Solutions  
Kellogg 2006

Barry Zhang currently is Chief Executive Officer of Quantico Energy Solutions, a technology company developing data analytics applications for the oil and gas industry. Previously, Barry served as Chief Executive Officer of NSI Technologies, a leading provider of hydraulic fracturing analysis and design software to major oil companies around the world. Prior to NSI, Barry worked as Investment Director for HitecVision, an oil and gas investment group headquartered in Norway. Simultaneously, he was Director of Corporate Development for Axon Energy Products AS, where he led of mergers and acquisitions for a 300-person oilfield equipment manufacturer that was one of HitecVision's portfolio companies. Prior to HitecVision and Axon, Barry was a Vice President at Kenda Capital, where he was part of the founding team that spun off a technology portfolio from Royal Dutch Shell and managed an independent venture capital fund focused on seed to growth stage oil and gas technology companies.

Barry is currently President of the Yale Club of Houston. He is a former Kauffman Fellow and an Alumni Fellow of the Robert Toigo Foundation. Barry graduated magna cum laude from Yale University with a Bachelor of Arts in Economics. In pursuing his undergraduate degree, he also studied European monetary policy at the University of Oxford. He received his MBA from Northwestern University's Kellogg School of Management.

## 2014-2015 Toigo Fellow Calendar

September 2014		
September 12-14		Fall APEX Weekend – Austin, Texas
September 25-26		Wharton: Diversity in Action 2014

October 2014		
October 2-3		MIT Sloan: Diversity Weekend
October 3		Toigo PE Fellowship First Look (NYC)
October 4		Stanford: Many Voices - Perspectives on Diversity
October 6-10		Career Webinar Series <ul style="list-style-type: none"> <li>▪ Monday, 10/6: Investment Banking</li> <li>▪ Tuesday, 10/7: Private Equity</li> <li>▪ Wednesday, 10/8: Asset Management</li> <li>▪ Thursday, 10/9: Alternative Careers in Finance</li> <li>▪ Friday, 10/10: Real Estate</li> </ul>
October 10-11		Michigan Ross: UpClose 2014 NYU Stern: Discover Stern Fall Diversity Weekend
October 15		<b>MBA Fellowship Application Launch</b>
October 17		Harvard: Prospective Student Diversity Day Darden: Diversity at Darden
October 23-24		Cornell: Johnson Mean Business

November 2014		
November 1		Columbia: Diversity Matters
November 3		Yale: Explore Diversity Day
November 6-9		Tuck: Leading with Diversity Perspectives Kellogg: Diversity Weekend
November 14-15		Texas McCombs: MBA Diversity Forum
November 20-23		Duke: MBA Workshop for Minority Applicants
November 23-24		T. Rowe Price Weekend

December 2014		
December 10		New York MBA Fellowship Info Session (tentative)

January 2015		
January 11		Los Angeles MBA Fellowship Info Session (tentative)
January 16		Buddy Dinner Receipts Submission Deadline
January 29-30		Rice: Preview Jones Diversity

February 2015		
February 4		Chicago MBA Fellowship Info Session (tentative)
February 22		Bay Area MBA Fellowship Info Session (tentative)

March 2015		
March 31		<b>MBA Fellowship Application Deadline</b>

April 2015		
April 10 -12		Spring APEX Weekend – Location TBD

May 2015		
May 3-7		MBA Catapult – New York

June 2015		
June 11		Toigo Gala – NY

	<b>Mandatory</b>
	<b>Toigo Outreach Opportunity (School Captains)</b>
	<b>Toigo Event</b>
	<b>Sponsor Event</b>



## School Captains

### Chicago Booth

2015 – Kiesean Riddick

2016 – Jaime Rocha

### Columbia

2015 – Yumna Cheema

2016 – Ernesto Padron

### Cornell

2015 – Joshua Butler

2016 – Zachary Raynor

### Duke Fuqua

2015 – Jorge Soriano

2016 – Nicole Melwood

### Harvard

2015 – Daniel Ramirez

2016 – Clifford Foster

### Michigan Ross

2015 – Yi Yang

2016 – Cassandra Duchard

### MIT

2016 – Reegy Laloi

### NYU Stern

2015 - Jonathan Le

### Kellogg

2015 – Daniel Espinosa

2016 – Jamie Lu

### Rice

2016 – Theodore Williams

### Stanford

2015 – Jared Murphy

2016 – Julia Duzon

### Texas McCombs

2016 – Kevin Johnson

### Tuck

2015 – Ruben Cotti-Lowell

2016 – Emeka Kanu

### UC Berkeley Haas

2016 – Michael Young

### UCLA Anderson

2016 – Sean Pompa

### UVA Darden

2015 – Ralph Derek Rey

### Wharton

2015 – Anthony Hardy

2016 – Isabel Ramberg

### Yale University

2015 – Hugo Santillan

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## **Buddy Dinner Program**

If you're searching for an escape from the demands of your rigorous course schedule, let the Buddy Dinner Program act as a pleasant break from your studies. As the school year gets underway, we would like to encourage interaction between 1<sup>st</sup> and 2<sup>nd</sup> year Fellows at each school by facilitating informal Buddy Dinners. Since you know the local hot spots best, we will leave the details of planning up to the Fellows. *Dinners will be happily reimbursed by the Foundation with a monetary cap of \$25.00 per student.*

Traditionally, 2<sup>nd</sup> year Fellows have taken the helm in regards to the coordination of these events with the assistance of School Captains. We recommend that you begin an open dialogue regarding the dates, and locations of the Buddy Dinner events in order to accommodate as many Fellow participants as possible.

Please be aware that a reimbursement form is included in the Fall APEX Training Fellow Book and should be submitted back to us, **accompanied by original receipts related to the dinner**, by **January 16, 2015**. Please note that the Foundation will not reimburse the purchase of alcohol. Reimbursement forms can be submitted for either groups, or individuals. We recommend that the Buddy Dinner take place prior to Thanksgiving Break, as the later you wait to schedule these fun events the more difficult it becomes to carve out ample time.

Take full advantage of this Toigo subsidized event, in order to strengthen the Toigo family as well as the Toigo community at your respective institution. This can also be used as a stepping stone, in order to plan future civic service, and mentoring projects. Have fun, and strengthen the support system that makes the Toigo Family so uniquely special.

## Toigo Fellow Sector Listing

### Asset Management

**2015**

Mario Antwine  
Daniel Espinosa  
Anthony Hardy  
Jasper Wright

### Business Development

**2016**

Daniel Rojas

### Corporate Finance

**2015**

George Wilson II

**2016**

Jorge Garcia  
Jennifer Potter  
Jordan Smith  
Emeka Kanu

### Endowment Management

**2015**

Chidozie Ugwumba

**2016**

Jamie Lu

### Equity Research

**2015**

Jared Murphy

### Hedge Fund

**2015**

Lorenzo Brooks  
Tracey Chu

**2016**

Daniel Asamoto  
William Im  
Stephen Lin

### Investment Banking

**2015**

Patrice Azi  
Joshua Butler  
Craig Carter  
Yumna Cheema  
Ruben Cotti-Lowell  
Leah Endalkatchew  
Richard Hemmings  
Kenny Hernandez  
Roberto Hernandez  
Antonio Key  
Ryan Lewis  
Adia Matthews  
Shelton McCullough  
Robert Ramirez  
Ralph Derek Rey

**2016**

Ramsey Baker  
Jackie Chang  
Dominique Collins  
Elisse Douglass  
Julia Duzon  
Stephane Essama  
Oluwafemi Faoye  
Sherwin Jiang  
Kevin Johnson  
Alexander King  
Reegy Laloi  
Austin Murray  
Jose Perez  
Zachary Raynor  
Brian Rikuda  
Shawna Strayhorn  
Theodore Williams  
Ramon Zepeda

### Investment Management

**2015**

Krystal Barker  
Brandon Hoffman  
Jonathan Le  
Kieseane Riddick  
Jorge Soriano

**2016**

Edward Jean-Louis  
Rolando Manzo  
Sean Pompa  
Amy Wang



## Toigo Fellow Sector Listing

### Private Equity

#### 2015

Christopher Malone  
Alexis Maule  
Daniel Ramirez  
Phillip Robinson  
Hugo Santillan  
Travis Sherman  
Selena Singleton  
Yi Yang

#### 2016

Joseph Blount  
Jordan Carter  
Leland Carter  
Antoine Grant  
Opal Joshi  
Jonathan Kelemen  
Merv Merzoug  
Juan Moncayo  
Gerrel Olivier  
Ernesto Padron  
Daniel Palacios  
Justin Saeheng  
Saron Tesfalul  
Britney Winters  
Kenneth Yearwood

### Private Wealth Management

#### 2016

Jaime Rocha

### Public Finance

#### 2015

Cindy Rivera

#### 2016

Hassan Wilson

### Real Estate

#### 2015

Juan Agudelo  
Bria Bailey  
Kilian Toms

#### 2016

Jade Auzenne  
Adler Prioly  
Allyson Randolph  
Clifford Foster

### Sales & Trading

#### 2016

Nicole Melwood

### Social Impact Investment

#### 2015

Tricia Torres

#### 2016

Martin Fernandez  
Ricardo Salinas  
Ritchy Philoctete

### Venture Capital

#### 2015

Matthew Cano  
Christian Okoye

#### 2016

Lisa Cuesta  
Cassandra Duchard  
Trevor Fay  
Isabel Ramberg  
Shani Taylor  
Michael Young

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### Class of 2015

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