**Barron's Diversity Summit 2015 bios – Wolcott Wheeler**

**Andrew Ramos**

**Edward Jones**

Andrew is a limited partner with Edward Jones, which he joined in 2006. He is in the firms’ top 25% for client service excellence. In 2014, he qualified for the Edward Jones Managing Partner’s Conference, an honor reserved for the top 350 of more than 13,000 financial advisors. A graduate of the U.S. Military Academy at West Point, he served six years of active duty before starting with Edward Jones in 2002 in Prairie Village, Kansas. During his time with Edward Jones, he has been deployed by the U.S. Army overseas twice, with each deployment lasting for one year. He still serves in the U.S. Army Reserves as a Lieutenant Colonel with 23 years of military service. He holds the Accredited Asset Management Specialist professional designation.

**Aubrey Lee, Jr.**

**Merrill Lynch Wealth Management**

Aubrey is the senior partner of the Aubrey W. Lee, Jr. and Julius Readus Group at Merrill Lynch; he joined Merrill Lynch in 1987. He is also a Senior Resident Director, a First Vice President, a Wealth Management Advisor, and a Portfolio Manager in the Personal Investment Advisory (PIA) Program. His team utilizes a comprehensive wealth management approach to grow, manage and preserve wealth for an exclusive group of affluent families, business owners and non-profit organizations. His team’s approach is to gather data, identify goals and design a plan to meet overall client objectives, then employ a sound, disciplined investment approach delivered in an organized and efficient fashion. He currently serves on the African-American Leadership Council at Merrill Lynch, a committee that provides insight and ideas to Merrill Lynch senior management regarding diversity.

**Margaret Archer**

**Wells Fargo Advisors**

Margaret is a Financial Advisor with Wells Fargo Advisors in Atlanta, Georgia, where she specializes in investment planning and strategies for her clients. Wells Fargo Advisors has recognized her as a Premier Advisor. She specializes in retirement income and investment planning. She also holds the Accredited Domestic Partnership Advisor (ADPA) designation and advises same-gender families on investment planning. A popular speaker, she has addressed a wide variety of audiences, including *The Advocate’s* “Money Minute Web” video series. She has been quoted in sources such as the *Financial Times*, *The Christian Science Monitor*, and the National Resource Center on LGBT Aging, among others. Currently, she serves as a member of the LGBT Steering Committee for Wells Fargo Advisors and as an ADPA Conference Leader. In 2014, Wells Fargo named her an Enterprise Diversity and Inclusion Champion. She received her B.A. in Finance from Illinois State University.

**G. Scott Budge, Ph.D.**

**RayLign Advisory**

Scott is a Managing Director and Relationship Manager at RayLign Advisory. An expert in the dynamics of wealthy families, he has worked extensively as a developer and educator of wealth advisors, which is the focus of his recent book, *The New Financial Advisor: Strategies for Successful Family Wealth Management*. Prior to joining RayLign, he founded two companies that delivered Internet-based management services to single- and multi-family offices and financial advisors in the U.S. and Canada. At SEI Investments, he was a Senior Vice President. The author of several wealth management articles, he has served on the editorial board of *The Family Business Review* and is on the Family Business Committee of the editorial board of *Trusts & Estates* magazine. A Fellow at the Family Firm Institute and a founding member of the Money and Family Life Project at the Ackerman Institute for the Family, he holds a Ph.D. in Psychology from New York University.

**Lauris Lambergs**

**Raylor Asset Management Group**

Lauris is a Managing Director, Business Development at the Raylor Asset Management Group, where he is responsible for Raylor’s business development. Previously, he was a Director at StrategicPoint Investment Advisors, one of New England’s leading wealth managers. Earlier, he served clients ranging from institutions to independents as Vice President, Global Business Development at AllianceBernstein and as Vice President, Sales Director at Columbia Management. He started his career as a Consultant with Deloitte and PricewaterhouseCoopers. He holds the Certified Investment Management Analyst designation, as well as the FINRA Series 3 & 65 licenses. He earned his B.A. in French and Political Science from Duke University and his M.B.A. from the Riga Business School in Riga, Latvia. He speaks five languages to varying degrees of fluency.

**Gregory Rogers**

**RayLign Advisory**

Greg is the Founder and a Managing Partner of RayLign Advisory, which he founded in 2004 to provide transition management consulting services to family businesses, family offices and financially complex families. He is also Founder and Managing Partner of Raylor, an affiliated asset management entity, where he is responsible for strategy and business management. Raylor provides managed futures and global equity ETF portfolios for high-net-worth clients. Previously, he served as Executive Vice President and Chief Operating Officer at publicly-traded asset manager John A. Levin & Co. and as Managing Director at leading institutional investment consultant, RogersCasey, founded by his father Stephen Rogers. He has taught at the IPI Wharton Private Wealth Program and the University of Connecticut concerning the perpetuation of intergenerational family wealth. He has an M.B.A. from New York University’s Stern School and a B.A. in Economics and Organizational Behavior from Brown University.

**Carla Harris**

**Morgan Stanley**

Carla is a Vice Chairman, Global Wealth Management, a Managing Director, and a Senior Client Advisor at Morgan Stanley, responsible for increasing client connectivity and penetration to enhance revenue generation across the firm. In August 2013, she was appointed by President Barack Obama to chair the National Women’s Business Council. She enjoys a second career a gospel singer and released her third CD, *Unceasing Praise,* in 2011. Her second CD, *Joy Is Waiting,* was featured on *BET Nightly News.* Her first CD, *Carla’s First Christmas,* was a bestseller. She is also the author of *Strategize to Win* and *Expect to Win*.She has been ranked by *Fortune, Black Enterprise, Essence, Ebony* and others as a both leading woman and a prominent black executive in the U.S. business world. She received an M.B.A. from Harvard Business School and an A.B. *magna cum laude* in economics from Harvard.

**Eric Sheikowitz**

**Speaker, Coach, Consultant**

Eric is a highly successful, in-demand speaker, coach and consultant with over 20 years’ experience. For over eight years, he has been coaching and consulting with some of the top financial advisors and teams in the industry and has presented at workshops and conferences to thousands of advisors. He began his career at Republic National Bank, servicing high-net-worth individuals and commodities clients. Most recently, he was a Director and Manager for a Big Four audit and advisory firm, where he led a team in developing and executing marketing and client service programs. He holds a Bachelor’s degree from the University of Rhode Island and a Master’s Degree from Long Island University. He received coach training from a leader of the modern coaching movement. A member of NFTE, the Network for Teaching Entrepreneurship, he is a regular contributor to *Financial Planning, On Wall Street* and other industry publications. He can be seen regularly on Advisor TV.

**John Escario**

**T. Rowe Price**

John is a manager in the Investment Product Group in the T. Rowe Price U.S. Investment Services (USIS) division. He serves as a general manager in conducting product research, developing insights and services to assist financial intermediaries and helping these clients understand how the firm’s investment offerings fit within their platforms and asset allocation models. Before joining T. Rowe Price in 2014, he was a senior investment strategist for the Vanguard Group and head of its exchange-traded fund Portfolio Analytics Service. Prior to that, he served as a senior portfolio manager with Rydex SGI (now Guggenheim Investments). He has over 20 years' experience in the investment world. He earned a B.A. in history from Virginia Tech. A Series 63, 7, and 24 registered representative, he earned the Chartered Financial Analyst (CFA) designation and is the past president of the CFA Society of Washington, D.C.

**Fran Skinner**

**AUM Partners**

Fran is co-founder of AUM Partners, a Chicago-based management consulting firm that helps investment leaders maximize the performance of their greatest assets—their people. She is also an Independent Corporate Director, Chair of the Compensation Committee, and Audit Committee member for Diamond Hill Investment Group, a publicly-traded, independent investment advisory firm based in Columbus, OH. She has more than 25 years of leadership and consulting experience in the financial services industry, including positions at Allstate Investments, LLC, Mellon Bank and as an independent consultant. She focuses on strategic planning, cash management, competitive compensation, succession planning, designing and monitoring investment performance goals, investment accounting and operations. She specializes in designing and delivering industry- and firm-specific research and diagnostics, including measuring firm culture, leadership effectiveness, employee engagement and individual performance. A CFA and CPA, she has an M.B.A. in Finance and Marketing from the University of Illinois – Chicago and is a Certified Enneagram Instructor.

**Jesse Walton, Jr.**

**Morgan Stanley Wealth Management**

Jesse is a First Vice President with Morgan Stanley Wealth Management in Alpharetta, GA. His team, The Walton Group, specializes in assisting corporate professionals, executives and private institutions with comprehensive wealth management solutions and investment advisory services. The October 2009 issue of *Atlanta* magazine cited him for its Five Star Wealth Manager Award for 2009. In the October 2011issue of *Georgia Trends* magazine, he was recognized as a Top 40 Under 40 Award Honoree for Emerging Leaders in Business, Politics, Arts, Education and Non-Profit in Georgia. He is the Co-Chair of the Diversity Council for the Morgan Stanley Atlanta Perimeter Complex. He is a Certified Financial Planner, a Certified Private Wealth Advisor, Certified Investment Management Analyst, and a Certified Private Wealth Advisor. In 2005, he received an Executive Certificate in Financial Planning from Duke University. He graduated from Howard University with a B.B.A. degree in International Business and earned an M.S.E. degree from Georgia State University.

**Joseph Anderson III**

**Prudential**

Joe is a Director in Prudential Annuities’ Advanced Planning Group, where he works extensively with financial professionals, CPAs and attorneys to help them understand the complexities and opportunities of retirement planning, income distribution and estate planning. Prior to joining Prudential Annuities, he spent eight years at Genworth Financial as a competitive intelligence and market analyst. In his three years at Allstate Life Insurance Company, he developed and managed the competitive intelligence desk and conducted market research. With 17 years of experience in the financial services industry, he is a frequently requested speaker at broker/dealer and other national conferences. He has authored articles for numerous industry publications and has developed continuing education curriculum and marketing materials. He received his B.A. from Andrews University and an M.B.A. in International Management from University of Maryland. He holds FINRA Series 6, 26 and 63 registrations, as well as Texas Life, Health and Variable Annuity licenses.

**John Rogers, Jr.**

**Ariel Investments**

John is Founder, Chairman, Chief Executive Officer and Chief Investment Officer of Ariel Investments, which offers six no-load mutual funds for individual investors and defined contribution plans and separately managed accounts for institutions and high-net-worth individuals. Early in his career, he was selected as Co-Mutual Fund Manager of the Year by Sylvia Porter’s *Personal Finance* magazine and cited as an All-Star Mutual Fund Manager by *USA TODAY*. He is profiled in the book *The World’s 99 Greatest Investors* by Magnus Angenfelt. Regularly featured and quoted in a wide variety of broadcast and print publications, he is a contributing columnist to *Forbes*. Following the election of President Obama, he served as co-chair for the Presidential Inaugural Committee 2009. Today, he chairs the President’s Advisory Council on Financial Capability for Young Americans. He majored in Economics at Princeton University, and in 2008, he was awarded Princeton University’s highest honor, the Woodrow Wilson Award.

**Kevin Pasha**

**Morgan Stanley**

Kevin is the Complex Business Development Manager, Vice President, for Morgan Stanley’s Palo Alto/Hawaii Complex. He is presently based out of Silicon Valley. He is a Marshall Memorial Fellow, having represented the United States at the European Union and Eastern Europe with a focus on banking stability, NATO expansion, and green technology. He was recently named a Young Leader by the Council for the United States and Italy. A member of the Houston Committee on Foreign Relations, an affiliate of the Council on Foreign Relations, he has a bachelor’s degree from Baylor University as a University Scholar and a master’s degree in Management from Harvard University with the Dean’s List distinction.

**Lauris Lambergs**

**RayLign**

Lauris is responsible for the business development of RayLign, which provides partner firms with best practices in business development, client service and business management. Previously, he was Director at StrategicPoint Investment Advisors, one of New England’s leading wealth managers, where he was responsible for business development. Earlier, he served clients ranging from institutions to independents as Vice President, Global Business Development at AllianceBernstein and as Vice President, Sales Director at Columbia Management. He started his career as a Consultant with Deloitte and PricewaterhouseCoopers. He holds the Certified Investment Management Analyst (CIMA) designation, as well as the FINRA Series 3 and 65 licenses. He earned his B.A. in French and Political Science from Duke University and his M.B.A. from the Riga Business School in Riga, Latvia. He speaks five languages to varying degrees of fluency.

**Marie Dzanis**

**Northern Trust Asset Management**

Marie is Senior Vice President and Head of Intermediary Sales at Northern Trust Asset Management. She is responsible for establishing Northern Trust’s presence in the intermediary market, recruiting and retaining talented sales professionals and developing significant relationships across industry channels. She has more than 25 years of industry experience. Prior to joining Northern Trust in June 2011, she held executive and leadership positions at iShares/Blackrock, JPMorgan Asset Management, and Smith Barney. She has been a featured speaker at many high-level industry events and interviewed by leading financial media on a variety of investment topics. She is a graduate of the Catholic University of America with a B.A. in Political Theory, the Stanford University Executive Education Program, and the Chicago Booth School of Business Executive Education Program. She holds the CIMA certification and holds FINRA Series 7, 24 & 66 Licenses.

**Michael Silver**

**Speaker, Coach, Consultant**

Michael has been coaching some of the most successful advisory practices in the industry for over eight years. For over 19 years, he has worked with financial services firms and financial professionals, both individually and in teams. He has presented at workshops and conferences to thousands of advisors around the country. Previously he was a financial advisor with Prudential Securities, Wachovia Securities and Ryan Beck, where he learned first-hand the power of creative networking, referral programs and relationship management. He received a Bachelor of Science degree in Finance from Ithaca College and holds a Certification in Organizational and Executive Coaching from New York University. He is a member of NFTE, the Network for Teaching Entrepreneurship, in New York City.

**Ryan Mizushima**

**Edward Jones**

Ryan is one of the Ted Jones Coaching Program’s Head Coaches with Edward Jones and has served as a field trainer, Ted Jones Coach, and a recruiting team member. He began his Edward Jones career in his hometown, Grand Junction, Colorado, in 2005. He has qualified multiple times for the firm’s Managing Partners Conference (MPC) award, where the top 350 advisors are invited each year according to their production achievement. In 2012 and 2014, he qualified for the Drucker Conference, named after the late Peter Drucker, where the top 50 advisors are invited based in their production and Customer Service Excellence (CSE) scores. The Drucker Award is considered the most prestigious at Edward Jones. He graduated from Western State Colorado University in Gunnison, Colorado.

**Reshma Saujani**

**Girls Who Code**

Reshma is the Founder and CEO of Girls Who Code, a national non-profit organization working to close the gender gap in technology and prepare young women for jobs of the future. In her new book, *Women Who Don't Wait in Line*, she advocates a new model of female leadership focused on embracing risk and failure, promoting mentorship and sponsorship, and boldly charting one’s own course—personally and professionally. After years of working as an attorney and supporting the Democratic Party as an activist and fundraiser, she left her private sector career behind and became the first Indian-American woman in the country to run for U.S. Congress. Later she became Deputy Public Advocate of New York City and most recently ran a spirited campaign for Public Advocate. She is a graduate of the University of Illinois, Harvard’s Kennedy School of Government, and Yale Law School.

**Shundrawn Thomas**

**Northern Trust**

Shundrawn is Executive Vice President, Head of Funds and Managed Accounts Group at Northern Trust. He oversees the development, management and distribution of Northern Funds, Northern Institutional Funds and FlexShares Exchange Traded Funds. Previously, he served as President and Chief Executive of Northern Trust Securities, Inc., a wholly-owned subsidiary of Northern Trust Corporation. As Head of Corporate Strategy and a direct report to the CEO, he supported executive management with key strategic planning initiatives. Prior to joining Northern Trust, he served as a vice president for Goldman Sachs and held positions in sales, trading and research with Morgan Stanley. He received a B.S. degree in accounting from Florida A&M University and an M.B.A. degree from the University of Chicago Booth School of Business. He currently holds FINRA series 7, 63 and 24 securities licenses.

**Tristan Walker**

**Walker & Company**

Tristan is Founder and CEO of Walker & Company. Before Walker & Company, he was an Entrepreneur-In-Residence at the venture capital firm, Andreessen Horowitz. Prior to this experience, he was the Director of Business Development for the mobile search application, Foursquare, where he managed integrations with large brands and media entities such as American Express, *The New York Times*, CNN, MTV, Starwood Hotels & Resorts and Starbucks. He has been included in *Fortune’s* 40 Under 40, *The Root’s* 100, *EBONY’s* 100 Most Powerful people list, *Vanity Fair’s* The Next Establishment, *The Hollywood Reporter’s* Digital Power 50 and *Black Enterprise’s* 40 Next. He is also the founder and chairman of CODE2040, a nonprofit organization that creates pathways to educational, professional, and entrepreneurial success in technology for underrepresented minorities, with a specific focus on blacks and Latinos. He holds an M.B.A. from Stanford University’s Graduate School of Business.

**Dr. Quincy Krosby**

**Prudential Annuities**

Quincy is the Chief Market Strategist for Prudential Annuities and a member of the investment management group for the annuities division, where she provides perspective on the global macro-economic environment and financial markets. Previously, she was the chief investment strategist for The Hartford and global investment strategist for Deutsche Bank Asset Management. She also worked in the global markets groups at Credit Suisse and ING Barings. Earlier in her career, she was a U.S. diplomat, serving in Washington and United States embassies abroad, including a posting as Energy Attaché at the U.S. Embassy in London. In addition to numerous assignments at the U.S. Department of State, she served as Assistant Secretary of Commerce and represented the United States at the International Monetary Fund. She is frequently quoted in the financial press and on business television. She studied at the London School of Economics, where she earned her master's and doctoral degrees.

**Susana Lugones**

**Merrill Lynch Wealth Management**

Susana is a First Vice President and Senior Financial Advisor with the Merrill Lynch Wealth Management Group in Princeton, NJ. She brings over 24 years of experience in the financial services industry to her practice and has been with Merrill Lynch since 2002. She works with a wide range of clients, from individuals and families to small business owners and corporate executives. In selecting investment strategies, she prefers to use a collaborative model to help clients achieve their goals. This approach offers clients the opportunity to take full advantage of experts in other Merrill Lynch specialties, such as Trust & Estate, Insurance, Lending, Banking and Corporate Retirement Planning, all with the guidance of a trusted advisor. She understands that clients seek professionals willing to partner and work closely with their other advisors, including tax accountants and attorneys, to help them achieve their total wealth management needs.

**Thomas Seabron, Jr.**

**Morgan Stanley**

Thomas is a Senior Vice President and Financial Advisor with Morgan Stanley’s Wealth Management division. He received the “Citigroup Quarter Century Club” and “Smith Barney 30 Year Custom Crystal” Awards in acknowledgement of his years of service with both companies. He offers serious investors 33 years of experience and expert financial guidance to help determine and meet investment objectives, and he is devoted to forming dedicated client relationships. A member of the National Football League Alumni Association, Detroit Chapter, he played professionally with the San Francisco 49ers and the St. Louis Cardinals. He is a Founding Member of the Detroit Chapter of the National Association of Securities Professionals and a Registered Representative of the National Association of Securities Dealers (FINRA). He is a graduate of the University of Michigan, where he was a football team member and four-year varsity letterman.

**Catherine Burgess**

**Morgan Stanley**

Cathy is a Financial Advisor with Morgan Stanley, where she focuses on her clients and expands her book of business across multiple niche areas. She offers comprehensive wealth management solutions to individual clients, families, business owners and non-profit organizations primarily in New England, but throughout the U.S. as well. As a part of Morgan Stanley’s Regional Diversity Council in the New England Region, she helped create what is today the Women’s Greater Boston Network and the New England LGBTQ Council. In addition to fostering advancement, networking, and education in these areas, she is also a member of the Women Advisor Network (WAN) Advisory Board in Greater Boston. Prior to Morgan Stanley, she was a Regional Vice President both for Evergreen Investments and Dreyfus Funds. A Certified Financial Planner, she received the Retirement Income Certified Professional Designation from the American College. She is a graduate of Boston College.