



2023 Annual Conference

Treasurers and Insurance Roundtable



CONFERENCE PROGRAM

Focusing on Fundamentals

June 26 - 28
Washington, D.C.

www.treasurersroundtable.org

2023 Annual Conference Treasurers and Insurance Roundtable

June 26 - 28 | Washington, D.C.

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2023 Annual Conference Treasurers and Insurance Roundtable

June 26 - 28 | Washington, D.C.

June 26, 2023

Greetings honored guests and esteemed colleagues,

We warmly welcome you to the 2023 Treasurers and Insurance Roundtable. The theme for 2023 is *Focusing on Fundamentals*. The conference was crafted to provide a world-class experience with new and intellectual insights by presenters of the highest caliber from government, practitioners, think tanks, and providers. Meeting in-person promises to foster strategic collaboration, networking and interaction to move the iNGO treasury and insurance industry forward.

We are excited to bring you an excellent program:

- 21 engaging sessions over the three days
- An inaugural treasury educational session
- Leaders of global entities participating
- Various lunch topic tables discussions to enable participants delve further on topics of shared interest
- Fifteen Sponsor tables to enable interactions on services and expertise that make our work possible
- CTP/CCM and FP&A recertification credits available through coordination with the Association for Finance Professionals (AFP)
- Two sponsored happy hour events for extended networking opportunities
- Access to conference recordings following the conference

We are grateful to our speakers, staff, and volunteers who enable this fantastic program.

We would like to express our appreciation to the sponsoring institutions for providing their generous financial support, which makes this event and provision of some scholarships possible, namely:

Platinum Sponsors - Absa, Citi, Crown Agents Bank, Ecobank, Kyriba, Standard Bank, Standard Chartered Bank, and StoneX Payments

Official Sponsors – AHT Insurance, BDO, Blaylock Van, LLC, Corpay, Marsh & McLennan, Mercer, McGriff Insurance, and Paycode

Doors will open at 8:00 AM EDT. The programs begin each day at 8:30 AM EDT.

Our thanks go to each of you for attending our Roundtable from inception to date. You are our greatest asset enabling the Treasurers Roundtable grow to its 12th year today while the Insurance Roundtable its fourth year. Here is to our continued engagement and proactiveness in the Roundtable.

Treasurers and Insurance Roundtable Executive Committee

Moojan Behziz – <i>Bill & Melinda Gates Foundation</i>	Tina Cameron – <i>World Vision International</i>
Karen Kearney – <i>Stanford University</i>	Stella Kilonzo – <i>World Vision International</i>
Sassan Parandeh – <i>ChildFund International</i>	Steve Perry – <i>Catholic Relief Services</i>
Kathryn Powers – <i>World Vision International</i>	Laura Schauble – <i>ACDI / VOCA</i>
Tobias Thiessen – <i>The Global Fund</i>	Rich Yamashita – <i>UCLA</i>



Agenda

2023 ANNUAL CONFERENCE OF THE TREASURERS AND INSURANCE ROUNDTABLE

Monday

JUNE 26, 2023

Treasurers Roundtable

8:00 AM | Doors Open

8:30 AM | Welcome

Sassan Parandeh | Global Treasurer | *ChildFund International*

8:35 AM | Panel Discussion

Global Banking: Navigating Solutions With Your Financial Providers

Ashwin Ramji* | Global Assistant Treasurer | *World Vision International*

Duarte Pedreira | Head of International Development Organisations | *Crown Agents Bank*

Chris Tynan | Vice President, Development Organizations - Banking, Capital Markets and Advisory | *Citi*

9:20 AM | Break

9:30 AM | Presentation

Banking in a Frontier Market

Joseph Carasso | Chief Executive Officer | *Afghanistan International Bank*

10:05 AM | Keynote Address

Facilitating Financial Access in an Interconnected World

Brian E. Nelson | Under Secretary for Terrorism and Financial Intelligence | *U.S. Department of Treasury*

10:40 AM | Break

Need Help?

All questions and requests can be emailed to info@treasurersroundtable.org.

10:55 AM | Panel Discussion

New OFAC Baseline General Licenses: Progress on Bank De-Risking

Karen Hom* | Managing Director, Transaction Banking Team Lead - Corporate, Commercial, and Institutional Banking | *Standard Chartered Bank*

Leslie Archambeault | Managing Director, Humanitarian Policy | *Save the Children*

Patrick Hu | Senior Policy Advisor, Office of Terrorist Financing and Financial Crimes (TFFC) | *U.S. Department of Treasury*

Robert Peri | Managing Director | Sanctions Compliance | *Citi*

Julien Tunney | Policy Advisor, Office of Foreign Assets Control (OFAC) | *U.S. Department of Treasury*

11:45 AM | Treasurers Round Robin

12:30 PM | Lunch

1:30 PM | Panel Discussion

Innovations in the Ecosystem of Payments

Tom Hunt* | Director of Treasury Services and Payments | *Association for Financial Professionals*

Jim Colassano | Senior Vice President, Product Development and Strategy | *The Clearing House*

Amit Sahani | Global Head of Data | *StoneX*

Bob Stark | Global Head of Market Strategy | *Kyriba*

2:15 PM | Break

2:30 PM | Presentation

Fundamentals of Investment Management

Peter Briggs | Senior Portfolio Manager, Strategy and Sustainability Team | *World Bank*

3:15 PM | Closing Remarks

Please join us for Happy Hour hosted by Citi and Crown Agents Bank



Agenda

2023 ANNUAL CONFERENCE OF THE TREASURERS AND INSURANCE ROUNDTABLE

Tuesday JUNE 27, 2023 Treasurers and Insurance Roundtable

8:00 AM | Doors Open

8:30 AM | Panel Discussion

Africa in Context: What to Make of 2023 (Already)!

Nyagaka Ongeru* | Head of Corporate Strategic Advisory | *Blaylock Van, LLC*
Sebastian Ashong-Katai | Group Head, Financial Institutions and International Organisations | *Ecobank Transnational Inc*
Godfrey Mwanza | Senior Economist, Africa Regions FIC Research | *Standard Bank Group*

9:15 AM | Panel Discussion

Mind the Gap: Are You Connected?

Steve Perry | Global Treasurer | *Catholic Relief Services*
Jennifer Poidatz | Vice President, Humanitarian Response | *Catholic Relief Services*
Brenda Reynolds | Cash Manager, Global Treasury | *Catholic Relief Services*

10:00 AM | Break

10:30 AM | Presentation

Geopolitical Risk in 2023 and Potential Financial Impacts to Aid Agencies

Gayle Jacobs | Senior Vice President, Political Risk & Structured Credit | *Marsh USA LLC*

11:15 AM | Conversations

Cultivating Your Greatest Assets: People

Karen Kearney | Treasurer & Global Business Services | *Stanford University*
Richard Yamashita | Treasurer | *UCLA*

12:00 PM | Lunch

1:00 PM | Conversations

Lessons in Leadership

Kathryn Powers* | Head of Treasury | *World Vision International*
Mizinga Melu | Managing Director and Chief Executive Officer | *Absa Bank Zambia PLC*

1:30 PM | Panel Discussion

Managing and Responding to Fraud in a Rapidly Changing Environment

Sly Atayee* | Senior Manager, Industry Specialty Services | *BDO*
David Clark | Managing Director, Industry Specialty Services | *BDO*
Cassie Kaplan | Senior Advisor | *Save the Children US*
Yukari Komuro | Director of Compliance and Investigations | *FHI 360*

2:30 PM | Break

2:45 PM | Conversations

Reducing Risk by Cleaning House

Warren Fischl | Senior Vice President, Property and Casualty Insurance | *McGriff Insurance*
Sassan Parandeh | Global Treasurer | *ChildFund International*

3:30PM | Closing Remarks

Please join us for Happy Hour hosted by Corpay

Agenda

2023 ANNUAL CONFERENCE OF THE TREASURERS AND INSURANCE ROUNDTABLE

Wednesday JUNE 28, 2023 Insurance Roundtable

8:00 AM | Doors Open

8:30 AM | Presentation

Navigating the Intersection of Insurance and Risk Management

Laura Schauble | Vice President, Risk and Security | *ACDI/VOCA*

9:15 AM | Panel Discussion

Duty of Care: The Collaboration Between Insurance Carriers, Response Providers and Crisis Management

Joe Gleason | Director, Global Risk Management | *AHT Insurance*

Mike Kelly | Partner | *AHT Insurance*

Anthony Walker | Senior Director, Global Security | *University Research Co. (URC)*

10:00 AM | Break

10:30 AM | Presentation

2023 and Beyond... Managing Through the Uncertainty of the Insurance Market

Warren Fischi | Senior Vice President, Property and Casualty Insurance | *McGriff Insurance*

Helpful Notes

Moderators are noted with an (*)

CTP and FPAC recertification credits by the Association for Financial Professionals available

Agenda subject to change

11:15 AM | Insurance Round Robin

12:00 PM | Lunch

1:00 PM | Panel Discussion

Integrating Risk Management into an Organization: A Practical Approach

Laura Schauble* | Vice President, Risk and Security | *ACDI/VOCA*

Michael Liebowitz | Senior Director of Enterprise Risk Management and Insurance | *NYU*

Lisa Oliveri | Director of Global Risk Management, Security, and Operations | *National Democratic Institute*

1:45 PM | Break

2:00 PM | Presentation

Professional / Management Liability: Opportunities and Challenges to Maximize Coverage

Ruth Kochenderfer | Managing Director | *Marsh*

2:45 PM | Panel Discussion

Contractual Risk Transfer: Getting It Right

Ken Eye* | Director, Industry Spec Services | *BDO*

Charmaine Davis | Senior Vice President, SEZ Corporate Segment | *Marsh*

Mike Kelly | Partner | *AHT Insurance*

Rusty Smith | Senior Vice President | *McGriff Insurance*

3:30 PM | Closing Remarks





Agenda

2023 ANNUAL CONFERENCE OF THE TREASURERS AND INSURANCE ROUNDTABLE

Wednesday

JUNE 28, 2023

Hours: 9:00 AM – 3:00 PM

Light breakfast, lunch and refreshments will be served

10:45 AM | Session 2

Foreign Exchange: Strategy for Success

- Identifying sources of foreign exchange risk
- Choosing the best currency for funding
- Strategies for managing foreign exchange volatility
- Selecting counterparties
- Options for executing trades
- Elements of an FX policy

2:10 PM | Session 4

Business Continuity: A Formal Plan

- The need for a formal business continuity plan
- The key elements of a business continuity
- Understanding how business continuity extends beyond processes; it includes people
- A systematic plan for continuing education of staff to stay knowledgeable about existing and new Treasury products & services

Treasury Education Courses

Sponsored by Crown Agents Bank

9:00 AM | Session 1

Bank Management: How to Achieve Win-Win Bank Relationships

- Selecting a bank for your business through RFI/RFP processes
- Achieving a trusted and transparent banking relationship
- Navigating KYC
- Ascertaining where the bank can provide the best value and support to match the organization's needs

1:00 PM | Session 3

Counterparty Risk: Protecting Your Organization

- Identifying an organization's exposure to counter party risk; cash/deposits, foreign exchange contracts, credit utilization, legal contracts
- A framework for managing counterparty risk for financial and non-financial institutions (i.e. money transfer agents, vendors, and hawalas)
- Creating counterparty risk allocation
- Developing a framework for managing a crisis

**Crown Agents
Bank**

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SESSION DESCRIPTIONS

Treasurers and Insurance Roundtable Conference

Day 1 | June 26, 2023

Global Banking: Navigating Solutions with Your Financial Providers

Relationship managers from two prominent global banks offer their perspectives on issues that challenge development and public sector organizations, ranging from payments and last-mile solutions, to sanctions and compliance, and on optimizing bank relationships.

Banking in a Frontier Market

Mr. Carasso provides a fascinating perspective on the challenges faced in maintaining viable banking solutions in a most difficult frontier market in the turbulent wake of geopolitical events.

Keynote: Facilitating Financial Access in an Interconnected World

Under Secretary Nelson shares his thoughts on:

- The 2021 U.S. Sanctions Review;
- The adoption and domestic implementation of UN Security Council Resolution 2664;
- Protecting Disaster Relief in Syria;
- The U.S. Department of the Treasury's De-Risking Strategy;
- And future policy objectives.

New OFAC Baseline General Licenses: Progress on Bank De-Risking

An enlightening conversation among key stakeholders who either drive or are impacted by the enhanced anti-terrorism control of fund flows that have implications for financial access. How can there be a reconciliation within the nonprofit, financial, and governmental sectors to promote financial access for nonprofit organizations and ensure continued cooperation in reconciling this critical issue?

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Innovation in the Ecosystem of Payments

This moderated session provides a fascinating conversation on the innovations and challenges beginning with the treasury management solutions utilized by the payment initiator through financial institutions and The Clearing House. It will highlight new ideas and cutting-edge technologies that The Clearing House, member banks, and technology companies are building to bring new solutions to the market to provide faster, safer and smarter digital transaction services and includes dialogue around the implications of data management.

Fundamentals of Investment Management

What does “Focusing on Investment Fundamentals” mean to the treasury of a large development organization? Hear from a senior portfolio manager in the asset management department of the World Bank Treasury as he shares an institutional perspective on the importance of having a clear investment approach, philosophy, and process.

Treasurers and Insurance Roundtable Conference

Day 2 | June 27, 2023

Africa in Context: What to Make of 2023 (Already)!

Understanding and adapting to emerging trends and challenges across the African continent is crucial for businesses and financial institutions. In this panel discussion, we bring together industry experts who will provide valuable insights into the geopolitical, economic, and banking-specific challenges facing Africa today. Panelists will have the opportunity to explore the top conflicts identified by the Council on Foreign Relations, assessing their wider regional implications. The session will also feature an examination of the Economist Intelligence Unit's forecast for African economic growth, highlighting the areas that are bearing out and identifying potential sleeper risks. Esteemed representatives from Standard Bank and Eco-Bank will share their expertise on the opportunities and risks in the banking sector, discussing geographical and sectoral opportunities, risk mitigants for the bank and clients, and the challenges faced in adopting sustainable practices and technological advancements.

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Mind the Gap: Are You Connected?

Processes and controls are valuable to manage successful operations but when viewed from the outside can seem like unnecessary bureaucracy. How we understand and interpret the relevance of solutions and their time sensitivities will depend on perspectives, whether in the field or in a more centralized function. How do these different perspectives impact choices and solutions that we utilize? How do we work together to ensure the importance of the management of a solution isn't lost in translation? Issues include the implications for bank relationships and KYC versus the urgency of setting up solutions in the aftermath of a disaster etc. How can communication and relationships be leveraged to ensure both parties understand the comprehensive view and avoid gaps?

Geopolitical Risk in 2023 and Potential Financial Impacts to Aid Agencies

Serving the most vulnerable populations around the world is risky and can be very costly. Practitioners will learn about the types of financial exposure they face by operating in emerging markets, hear geopolitical updates from the eventful past year and be equipped with future considerations to contemplate with their leadership and donors.

Cultivating Your Greatest Assets: People

One of the most pressing issues leaders must address is how to attract, retain, and develop talent. Post COVID-19 issues have not only multiplied but have increased in complexity. Our speakers will dialogue on challenges and potential solutions and will engage the audience for participation on subjects such as managing remotely with engagement and inclusion, compensation structures with employees dispersed geographically, staff development, promotions and succession planning.

Lessons in Leadership

Being an effective leader includes important attributes, which are developed and adopted through intentional learning, engagement, and experience. Ms. Mizanga shares her leadership journey and the factors that have contributed to her success. She will highlight the importance of key attributes such as setting the vision, communication, problem solving, and relationship building and then focus on how to translate this into the future.

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Managing and Responding to Fraud in a Rapidly Changing Environment

Unravel the complexities of navigating fraud/waste/abuse with our insightful panel discussion. Learn from our panel of nonprofit and higher education industry experts as they discuss current fraud trends, risk exposure and valuable strategies to proactively identify, prevent, and address fraudulent activities. Discover how staying agile and adaptable can help your organization weather emerging threats and protect precious resources.

Reducing Risk by Cleaning House

This session highlights step-by-step actions that organizations need to take to become cyber-resilient. It merges professional guidance from insurance and legal experts into a comprehensive plan of action for securing corporate treasury against cyber-threats. Strategies presented in this session will be holistic and range from hi-tech to paper-based approaches. The speaker will discuss how treasuries should blend hi-tech and low-tech approaches to become effective in their cyber defenses, including tools such as tokenization, routine data hygiene exercises, and policy updated for 21st Century threats. Two key issues that will be explored are cyber extortion and electronic cyber-crime. Insights will be shared on best practices entities may undertake to position their cyber renewal, while maximizing coverage and minimizing premiums and the most common mistakes entities make in the cyber insurance process will be shared.

Treasurers and Insurance Roundtable Conference Day 3 | June 28, 2023

Navigating the Intersection of Insurance and Risk Management

Mission-driven organizations often take a unique approach to insurance and risk management programs. How do the programs overlap and where they should operate independently? We'll discuss the extent an insurance portfolio should have on the organization's practice of risk management, and how to initiate a risk management program at any stage of insurance maturation.

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Duty of Care: The Collaboration Between Insurance Carriers, Response Providers, and Crisis Management

Meeting an organization's duty of care requires careful coordination between an organization's internal crisis management teams and contracted third-party support. This session will explore the insurance policies and response providers integral to duty of care programs. We'll consider uninsured services and how they can responsibly factor into duty of care, as well as the benefits and drawbacks of both insured and uninsured solutions. Finally, we'll consider how to close the gap and minimize financial uncertainty of unaffiliated response providers by integrating them with insurance programs.

2023 and Beyond... Managing Through the Uncertainty of the Insurance Market

Take a glimpse into the future by examining rising geographic and geopolitical factors and consider underwriters' concerns that impact our coverage placement. After a period of rate increases, it's time to review premium considerations to better understand trends and premium cost factors. Finally, there will be an examination of insurance company challenges to make connections with our coverage placement and establish a renewal game plan.

Integrating Risk Management into an Organization: A Practical Approach

Organizations often focus on insurance coverage but lack an understanding of how risk management and mitigation integrate into a successful insurance solution. Learn from your fellow risk practitioners the practical applications at other mission-driven organizations and the discipline of risk and insurance management. Various phases of risk and insurance program maturation will be explored to understand the dynamics of a resilient risk management program, both for local and global operations. We'll consider the challenges of improving the program, and outline ways to maximize efforts to engage colleagues to serve as critical risk management allies.

Professional / Management Liability: Opportunities and Challenges to Maximize Coverage

Management liability can be a challenge to understand. Common exclusions of D&O policies will be explored to better grasp their impact and how our program should be structured to address those gaps, whether through endorsements, policies for unique risks, or non-insurance risk treatment plans. As mission-driven organizations, we'll dive into the nuances of professional liability and vicarious exposure in the face of confusing and sometimes contradictory demands

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from donors, and we'll consider the management liability needs for our country and field offices, exploring the connections and gaps with our overarching master insurance programs.

Contractual Risk Transfer: Getting it Right

Broker partner relationships are critical, and insurance and risk managers often rely on the guidance of those partners for contractual risk decision-making. Hear from brokers their best guidance in understanding common indemnification clauses and how they can vary from one jurisdiction to another. Understand the commonalities and conflicts between a donor or client's requirements and the terms on standard insurance policies. When it comes to flow-down requirements for our sub-awardees, grantees or contractors, what do the carriers need to know, and how does that impact coverage? How do decisions for coverage terms and clauses factor into our status as insured or just plain uninsured?

Treasury Educational Courses

Day 3 | June 28, 2023

Bank Management: How to Achieve Win-Win Bank Relationships

- Selecting a bank for your business through RFI/RFP processes
- Achieving a trusted and transparent banking relationship
- Navigating KYC
- Ascertaining where the bank can provide the best value and support to match the organization's needs

Foreign Exchange: Strategy for Success

- Identifying sources of foreign exchange risk
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- The need for a formal business continuity plan
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- Understanding how business continuity extends beyond processes; it includes people
- A systematic plan for continuing education of staff to stay knowledgeable about existing and new Treasury products & services

Counterparty Risk: Protecting your Organization

- Identifying an organization's exposure to counter party risk; cash/deposits, foreign exchange contracts, credit utilization, legal contracts
- A framework for managing counterparty risk for financial and non-financial institutions (i.e. money transfer agents, vendors, and hawalas)
- Creating counterparty risk allocation
- Developing a framework for managing a crisis

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SPEAKER BIOGRAPHIES

Leslie Archambeault
Managing Director, Humanitarian Policy
Save the Children US



Leslie Archambeault is a human rights attorney and international policy specialist with over 19 years of experience in the areas of humanitarian law and policy, international human rights law, including children's rights, and conflict prevention and peacebuilding. Leslie is currently Managing Director, Humanitarian Policy at Save the Children where she leads on policy analysis and advocacy on all of Save the Children's humanitarian policy and advocacy efforts with the U.S. government across crisis response and thematic workstreams. She was previously Senior Director (Acting) Global Development Policy, and Director of Gender Policy and Advocacy at Save the Children. In March 2021, Leslie was named one of the 100 most influential people on Gender Policy globally by *Apolitical*.

Previous to her work with Save the Children, Leslie served as Plan International's Global Humanitarian Policy and Advocacy lead (deployable), where she led on federation-wide the development, implementation, and coordination of crisis specific and thematic advocacy efforts the country and international policy level, including related to the UN Security Council's Children and Armed Conflict Agenda, forced displacement and the Global Compact on Refugees, gender and GBV in emergencies, and education in emergencies. She has worked for the conflict prevention and peacebuilding unit of the UNDP's Regional Hub for Arab States where she was responsible for crisis specific and regional/sub-regional conflict analyses and has also led research, policy analysis, and advocacy on issues under the Women, Peace and Security Agenda for UN Women's Peace and Security Team and Human Rights Watch's Women's Rights Division, including on gender-based violence in emergencies, forced marriage and sexual slavery in conflict contexts, and transitional justice.

Sebastian Ashong-Katai
Group Head, Financial Institutions and International Organizations
Ecobank Group



Sebastian has been the Group Head for the Financial Institutions and International Organizations (FIIO) client segment at the Ecobank Group since May 2010. In this role, Sebastian has managed the Ecobank Group's global correspondent network to support a diverse business that covers Corporate & Investment Banking, Consumer Banking and even microfinance across 36 countries in Africa. The second part of his current role involves managing the Group's relationship with key NGOs, multilateral organizations, development finance institutions, non-banking financial institutions, and philanthropic organizations operating globally and regionally in Africa.

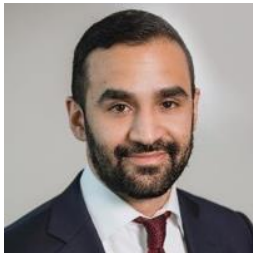
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Prior to joining Ecobank, he worked with the Standard Bank of South Africa, where he was a member of the Investment Banking Africa coverage team. He started his banking career as an International Graduate Recruit with the Standard Chartered Bank Group (SCB). At SCB, he spent five years during which time he worked in Singapore, London and across West Africa in a combination of Risk Management and Business Development roles. He subsequently moved to Citigroup, where he covered Ghana, Eastern Africa and Southern Africa over a 5-year period as a VP in the Non-Presence Countries and Financial Institutions business. During this period, he financed and provided transaction banking solutions to several financial institutions, sovereigns and non-profits across Africa. Sebastian holds a BA in Economics & Accounting from the University of Ghana, a MSc. in Shipping, Trade & Finance from the Sir Costas Grammenos International Centre for Shipping, Trade & Finance at the Cass Business School, City University, London.

Sebastian is an avid photographer and lover of nature. He is married with 2 children.

Sly Atayee **Senior Manager, Industry Specialty Services** **BDO**



Sly Atayee is a Senior Manager in BDO's Industry Specialty Services practice, focused on assisting clients with various aspects of forensic analysis and federal compliance. Examples of his in-depth work experiences includes forensic analysis, fraud investigations, complex cost recovery calculations, defective pricing analysis, grants management, general project management for grantees, internal control assessments, financial process redesign, policy and procedure development and support, and assisting with other various tasks that feed into a federal awardees compliance and cost recoverability.

Sly's experience covers a broad range of Government rules and regulations, including Uniform Administrative Requirements for Federal Awards (2 CFR 200). In addition, Sly also has in-depth experience working within the COSO Internal Control Framework.

Sly has led numerous forensic analyses for several international non-governmental organizations ("INGO's") and government contractors, including field work domestically in the US, and in Africa and the Middle East. His experience includes litigation support, substantiating costs through the collection of supporting documentation, performing data analytics in order to calculate and quantify losses and economic damages, whether suffered through tort, breach of contract, fraud, or misconduct, as well as market analysis for procurement. Many of Sly's engagements have been privileged and were conducted through the client's legal counsel.

Sly has also assisted with defective pricing analyses relating to federal contracts which are subject to the Truth and Negotiations Act (TINA). This included examining a client's pricing strategy for its federal awards, determining the contractor had more current, complete and accurate cost and pricing data, quantifying a Rough Order of Magnitude of potential

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overcharging to the federal government, and then providing recommendations to prevent such practices from occurring again in the future.

Moojan Behziz
Deputy Treasurer
Bill & Melinda Gates Foundation



Moojan Behziz is responsible for Treasury at the Bill & Melinda Gates Foundation where she works primarily on global banking and insurance. She started her career at PWC, responsible for tax preparation of tax-exempt organizations. Following her work with PWC, Moojan spent 13 years at Amgen, Inc. and held positions of increasing responsibility mainly within global treasury, which included cash management, capital planning, interest rate and foreign exchange risk management, and corporate insurance. Prior to joining the Bill & Melinda Gates Foundation, Moojan was the Assistant Treasurer for Wesco Aircraft, responsible for M&A treasury integration, cash operations, and debt restructuring.

Peter Briggs
Senior Portfolio Manager, Strategy and Sustainability
World Bank



Peter Briggs is a senior portfolio manager on the Strategy and Sustainability team within the World Bank Treasury. He is responsible for designing model portfolio strategies and managing sector allocations for total return portfolios. He is also responsible for developing and implementing sustainable investment strategies, assessing investment frameworks and policies, and managing the World Bank's sustainable impact portfolio.

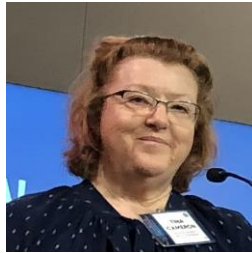
Prior to his current role, Peter specialized in managing the World Bank's Agency MBS portfolios and securitized products. He brings over 15 years of fixed-income portfolio management experience. Peter has also been responsible for managing US Treasury portfolios, SSA credit risk, FX and Repo transactions, and the World Bank's operational liquidity portfolio. Earlier in his career, he was responsible for managing the World Bank's Discount Notes Program.

Peter earned a BA degree in economics and political science from Bucknell University and an MBA degree with a specialization in finance from George Washington University. He also studied international finance and development at SOAS University of London.

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Tina Cameron
Manager, Global Insurance
World Vision International



Tina joined WVI in 2016 and has been a commercial insurance and risk management practitioner since 2006. She is experienced in a wide range of insurance products including: Aircraft/Drone Liability, Environmental Liability, Global Marine Hull P&I and Cargo, Product Recall, DBA, Captives, Business Travel Accident, Political Risk, Management Lines, Offshore and Professional Liability.

Prior experience includes her role as Corporate Risk Manager at Teledyne Technologies, an aerospace and defense, marine instrumentation and engineering conglomerate. In recent years, Tina has focused on specializations in Global Property, Fleet and Travel, and Owners/Contractors Risk Management in under-developed countries. She has presented at various industry conferences, served as a RIMS panelist “Ask a Risk Manager,” and is the author of Demystifying Foreign Voluntary Workers Compensation, a white paper published by RIMS.

Tina supports operations in 90+ countries, including strategic contractual risk transfer and loss prevention/mitigation techniques. Tina serves on advisory committees, conducts research and data analysis, oversees complex claims, writes internal papers, and leads special projects.

Tina holds a Bachelor of Science degree in Finance from Woodbury University, School of Business. She studied Global Economics at California State University LA, Graduate School of Business and Economics. She holds industry credentials, ARM, ARM-E and RIMS Fellow. She served on the RIMS International Council, and is a long-time member of FERMA.

Joseph Carasso
Chief Executive Officer
Afghanistan International Bank



Joseph Carasso Jr. started in banking in 1994 in Brazil, his home country. In 1997 he joined Citibank, where he worked for 23 years, in different countries and senior roles, including Head of Non-Presence Countries, Financial Institutions and Foreign Correspondent Banking for Africa, CEO for Tanzania, Head of Corporate and Investment Bank for Uganda and Country Rep for Angola and Ghana. Since January 2021 he has been CEO for Afghanistan International Bank.

Mr. Carasso is married with 3 kids, holds an MBA in Finance and an undergraduate degree in Business Administration.

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David Clark
Assurance Practice Leader, Industry Specialty Services
BDO



David is a Managing Director in BDO's Industry Specialty Services practice, where he focused on working with recipients of federal grants and contracts. He advises organizations on a wide range of issues including compliance matters, cost allowability and recovery issues, risk management, and internal control and operational assessments.

David offers over 17 years of experience focused on supporting nonprofits and higher education institution in improving compliance, governance, operations, and risk management activities. He has supported clients in a number of roles, including serving as co-sourced and outsourced internal audit, leading compliance and risk assessments, supporting and responding to government audits, conducting fraud investigations, and providing advisory services to enhance process efficiency and effectiveness. David's clients have included The Aspen Institute, The Brookings Institution, Cornell University, Feed the Children, Georgetown University, Harvard University, Massachusetts Institute of Technology, Princeton University, and Stanford University.

David's specific experience includes helping organizations:

- Develop and document organizational control environments and activities in line with the COSO Internal Control framework.
- Evaluate business operations, policies and procedures, and overarching control environments and implement changes that foster enhanced efficiency, effectiveness, and control.
- Respond to changing regulatory requirements and evaluate regulatory compliance.
- Assess enterprise risks (including fraud risks) and facilitate discussions with senior leaders regarding mitigation and monitoring of the organization's risk landscape.
- Investigate and resolve matters related to regulatory compliance (including false claims), employee misconduct, misappropriation of funds, fraudulent financial reporting, and whistleblower complaints.

Prior to joining BDO, David served as a Director in the Risk, Internal Audit, and Cybersecurity Consulting practice of an international accounting firm, focused on providing services to nonprofit organizations, federal funding recipients, and grant making organizations. He has also served as a senior audit manager at a leading financial institution. David presents at numerous conferences and trainings on topics such as regulatory compliance, internal controls, cost allowability, fraud prevention, risk assessments, working with internal audit, and organizational governance.

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James M. Colassano
Senior Vice President, RTP Product Development and Strategy
The Clearing House



Mr. Colassano is the product management executive for the RTP® Product at The Clearing House. He has over 30 years of experience in payments & cash management and joined TCH in 2016 to help launch their real-time payments program. He has accountability for TCH owner and direct bank relationships with the RTP program and works with these banks on opportunities and applications that cross all segments and use cases. He also has responsibility for product innovation, corporate engagement on RTP and other product expansion activities across TCH.

Before joining TCH, Jim spent 10 years with HSBC as a Product Executive in their Payments and Cash Management group. During that period, he served as the Global Product Head for HSBC's Payables business which had responsibility for all faster payments initiatives as well as cash, check and ACH payment products worldwide. Prior to HSBC, he spent 15 years with JPMorgan Chase in a variety of cash & treasury management roles. Mr. Colassano holds master's degrees in Banking and Finance from Pace University.

Charmaine Davis
Senior Vice President, SEZ Corporate Segment
Marsh



Charmaine Davis is a Sr. Account Executive within the Corporate Segment in Washington, DC servicing education and non-profit business. As a consultant, she is accountable for designing and delivering risk management solutions to protect the financial, physical and human assets for her clients.

Charmaine joined Marsh in December 2001 as an administrative broker. Her success has led to her promotions and expanded responsibilities, globally. Prior to Marsh, Charmaine worked as an account manager at a local insurance agency, focused on public entity, general contractors and entertainment. Charmaine Davis is a Sr. Account Executive within the Corporate Segment in Washington, DC servicing education and non-profit business. As a consultant, she is accountable for designing and delivering risk management solutions to protect the financial, physical and human assets for her clients.

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Ken Eye
Director, Industry Spec Services
BDO



Ken Eye services clients in the nonprofit business with areas of specialty in internal audit, contracts and grants management, compliance and financial management. Ken has provided consultations to management teams on a comprehensive range of operational areas including establishing internal audit units, advising on regulatory interpretations and compliance, streamlining existing financial and operational processes and ensuring adequate internal controls. Specific issues where Ken has assisted organizations are in matters related to governance, cost reasonableness, cost accounting, procurement, sub-recipient monitoring and management, budgeting, reviewing field financials for compliance and risk, grantee project audits and auditing grantee fraud.

Prior to consulting, Ken has held senior leadership positions in both international and domestic non-governmental institutions in charge of internal audit and compliance departments. He has more than 25 years in nonprofit experience. His extensive experience includes a wide range of USG funding agencies as well as a number of private donor organizations. Ken has trained staff on policy and procedures, ethics and other operations specialties with a focus on the nonprofit sector. Ken has managed external auditor single audits and supported organizations undergoing OIG audits. His experience is achieving superior performance by designing and implementing operational systems and recommending internal controls to reduce costs, increase efficiencies, accuracy and compliance.

Ken has worked in non-profit organizations in diverse sectors – relief services, health, education, organizational capacity building, agricultural and conservation. Ken’s vast industry knowledge ensures that solutions are grounded in practical, operational experience that support the strategic goals and missions of organizations.

Warren Fischi
Senior Vice President
McGriff Insurance



Warren is a 30-year commercial insurance broker for McGriff Insurance that specializes in cyber insurance. He utilizes his Master’s in Business Administration to assist businesses in identifying and managing risk.

He is sought after as a cyber-speaker and has presented to worldwide audiences. His education and experience allow him to communicate the complexities of the cyber policy into understandable language for his audience. His presentations provide insight for insurance buyers to maximize the benefits of their cyber insurance policy.

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Joe Gleason
Director, Global Risk Management
AHT Insurance



With over 25 years' experience managing operational risks globally, Joe Gleason brings a seasoned and practical approach to his role at AHT. Working with clients to identify and assess risks and then build and refine mitigation strategies, Joe's role is a key resource supporting clients in AHT's International Aid and Development Organization practice. Whether it's through reviewing and strengthening plans and procedures, delivering training on topics such as travel risk or critical incident response or advising clients on current best practices within the community, Joe helps enable client operations in some of the world's most challenging environments.

Prior to AHT, Joe spent 17 years directly managing global security and operations for an NGO with offices in over 60 countries, providing a practical, experienced foundation for his role advising clients. In a further commitment to the community, Joe serves on the board of the International NGO Safety and Security Association (INSSA). He has worked closely with Humentum, the Overseas Security Advisory Council, Disaster Ready and other industry partners to strengthen risk management and crisis response practices within the NGO community.

Karen Hom
Managing Director, Transaction Banking Standard Chartered, Americas
Standard Chartered Bank



Karen Hom is a Managing Director at Standard Chartered Bank, Americas. She oversees the Transaction Banking Cash Management team that serves large multinational corporate clients in the Industrial and Natural Resources sectors, as well as the Non-Bank Financial Institutions sector for US-based clients globally. Karen's expertise lies in crafting customized global cash management and liquidity structures that cater to the specific needs of each client. She is a dedicated Diversity, Equity, and Inclusion champion and an active member of Standard Chartered Americas Diversity and Inclusion Council.

Karen joined Standard Chartered in 2009 as the relationship manager for Northeast financial institutions focused on global clearing, foreign exchange, and trade solutions for US and Canadian financial institutions. She transferred to the corporate banking team working as a global transaction banker covering trade and cash services for US multinational companies, supporting their global business needs.

Karen has over 25 years of banking experience and has worked in Asia and Latin America, building strong client relationships spanning institutional and corporate banking.

Prior to joining Standard Chartered, Karen spent 13 years with American Express Bank, more recently as the relationship manager for Northeast financial institutions focused on global clearing, foreign exchange, and trade solutions for US and Canadian financial institutions. Earlier

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roles included the APAC Corporate Banking Regional Business Manager covering 11 markets across the region, based in Singapore. She also spent five years in various risk management roles in Latin America covering local and US/European corporations and financial institutions, as well as in global credit risk management covering all business lines for risk exposure in Latin America, Europe, and Asia.

Karen has a Master of Business Administration from Thunderbird School of Global Management and a Bachelor of Business Administration from Loyola Marymount University.

Patrick Hu

**Senior Policy Advisor, Office of Terrorist Financing and Financial Crimes (TFFC)
U.S. Department of Treasury**



Patrick Hu is a Senior Policy Advisor at the Office of Terrorist Financing and Financial Crimes (TFFC) at the U.S. Department of the Treasury (Treasury) where he covers matters related to the Financial Action Task Force, the intersection between AML/CFT/sanctions policies and the NPO sector, and transnational organized crime, among other issues. Prior to joining TFFC, Patrick was a Sanctions Compliance Officer at Treasury's Office of Foreign Assets Control (OFAC) where he investigated financial institutions for apparent violations of U.S. sanctions, provided guidance and conducted outreach to a wide-range of industries including NPOs, and coordinated sanctions compliance policy implementation for the Iran, Russia, Syria, and human rights sanctions programs.

Before joining Treasury, he was a legislative staffer in the United States Senate focused on national security and foreign policy.

Tom Hunt

**Director of Treasury and Payment Services
Association for Financial Professionals**



Tom Hunt, CTP, is the Director of Treasury Services and Payments at the Association for Financial Professionals. He leads treasury and payment content for AFP.

Hunt has more than 15 years of direct treasury experience working across different industries, including various roles at Medtronic, Fairview Health Systems, and, most recently, at 3M Company. At 3M, he oversaw the global banking strategy, redesigned and implemented a new domestic cash management structure, and led acquisition activities for the treasury department.

He holds an MBA in finance from the Opus College of Business at the University of St. Thomas in St. Paul, MN.

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Gayle Jacobs
Political Risk and Structured Credit Advisor
Marsh



Gayle is a Political Risk and Structured Credit Advisor. She supports multinational clients and non-profit organizations in crafting bespoke insurance contracts, which are often multi-year syndications involving multiple insurers.

Gayle Jacobs joined Marsh in 2019 following Marsh's acquisition of JLT. Gayle has been a broker of Political Risk Insurance since 2007. She works closely with insurers in the U.S. and London on syndicated political risk, contract frustration and structured credit insurance solutions.

Prior to working in the insurance industry, Gayle founded her own political risk consulting practice and served as an Intelligence Officer for the Defense Intelligence Agency (US Department of Defense) in Washington D.C. Her background also includes working for the Foreign Commercial Service at the US Embassy in Paris.

She received her bachelor's degree from University of Michigan and her MBA in International Management from the Thunderbird School of Global Management (Glendale, AZ and Geneva, Switzerland). Gayle resides in West Michigan with her husband and two children.

Cassandra Kaplan
Senior Advisor, Treasury
Save the Children US



Cassie Kaplan leads the Treasury team for Save the Children US (SCUS), a non-profit organization whose mission is to improve the lives of children through education, health care and protection from harm in areas plagued by war and violence. With over \$1bn in revenue in 2022, and in collaboration with Save the Children International (SCI), SCUS provides support in more than 100 countries. Cassie works primarily on cash operations, liquidity management and endowment investment portfolio management, as well as monitoring and managing Treasury risk and control processes. She is also passionate about cryptocurrency philanthropy and Web3 as part of SCUS's global Crypto & Web3 steering group.

She started her career with SCUS as a Finance intern over 11 years ago and continued with the Treasury team after earning her Bachelor of Sciences degree from the University of Tampa in 2011.

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Karen Kearney
Treasurer
Stanford University



Karen Kearney currently serves as Treasurer, Stanford University. She is responsible for the university's capital markets strategy, debt portfolio, working capital/liquidity management and merchant services, as well as business operations and compliance for the university's global subsidiaries. She has spent over 20 years at Stanford in various financial roles, with experience in financial reporting, systems, tax, audit and compliance, and global operations. She serves as a director/officer on a number of Stanford's subsidiary Boards, including in China, India, South Korea, South Africa, Chile.

In Spring 2021, Ms. Kearney led the issuance of the first ever dual-verified ESG bond in higher education, leveraging Stanford University's long-standing commitment to environmental and social sustainability. The bond was externally verified for both CBI's Climate Bond certification (climate-focused and aligned with objectives of the Paris Accord) and ICMA Sustainability certified (a combination of both green and social sustainability objectives).

Karen serves as an Executive Committee member of the Treasurer's Roundtable, representing the higher education in the global NGO community. In Fall 2021, she was appointed to the board of trustees of the Climate Bond Initiative (CBI), a UK charity. CBI works to support the mobilization of capital flows in the bond markets to provide investment in the projects and assets necessary for a rapid transition to a low carbon and climate-resilient economy.

Karen was previously CFO at the San Francisco Museum of Modern Art, and started her finance career at Price Waterhouse, London, after graduating from University of Cambridge in geography. She is passionate about sustainability, and thrilled that her professional and academic experience are threading together in support of addressing the climate crisis.

Mike Kelly, CIC, CRM
Senior Partner & Risk Advisor
AHT Insurance



For the past 12 years working at AHT Insurance, Mike Kelly's core focus has been on helping international development organizations improve their risk profile by identifying, managing, and insuring top operational risks. Mike places a specific focus on international travel risk management and helping to ensure organizations are meeting Duty of Care to International Staff and Travelers. As a Partner at AHT Insurance, Mike works with all types of International Development organizations including public health, policy, and disaster relief.

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Stella Kilonzo

Director, Treasury Innovation | World Vision International



Stella Kilonzo provides leadership for the Global Treasury Innovation, Leadership and Education. She identifies and helps conceptualize key treasury and insurance opportunities, challenges and possible solutions related to issues that WVI, iNGOs and higher education institutions are experiencing that may impact efficient operations. Stella leads the design and execution of the Treasurers and Insurance Roundtables <https://www.treasurersroundtable.org/>, a thought leadership, solution-oriented, and advocacy platform for treasury and insurance leaders in international development organizations, higher education institutions, and foundations.

Stella has a multi-faceted background having led a series of firsts as a strategic innovator and builder of new platforms, products, business lines, and teams. Stella began her career in the securities market regulation at Financial Industry Regulatory Authority (FINRA) in Chicago, Illinois. She then returned to Kenya and worked at Price Waterhouse Coopers (PwC) and the Capital Markets Authority Kenya. She was appointed by the President of Kenya as CEO of the Capital Markets Authority (CMA) Kenya. She also served as the Chairperson of the East Africa Securities Regulatory Authorities (EASRA) and as an ex-officio member of both the Kenyan Insurance Regulatory Authority and Retirement Benefits Authority. In 2013, she joined the African Development Bank (AfDB), led the authorship of its first ever Financial Sector Development Policy Strategy and then set up its client-facing capital markets division leading her team in the financing of over \$1B capital markets transactions. In 2018, she was promoted to Senior Director, where she headed up the creation and execution of the inaugural Africa Investment Forum.

A thought leader, Stella has spoken at industry conferences, authored papers on Africa's financial services industry, and received numerous industry accolades. She earned an MBA from Loyola University Chicago, received executive education at the IE Business School in Madrid, and graduated with a first-class honors in Bachelor of Commerce (Accounting) from the Catholic University of Eastern Africa, Kenya.

Yukari Komuro

Director of Compliance and Investigations | FHI 360



Director of Compliance and Investigations in the Office of Compliance and Internal Audit at Family Health International (FHI 360),

Yukari Komuro (CIA and CFE) is a passionate professional in the field of audit, fraud examination, and compliance and is a volunteer officer with the Institute of Internal Auditors since 2019.

Yukari is the Director of Compliance and Investigations in the Office of Compliance and Internal Audit at Family Health International (FHI 360), an international nonprofit working to improve the health and well-being of people in the United States and

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around the world. Yukari provides strategic leadership in the organization's internal investigation and fraud prevention function. Yukari holds an MBA/Finance degree from Johns Hopkins University and bachelor's degrees in international studies and economics from the American University and Ritsumeikan University (Japan).

Ruth Kochenderfer Managing Director | Marsh



Ruth Kochenderfer is a broker in Washington, DC and co-leader of Marsh's National Health Care Financial and Professional Lines (FINPRO) practice. As a broker, she advises clients on the evaluation and design of risk transfer solutions that address financial and professional exposures, including directors and officers liability, employment practices liability, managed care errors and omissions, regulatory billing liability, crime, special crime, employed lawyers liability, wage and hour liability, and fiduciary liability. Since joining Marsh, Ruth has worked with many health care entities, including health systems, hospitals, managed care organizations, behavioral health providers, senior care providers, physician practices, and health technology companies.

Prior to joining Marsh in 2014, Ruth practiced law for more than 17 years as an insurance coverage litigator. Immediately before joining Marsh, Ruth was a partner at Steptoe & Johnson LLP in DC. She represented insurers in complex insurance coverage litigation throughout the United States involving environmental (landfills, chemical plants, utilities), toxic tort/product liability (asbestos, creosote, welding rod fumes), construction (sports stadiums, mixed-use developments, condominiums), regulatory (off-label use of pharmaceuticals), and property damage and business interruption matters (hurricane and terrorism losses). Ruth also served as a judicial clerk for Judge Tom Price of the Texas Court of Criminal Appeals.

Michael Liebowitz Senior Director of Insurance and Risk Management | New York University



Michael Liebowitz is currently the Senior Director of Insurance and Risk Management for New York University, responsible for its placement insurance programs as well as implementing other risk management activities. At NYU he coordinates a Global Insurance Program for the academic side of NYU as well as the NYU Langone Health System side. Some of those activities include contract review, construction site safety as well as employee occupation safety. Previously, he was Director of Risk Management, Safety and Security for Bridgeport Hospital & Healthcare System Inc. in Bridgeport, Connecticut for 17 years. During his tenure at the company, which is the largest employer in Bridgeport, he single-handedly created the risk management department that supported the activities of five companies. Prior to joining, Bridgeport Hospital & Healthcare System Inc., Mr. Liebowitz was an

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insurance specialist for New York University Medical Center. Mr. Liebowitz graduated from the New York Institute of Technology. Mr. Liebowitz served as RIMS President from 2006 to 2007.

Mizinga Melu

Managing Director | Absa Bank Zambia PLC



With over 20 years' experience in the Banking Industry, Mizinga Melu is an industry expert who has been at the helm of top banking organisations having worked in six (6) African countries. She is also an award winning published author.

She is currently the Managing Director for Absa Bank Zambia PLC. She had previously held the same substantive role in Standard Chartered Bank.

She currently serves as a Non-Executive Director on the Zambia National Pension Scheme Authority (NAPSA) board and the current Bankers Association of Zambia (BAZ) Chairperson.

Mizinga is a multi-award-winning business leader and is a recipient of the following business awards:

- 2022 Recognized as Most Influential African Women Banker of the Year (Rest of Africa) at the Africa Bank Summit 4.0 Awards
- Named in 2021 Top 100 Women CEOs in Africa by Rest Global People
- Frontier 100 CEO
- Author of a #1 international Bestseller book 'Braving the Odds'
- 2020 Southern African Women in Leadership Trailblazers Awards winner
- 2020 Banking CEO of the year Zambia by Global Banking and Finance Magazine.
- 2019 Banking CEO of Year Zambia by International Business Magazine
- 2017 Transformational Leadership Award
- The All Africa Business Woman of the Year Award 2013
- Nominated for the 2013 Southern Africa Business Woman of the year by Forbes Magazine and CNBC
- 2013 Leaders and Achievers Outstanding CEO performance by PMR - South Africa
- CEO of the year across all industries by the Zambia Institute Chartered Accountants in 2013 Business Woman for the year 2013 by Africa Business Leaders Awards (AABLA)

Mizinga holds a Master's in Business Administration (MBA) from Henley Management College in the UK, an Associateship of the Chartered Institute of Bankers (A.C.I.B) UK and she is a fellow of the Zambia Institute of Bankers.

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Godfrey Mwanza

Senior Economic, Africa regions FIC Research | Standard Bank Group



Over 16 years, Godfrey has provided research, guidance, and investment expertise to pan-African and global institutions across various asset classes, including fixed income, credit, currencies, and equities within the African capital markets. He is currently serving as a Senior Economist at Standard Bank of South Africa in Johannesburg having previously had the role of Head of the African Investment Franchise at Absa Asset Management. Prior to that, he managed the Africa (ex-South Africa) Equities Fund at African Alliance. Before joining African Alliance, Godfrey honed his analytical skills at Enko Capital, a multi-strategy

Africa-focused hedge fund based in Johannesburg.

His career began in Zambia's corporate finance sector, where he made a significant impact by spearheading pioneering corporate transactions in the country. A CFA Charter holder, Mr. Mwanza holds a BSc in Economics from the London School of Economics and Political Science.

Brian E. Nelson

Under Secretary for Terrorism and Financial Intelligence | U.S. Department of Treasury



Brian Nelson is the U.S. Department of the Treasury's Under Secretary for Terrorism and Financial Intelligence.

Prior to joining Treasury, Brian was the Chief Legal Officer at LA28, the organizing committee for the 2028 Olympic and Paralympic Games in Los Angeles. In this capacity, he was responsible for directing the efforts with local, state, and federal partners to make the 2028 Games secure, as well as lead LA28's public-diplomacy work with various stakeholders.

His previous government service includes roles as a senior policy advisor, policy chief, and general counsel in the California Department of Justice. There, he oversaw key national security initiatives, including efforts to combat transnational criminal organizations, dismantle human trafficking networks, and build state and international partnerships to stop money laundering and high-tech crimes. Brian also led a number of efforts to enforce and then reform financial regulations in the aftermath of the national foreclosure crisis in the late 2000s.

Earlier in Brian's career, he was a special counsel and then deputy chief of staff of the National Security Division of the U.S. Department of Justice. In those roles, Brian managed the flow of national security information critical to the Assistant Attorney General's capacity to use intelligence and criminal authorities to disrupt terrorist threats in real time. One of Brian's core responsibilities was also to oversee the economic national security work of the Division's Foreign Investment Review Staff, which participates in the Treasury-led Committee on Foreign Investment in the United States.

Following clerkships at the United States Court of Appeals for the Ninth Circuit and the United States District Court for the Eastern District of Pennsylvania, Brian began his

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career at Sidley Austin's DC office as an attorney in information privacy, national security, and appellate practices. He received his bachelor's degrees from UCLA and his J.D. from Yale Law School.

Lisa Oliveri

Director of Global Risk Management, Security, and Operations | National Democratic Institute (NDI)



Lisa Oliveri serves as the Director of Global Risk Management, Security, and Operations at the National Democratic Institute (NDI), a non-profit, non-partisan, non-governmental organization that works in partnership around the world to strengthen and safeguard democratic institutions, processes, norms, and values to secure a better quality of life for all. Lisa has extensive experience managing global safety and security functions for international non-government organizations, faith-based organizations, and academic institutions. She is one of the 34 members of the U.S. State Department's OSAC Council and serves on the ASIS International Global Board of Directors.

Nyagaka Onger

Executive Director, Corporate Strategic Advisory | Blaylock Van LLC



Mr. Onger heads the Strategic Advisory Services Division at Blaylock Van, LLC and has over 30 years of experience in the Capital Markets business. He was previously Head of Global Corporates in the Americas for Barclays PLC. From 2009 to 2011, Mr. Onger was Head of Global Finance and Risk Solutions for Barclays Africa in Johannesburg, South Africa. He managed the bank's financing products across 13 African countries. Preceding this, he was head of the Financial Institutions Debt Capital Markets Group at Barclays New York for several years. He joined Barclays in 2001 from JP Morgan, South Africa.

Mr. Onger is a graduate of Howard University where he received a Bachelor of Business Administration (Honors). He is also a graduate of Harvard Business School and has successfully completed the CFA examinations.

Sassan Parandeh

Global Treasurer | ChildFund International



Sassan Parandeh is the Global Treasurer of ChildFund International, responsible for treasury operations, risk management, cyber-incident response and insurance. Sassan has 32 years of direct corporate treasury experience from ChildFund, Dole Foods, Platinum Equity and Northrop Grumman. He and his team won the 2023 Gold Alexander Hamilton Award for best treasury transformation and prior to that, the AFP's 2014 Grand Pinnacle Award for innovation in payment systems.

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He is a co-founder of both the Treasurer's and the Insurance Roundtables and has served on both executive committees since their inception. Sassan has been published extensively in the AFP Exchange and Treasury Perspectives Magazines, as well as in peer-reviewed journals such as the Journal of Corporate Treasury Management, Journal of Payments Strategy & Systems, and the Journal of Business Continuity. In October 2022, Sassan was elected by the treasury and FP&A practitioner community to the Board of Directors of the Association for Financial Professionals (AFP). Sassan is a CTP, MBA, MPA.

Duarte Pedreira

Head of International Development Client Coverage | Crown Agents Bank



Duarte Pedreira is an experienced banker who has worked in multiple senior roles within relationship management, transactional banking, credit & political risk insurance and advisory. Currently Head of International Development Client Coverage at Crown Agents Bank, Duarte previously worked in senior roles for the Standard Bank Group (both in Angola and South Africa), Caspian Sea Capital and AIG.

Aside from his work at Crown Agents Bank, Duarte is currently also a Board Member of the ITFA, the Global Trade Finance Industry Body, where he heads up the Emerging Leaders, Institutional Relations and Africa streams. Duarte is also a keen philanthropist and education enthusiast, focusing on all levels from building schools catering for grassroots education at an early year's level in Africa, to lecturing to post graduate students at Bayes Business School in London.

Steve Perry

Global Treasurer | Catholic Relief Services



Steve Perry has directed global treasury operations for Catholic Relief Services at HQ and in over 100 developing programming countries for 29 years. He is responsible for establishing agency-wide best practices, treasury strategies, policies and procedures. He supervises a treasury staff of three, which is responsible for liquidity and banking with 300 international accounts with 30+ global bank relationships. He oversees insurance and foreign currency risks and conversions in 40+ major and exotic currencies. He enforces security and compliance with federal and international regulations on terrorist vetting and

OFAC. Steve is a Certified Treasury Professional, Certified Public Accountant and holds an MS in Taxation.

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Robert Peri

Global Head of U.S. Sanctions Compliance | Citigroup



Robert Peri is Citigroup's Global Head of U.S. Sanctions Compliance, leading the bank's implementation of U.S. and UN sanctions programs across the globe. Among his responsibilities, Robert manages Citi's Sanctions Intelligence Unit, the Sanctions Implementation and Investigations team, and the Global Level 3 transaction review units. Robert also serves as Citi's primary interlocutor to the U.S. Department of the Treasury's Office of Foreign Assets Control (OFAC).

Robert joined Citi from the U.S. Department of the Treasury where he held a variety of positions, including Director of Global Affairs in the Office of Terrorist Financing and Financial Crimes. During his time at Treasury, Robert served as the head of the U.S. delegations to the Asia Pacific Group on Money Laundering (APG), the Eurasian Group on Money Laundering (EAG), and the Likeminded Group on North Korea Sanctions. He also served as an expert assessor for the Financial Action Task Force (FATF) 2015 Mutual Evaluation of Malaysia. Robert holds a Master of Science in Foreign Service from Georgetown University.

Jennifer Poidatz

Vice President, Humanitarian Response | Catholic Relief Services



Jennifer Poidatz is Catholic Relief Services' Vice President for Humanitarian Response. Leading a global team of over 70 emergency technical advisors and response managers, she ensures timely support to CRS country programs and local partners responding to relief and recovery needs of disaster affected populations. Capacity building for CRS staff and local partners in emergency preparedness and response is also a priority, as well as informing and influencing wider humanitarian policy and reform.

She joined CRS in 1993 as an intern in Ghana. In 1994, Ms. Poidatz served as a Program Manager in Rwanda during the Genocide. Following a year in Haiti where she managed emergency assistance programming during a period of economic and political crisis, Jennifer spent two years in Burundi as the Assistant Country Representative and then as Country Representative.

In 1998, Ms. Poidatz became CRS Country Representative in Angola during the country's civil war. In 2005, she served as the Country Representative in Sri Lanka, where she was responsible for the oversight of the Tsunami response. From 2006 to 2009, she was the CRS Country Representative for India and from 2009 to 2011, Ms. Poidatz served as the Country Representative in the Democratic Republic of the Congo. Immediately before her appointment as Director and, subsequently, Vice President of Humanitarian Response, Jennifer led the development of CRS response to the war in Syria – including the initiation and expansion of programming in Turkey, Lebanon, Jordan, Iraq and Syria.

Ms. Poidatz holds a Bachelor of Science degree in Nutrition from the University of Vermont and a Master of Science Degree in International Nutrition from Tufts University.

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Kathryn Powers
Head of Treasury | World Vision International



Kathryn Powers is the Global Treasurer of World Vision International (WVI), a Christian relief, development, and advocacy organization with revenues of \$3.2 billion and operations in nearly 100 countries. Kathryn joined WVI in 2006 and has led the organization through the process of globalizing treasury and insurance including the development of services, policies and standards as well as implementing and leveraging technology. Before joining WVI, Kathryn held numerous treasury positions at AT&T, Lucent Technologies, and EDS. Kathryn holds an MBA from the University of Chicago. Prior to graduate school, Kathryn served in the financial and administrative management of rural “bush” health clinics and medical facility in Blantyre, Malawi.

Brenda Reynolds
Cash Manager, Global Treasury | Catholic Relief Services



Brenda Reynolds has over 16 years’ experience in cash management and FX trades. She currently is Cash Manager Global Treasury at Catholic Relief Services where she oversees the organization’s cash flow, manages financial transactions, and performs cash planning to meet unforeseen expenses and to avoid insolvency. Brenda oversees team of two treasury analysts, and she collaborates with a global team of finance managers. Brenda previously worked at Morgan Stanley working with trade support, back-office operations, FX confirmations, liquidity monitoring, and FED wire transactions. She serves on the board of Ten Thousand Villages, Baltimore, MD.

Amit Sahani
Global Head of Data | StoneX



Strategic and high impact Data Officer with decades of service across Data and Technology development and operations, involving business transformation and early adoption of Cloud solutions including establishing DaaS globally. Highly regarded expertise in planning, resourcing, and integrating strategic and operational data management initiatives in Fin-tech space integrating Front office, back office, risk and compliance system through Data to support enterprise goals of start-up to large, diverse, high performing global organizations. Experience in the design, planning, implementation, and oversight of technology platforms, systems, and solutions. Career defined by delivering Data Technology solutions and policies aligning with enterprise initiatives and objectives, while adhering to industry best practices. Expertise in Cloud-based development environments and possess outstanding leadership and team building strengths to direct priorities and determine appropriate skills needed to address emerging opportunities. Experience leading complex

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information technology programs, address emerging opportunities, and how organization should be organized.

Laura Schauble Vice President, Risk & Security | ACDI/VOCA



As the Vice President of Risk and Security, Laura manages risks related to ACDI/VOCA's staff and assets, including security risk management, travel risk, and crisis management programs, as well as our property and casualty insurance portfolio.

Before joining ACDI/VOCA in 2014, Laura was a special risks manager at Clement Worldwide, a global insurance broker, where she coordinated detailed risk analyses for clients in the international development industry and offered insurance solutions for foreign property, casualty, and health and life exposure, such as political and war risks.

Laura has served distinguishably as a Steering Committee member of Overseas Security Advisory Council (OSAC)'s International Development Sector Committee (IDSC) playing a transformative role in how its 223 members serve their communities. This exceptional performance culminated in the Committee receiving the OSAC Common Interest Committee Achievement Award 2021.

Laura holds a BA in Spanish from Lenoir-Rhyne College and an MA in International Affairs from American University. She is a Certified Risk Manager.

Rusty Smith Senior Vice President | McGriff Insurance



As a Property & Casualty Broker for McGriff, Rusty leads a team of insurance professionals aimed at helping businesses select the right insurance program to efficiently protect assets and mitigate risks. He works to help clients contain costs that drive insurance premiums by overseeing clients' initiatives related to claims management, experience modification reduction, and the integration of loss-prevention efforts. The team utilizes an Insurance and Risk Management Audit to uncover untransferred risks and present the solutions in a cost/benefit analysis.

Rusty began his insurance career in 1995 and began working for McGriff Insurance in 1999. Over the years, Rusty has gained extensive knowledge and experience with various insurance contracts including property, liability, automobile, workers compensation, inland marine, and international coverages. He works with domestic and international nonprofit organizations.

What sets Rusty apart as an insurance broker is his attention to detail, thorough knowledge of the fine points of insurance policies, and how they are best applied across a variety of

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businesses. He takes the time to understand client's needs and is skilled at explaining complex insurance concepts to business owners and their finance team.

Rusty earned a Bachelor's degree in Literature from the Virginia Military Institute. He holds a Property & Casualty broker and consultant license. He earned the Accredited Advisor in Insurance (AAI) designation from the Insurance Institute of American and the Certified Insurance Counselor (CIC) designation from The National Alliance for Insurance Education and Research.

Bob Stark

Global Head of Market Strategy | Kyriba



Bob Stark, Global Head of Market Strategy, Kyriba – Bob Stark has been a product and go-to-market financial technology leader for 25 years. As the head of market strategy at Kyriba, Bob works directly with clients, partners, and industry influencers to ensure Kyriba is at the forefront of financial technology. Stark has empowered finance leaders at some of the world's largest companies, and is a frequent speaker and author on treasury, risk management, and payments at AFP, EuroFinance, ACT, Sibos, and other industry events. Bob resides in Vancouver, Canada and is a graduate of Simon Fraser University.

Tobias Thiessen

Treasurer & Chair | The Global Fund



Tobias is an experienced finance professional and held various financial and treasury management positions in the private sector (specialty chemicals, fast moving consumer goods and oil industry) in Africa, South America and Europe and more recently in the development sector. Currently working for The Global Fund, an international organization active in global health, with approximately 4 billion USD disbursements per year to about 100 countries. Tobias is a board member of the Association of Corporate Treasurers in Suisse Romande, certified Financial Risk Manager (FRM) and holder of an MBA from HEC Paris.

Julien Tunney

Policy Advisor, Office of Foreign Assets Control | U.S. Department of Treasury

Julien Tunney is a policy advisor at the U.S. Department of the Treasury focused on the provision of humanitarian assistance. In this role, he engages with various stakeholders on humanitarian-related authorizations, including on the domestic implementation of UNSCR 2664. Prior to joining the Treasury, Julien was an associate at an international law firm.

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Chris Tynan

Vice President, Development Organizations - Banking, Capital Markets and Advisory
Citi



Chris Tynan is Vice President in Citi's Public Sector Development Organization Group. He manages the Corporate & Investment bank's NGO client segment – a select portfolio of international funds, foundations, charities, and multilateral organizations, as well as government contractors focused on development work. Additionally, he is responsible for providing banking coverage to U.S.-based Development Finance Institutions. Chris joined Citi in London in 2010. Prior to joining the Development Organizations team, Chris covered Ministry of Foreign Affairs and Embassy Banking clients, gaining key insights into managing banking relationships across disparate legal, regulatory, and geographic environments. Chris holds an M.A. from the University of St Andrews in International Relations.

Anthony Walker

Senior Director of Global Security | University Research Co. (URC)



At URC, Anthony leads the development of safety and security systems and implementation, delivery, and day to day ownership of the URC global security programs; drive the corporate security polices and standards across the enterprise; partner with Chief Operating Officer, Vice Presidents and other key customers to monitor and analyze operational environments and provide guidance, security oversight and support to the business development strategy and cost proposal preparation to ensure the requisite intelligence gathering sources are established.

He has also become a leading authority on international law-enforcement education services to various policing services and served as a diplomatic representative for major international events. Anthony is a current board member of both the George Washington Transformative Leadership Advisory Council and the Africa Region Overseas Security Advisory Council.

Areas of Expertise:

- Leadership Development/ Coaching
- Physical, Information & Asset Security
- Budget & Program Administration Security
- Strategy & Implementation Intelligence
- Information Analysis Team Building
- Leadership Risk Analysis
- Mitigation Complex International Investigations
- Crisis Management & Disaster Response
- High-Profile Stakeholder Relations
- Operations Planning & Execution

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Rich Yamashita

Treasurer | University of California, Los Angeles



Rich Yamashita is the Treasurer of UCLA. He is responsible for liquidity management, planning and analysis, investment allocation of surplus funds, internal bank/financing strategy, global banking operations and payments strategy on behalf of the multiple academic, auxiliary and health system institutions across the university. Rich is also responsible for strategic advisory services and analytics related to capital structure, financial risk management, strategic initiatives and global operations support for UCLA in collaboration with the UC system.

Prior to joining UCLA in 2014, Rich served over 20 years in various senior global Treasury leadership roles at large publicly traded multinational companies including Amgen, Herbalife International and Dole Food Company where he was responsible for capital market activities, foreign currency, commodity and interest rate risk management, global insurance and cash operations.

Rich received his BA in Economics from UCLA and later earned his MBA in Corporate Finance from the University of Southern California's Marshall School of Business. He is a Certified Treasury Professional. In addition to his UCLA responsibilities, Rich currently serves on the Board of Directors and as Vice Chairman of the Asset – Liability Committee at the University Credit Union and volunteers as a local youth leader for Scouts BSA.

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Claire Young

Global Relationship Director

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Absa Group is listed on the Johannesburg Stock Exchange and is one of Africa's largest diversified financial services groups. Absa Group offers an integrated set of products and services across personal and business banking, corporate and investment banking, wealth and investment management and insurance. Absa operates in 14 countries. The Group owns majority stakes in banks in Botswana, Ghana, Kenya, Mauritius, Mozambique, Seychelles, South Africa, Tanzania (Absa Bank Tanzania and National Bank of Commerce), Uganda and Zambia and has insurance operations in Botswana, Kenya, Mozambique, South Africa and Zambia. Absa also has representative offices in Namibia and Nigeria, and securities entities in the United Kingdom and the United States.



Citi

Chris Tynan

Vice President, Development Organizations - Banking, Capital Markets and Advisory

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Citi is an American multinational investment bank and financial services corporation headquartered in New York, NY. Citi is the third largest banking institution in the US; it has over 200 million customer accounts, over \$23.6 trillion assets under custody, and does business in more than 160 countries. The firm provides financial services to many of the world's leading NGOs, funds, foundations and development finance institutions as well as to sovereign governments and supranational organizations.

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**Crown Agents
Bank**

Crown Agents Bank Limited

Duarte Pedreira

Head of International Development Client Coverage

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Crown Agents Bank is a UK regulated provider of wholesale FX and cross-border payment services connected across frontier and emerging markets. Over almost two centuries, we have developed deep and trusted relationships with institutions around the globe. By bringing together digital capabilities with our unrivalled trusted heritage, we enable our clients to safely and securely move money where it is needed.

Ecobank
The Pan African Bank

Ecobank Transnational Incorporated

Ciara Joyce

Head of International Organisations & DFIs, US, UK & Europe

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Today, Ecobank is the foremost pan-African full-service banking group with banking operations in 33 African countries, and representative offices in Ethiopia and South Africa. We also have a banking license in France and representative offices in the United Kingdom, the UAE and China.

We have a broad client base serviced through our three business lines - Corporate and Investment Banking, Commercial Banking and Consumer Banking. We carry out sophisticated corporate finance deals, while also providing financial solutions to small and medium scale businesses across our markets. For the unbanked living in remote rural areas, Ecobank's digital banking solutions are a game changer, delivering affordable and convenient products, platforms and services. Our digital banking proposition brings sole traders and small businesses into the formal economy.

Our purpose from inception to date remains the same: to contribute to financial integration and to socio-economic development in Sub-Saharan Africa. Our continent's economic development and financial integration is therefore key and is our driving force.

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Kyriba Corporation

Mary Katherine (MK) Donnelly
Client Marketing Director
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mk.donnelly@kyriba.com

Kyriba is the global leader in cloud treasury and finance solutions, delivering mission-critical capabilities for cash and risk management, payments and working capital solutions. More than 2,000 clients worldwide rely on Kyriba to get 100% cash visibility, better manage FX losses, reduce fraud and make better, faster decisions through improved insight and intelligence.



Standard Bank Group

Maureen Harrington
Executive, Client Coverage International
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Standard Bank is the largest African bank by assets, operating in 20 African countries and 5 global financial centres. Headquartered in Johannesburg, South Africa, we are listed on the Johannesburg Stock Exchange, with share code SBK, and the Namibian Stock Exchange, share code SNB. Standard Bank has a 158-year history in South Africa and started building a franchise outside southern Africa in the early 1990s. Our strategic position, which enables us to connect Africa to other select emerging markets as well as pools of capital in developed markets, and our balanced portfolio of businesses, provide significant opportunities for growth. The group has over 50,000 employees, more than 1,100 branches and over 6,500 ATMs on the African continent, which enables it to deliver a complete range of services across personal and business banking, corporate and investment banking, and wealth management. Headline earnings for 2020 were R15.9 billion and total assets were R2.5 trillion (about USD170 billion). Standard Bank's market capitalisation as of 31 December 2020 was R209.4 billion (USD14 billion). The group's largest shareholder is the Industrial and Commercial Bank of China (ICBC), the world's largest bank, with a 20.1% shareholding. In addition, Standard Bank Group and ICBC share a strategic partnership that facilitates trade and deal flow between Africa, China and select emerging markets.

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standard
chartered

Standard Chartered Bank

Ayodeji Omoogun

Director, Public Sector and Development Organizations

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Standard Chartered Bank is a leading international banking group, with 85,000 employees, a presence in 60 markets and a network that serves customers in close to 150 markets. We offer banking services that help people and companies to succeed, creating wealth and growth across our markets. Our heritage and values are expressed in our brand promise – Here for good. Standard Chartered PLC is listed on the London and Hong Kong Stock Exchanges as well as the Bombay and National Stock Exchanges in India. We have a dedicated team, based in New York that supports Development Organizations and International NGOs in the United States by providing centralised relationship management and support teams across our markets.

StoneX[®]
Payments

StoneX Group Inc.

Katherine Zaveri

Vice President, Global Payments

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katherine.zaveri@stonex.com

StoneX Global Payments specializes in helping global development organizations, corporations and banks transfer funds across borders quickly, efficiently and transparently. Clients leverage its FIX-enabled FXecute platform and its global network of 350 correspondent banks to make payments in 140 currencies across over 180 countries – including an inbound/outbound capability in Brazil. Members of SWIFT and a SWIFT-accredited service bureau, Global Payments is backed by the global network and financial resources of ultimate parent company StoneX Group Inc. (NASDAQ: SNEX), a Fortune-500 company serving 30,000+ commercial and institutional clients and 125,000+ retail clients across five continents.

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AHT Insurance

Mike Kelly

Senior Vice President and Risk Advisor

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AHT Insurance is an insurance brokerage and consulting firm offering property and casualty, employee benefits, retirement, private client and international services for clients throughout the United States and 100+ other countries. Supporting numerous industries and boasting national recognition in international development, technology, manufacturing, government contracting and nonprofit practice areas, AHT offers clients highly customized solutions to identify and help mitigate risks they may face. As an employee owned firm, AHT's professionals have the stability and latitude to put clients' needs first and focus on what they do best – providing best-in-class service and solutions.

AHT has a dedicated practice for International Development Organizations. A core component of the practice revolves around international travel risk management and duty of care to help organizations prepare for risks related to people working in environments across the globe. As part of their specialization, AHT employs a former NGO Security & Operations director to help clients with non-insurance risk management such as identification and mitigation key operational risks.



BDO

Robby Vanrijkel

Director, Industry Specialty Services – Nonprofit & Education Practice

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BDO delivers assurance, tax and financial advisory services to clients throughout the country and around the globe. We offer numerous industry-specific practices, world-class resources, and an unparalleled commitment to meeting our clients' needs. BDO brings world-class resources and exceptional service to each and every one of our clients. BDO USA is a member firm of BDO International, the world's fifth largest accounting network.

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Blaylock Van, LLC

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Executive Director, Corporate Strategic Advisory Services

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Blaylock Van, LLC is the oldest and continuously operating African-American owned banking firm in the United States. Our firm offers top-tier investment banking solutions including debt, equity, and municipal underwriting, as well as sales and trading.

On the banking side, our range of clients vary from fortune 500, to mid and small cap companies, requiring a broad spectrum of financial needs. Our transactions include equity-based products, convertible and preferred debt, and senior/subordinated financing.

On the distribution side, we focus on a multi-tiered distribution strategy, targeting asset managers, pension funds, insurance companies, and second/third tier investors. Our effective origination and distribution platform, has led us to a prominent position, as a principal underwriter, for both frequent and infrequent borrowers.



Corpay

Usman Fazili

National Account Manager

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Corpay, formerly Cambridge Global Payments, is a leading provider of integrated cross-border payment services and FX risk management solutions. As a trusted partner for over 20 years, Cambridge delivers innovative solutions designed to mitigate foreign exchange exposure and address unique business needs. Our award-winning capabilities and industry-leading API payment technologies simplify the way businesses connect with the global marketplace. As one of the largest bank-independent providers globally, we are flexible and responsive, with offices across North America, Europe, and Australia.

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McGriff Insurance

Rusty Smith

Senior Vice President

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Founded in 1886, McGriff has provided highly customized insurance, risk management, and employee benefit solutions for organizations of all sizes for more than a century. We are a subsidiary of Truist Insurance Holdings, Inc., the seventh largest independent insurance broker in the U.S. and ninth largest in the world.

- Global Fortune 500 Member (#155 Fortune 500)
- Global resources, deep knowledge and market expertise
- Long-standing reputation for innovation and problem solving
- Alternative risk transfer solutions including captives, risk retention groups, risk purchasing groups, self-insurance trusts and pools
- Flexible business model for Risk Management Clients
- Unique market capacity – our leading position in the marketplace directly benefits our clients with access to capacity given to only McGriff clients

While McGriff placed \$11.6B of premium into the market last year, we also have the benefit of being able to leverage the market clout and strength of our parent, Truist Insurance Holdings and the \$30B of premium placed by the entire Truist Insurance Holdings family. Our ability to deliver these results is grounded in three critical elements:

- We understand your business
- Client centricity drives our structure & service model
- We are committed to your business



Marsh

Michael Rastigue

Senior Vice President, Property and Casualty Division

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Marsh is the world's leading insurance broker and risk advisor, serving commercial and individual clients with data-driven risk solutions and consulting services. The firm has over 40,000 colleagues globally in more than 130 countries, and is a business of Marsh McLennan (publicly traded on the NYSE: MMC), the leading global professional services firm in the areas of

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risk, strategy, and people. With 80,000 colleagues worldwide, Marsh McLennan helps clients navigate an increasingly dynamic and complex environment through Marsh, Guy Carpenter, Oliver Wyman, and Mercer.



Mercer
April Crowell Thurfield
Senior Principal
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april.thurfield@mercer.com

At Mercer, a wholly owned subsidiary of Marsh & McLennan Companies and sister company to Marsh, we believe in building brighter futures.

Together, we're redefining the world of work, reshaping retirement and investment outcomes, and unlocking real health and well-being. We do this by meeting the needs of today and tomorrow. By understanding the data and applying it with a human touch. And by turning ideas into action to spark positive change. For more than 75 years, we've been providing trusted advice and solutions to build healthier and more sustainable futures for our clients, colleagues and communities.

Welcome to a world where economics and empathy make a difference in people's lives. Welcome to brighter.



Paycode Limited
Ralph Pecker
Founder & Executive Sales Director
www.paycode.com
ralph.pecker@paycode.com

Paycode provides secure end-to-end payment technology that makes sending and receiving money easy. Its industry-leading payments solution, EDAPT, works for anyone, anywhere, using custom-designed technology for security, biometric identification, verification and authentication, fraud prevention, agent banking, offline real-time transacting, know-your-customer (KYC) data and digital money. Paycode's mission is to give biometric identity and affordable access to basic financial services to the unbanked and underserved in Africa and beyond.

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LIST OF PRACTITIONER ATTENDEES

Name	Organization
Abdul Razak Zakaria	ACDI/VOCA
Alexander Goodspeed	ACDI/VOCA
* Laura Schauble	ACDI/VOCA
Herinjanahary Fleur Henrissé	ADRA International
Yasmin Perez	ADRA international
Rob Ryan	American Red Cross
Sabine Sohigian	American Red Cross
Eugenia Solache	Americares
Sherry Walls	Arabella Advisors
Amy Chengwei Qu	Buddhist Tzu Chi Foundation
Hueiling Jennifer Chen	Buddhist Tzu Chi Foundation
Mei Feng Jennifer Cheng	Buddhist Tzu Chi Foundation
Mike Tang	Buddhist Tzu Chi Foundation
Yaochang Sam Yang	Buddhist Tzu Chi Foundation
Hamilton McNutt	Building Markets
* Brenda Reynolds	Catholic Relief Services
* Jennifer Poidatz	Catholic Relief Services
* Steve Perry	Catholic Relief Services
Ashleigh Subramanian-Montgomery	Charity & Security Network
Andrea Mooney	ChildFund International
Anna Price	ChildFund International
Bridget M. Taylor	ChildFund International
Erin Condon	ChildFund International
* Sassan Parandeh	ChildFund International
Sophie Lee	Columbia University
Vanina Carmona	Columbia University
Kelsey McCullough	Compassion International
Rachel Grunthaner	Compassion International
Stephen Zaubi	Cooperative for Assistance and Relief Everywhere Inc. (CARE)
Bob MacLeod	Cru
Steve Hackney	Cru
Fred Perez	DAI
Patrick Mancha Sossou	Education Development Center, Inc.
Tony Kittrell	Elizabeth Glaser Pediatric Aids Foundation
Valentina Justice	Equal Access International
* Yukari Komuro	FHI360
Eugene Korff	General Conference of Seventh-day Adventists
Mack Turner	Habitat for Humanity International, Inc.
Eric James Fullilove	Innovatons for Poverty Action
Andrea Hall	InterAction
Karen Wilkinson	International Justice Mission
Maggie Conerly	International Justice Mission
Stephanie Villatoro	International Justice Mission

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Ada Milos	International Medical Corps
Andrijana Politeo	International Medical Corps
Julie C. Carreon	International Rice Research Institute
Christen Orange	Johns Hopkins University
Laura McEvoy	JSI
Dianna O'Sullivan	Management Sciences for Health
LaVerne Wharton	Management Sciences for Health
Adolfo Chanez	Memorial Health Services
Binaya Dhakal	Mercy Corps
Kelly Wahl	Mercy Corps
* Lisa Oliveri	National Democratic Institute (NDI)
Luis M Garcia	Natural Resource Governance Institute
* Michael Liebowitz	New York University
Dhabie Brown	Norwegian Refugee Council USA
Rami Eid	Open Doors International
Erica Moret	Polisync, Centre for International Policy Engagement, Geneva
Marusya Lazo	Population Services International
* Cassandra Kaplan (Cassie)	Save the Children US
* Leslie Archambeault	Save the Children US
Steve Chiu	Save the Children US
* Karen Kearney	Stanford University
Olga Bergstrom	TechSoup
Mary Sanderson	The Asia Foundation
Craig Molyneaux	The Elizabeth Glaser Pediatric AIDS Foundation
Kathleen Stephan Riebeling	Tides
Mark Whitsitt	TrustBridge Global
Carlos Perrone	United Nations
Kamel Kessaci	United Nations
* Richard Yamashita	University of California, Los Angeles (UCLA)
Gretchen Kriebel	University of Virginia
Julie Witten Richardson	University of Virginia
* Anthony Walker	University Research Co (URC) Center for Human Services (CHS)
Kathryn Powers	World Vision International
* Ashwin Ramji	World Vision International
Ji Conn	World Vision International
Michael Lawson	World Vision International
Sam Carmichael	World Vision International
Stella Kilonzo	World Vision International
* Theophile Voilquin	World Vision International
Danielle Rowekamp (Dani)	World Vision US
Steve Carmichael	Young Life
Amina Demir	Zakat Foundation of America

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LIST OF PROVIDER ATTENDEES

Name	Organization
Brian Kalero	^ ABSA
# Claire Young	^ ABSA
James Gregory	^ ABSA
* Mizinga Melu	^ ABSA
* Joseph Carasso Jr	Afghanistan International Bank
* Joe Gleason	^ AHT Insurance
* # Mike Kelly	^ AHT Insurance
Liz Padova Hanson	ANZ Bank
* Tom Hunt	Association For Financial Professionals
* David Clark	^ BDO
Joseph O'Meara	^ BDO
* Ken Eye	^ BDO
* Slaiman Atayee (Sly)	^ BDO
Patricia Oreta (Trisha)	^ Blaylock Van LLC
Eric Standifer	^ Blaylock Van, LLC
* # Nyagaka Ongeru	^ Blaylock Van, LLC
Amanda Helfrich	^ Citi
* # Chris Tynan	^ Citi
Craig Marone	^ Citi
Jennifer Tanseco	^ Citi
John Finnigan	^ Citi
Kerri Escobedo	^ Citi
Naomi Balodemas	^ Citi
* Robert Peri	^ Citi
Raymon Pal	Convera
John Wood	^ Corpapay
# Usman Fazili	^ Corpapay
Daniel James Goodwin	^ Crown Agents Bank
* # Duarte Pedreira	^ Crown Agents Bank
Mark Tait	^ Crown Agents Bank
# Ciara Joyce	^ Ecobank
Fatima Akdim	^ Ecobank
Jeremy Awori	^ Ecobank
Kevin James	^ Ecobank
Saliou Diagne	^ Ecobank
* Sebastian Ashong-Katai	^ Ecobank
Jonathan Barron	Gallagher
Elizabeth O'Brien (Betsy)	JPMorgan
Nancy Votava	JPMorgan
* Bob Stark	^ Kyriba
Julie Hepner	^ Kyriba
Meredith Little	^ Kyriba
Ashley Evans	^ Marsh
* Charmaine Davis	^ Marsh
* Gayle Jacobs	^ Marsh
# Michael J. Rastigue III	^ Marsh

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* Ruth Kochenderfer	Marsh
Daniele Livermon	^ Marsh McLennan
* # Rusty Smith	McGriff Insurance
* Warren Fischi	McGriff Insurance
# April Crowell Thurfield	^ Mercer
Annalisa Plachesi	MFS Africa
David Pitts	^ Paycode Limited
Mike Meaney	^ Paycode Limited
# Ralph Pecker	^ Paycode Limited
Pardon Muzenda	Rand Merchant Bank SA
Mark E. Chiaviello	RMB Securities (USA) INC.
Kurt Rader	Santander
* Godfrey Mwanza	^ Standard Bank
# Maureen Harrington	^ Standard Bank
Robert Cleasby	^ Standard Bank
Stella Abola	^ Standard Bank
# Ayo Omoogun	^ Standard Chartered Bank
* Karen Hom	^ Standard Chartered Bank
Alexa Trummer	^ StoneX
* Amit Sahani	^ StoneX
Byard Bridge	^ StoneX
# Katherine Zaveri	^ StoneX
Sue-Ellen Speight	^ StoneX
* James Colassano	The Clearing House
* Brian E Nelson	U.S. Department of Treasury
* Julien Tunney	U.S. Department of Treasury
* Patrick Hu	U.S. Department of Treasury
* Peter Briggs	World Bank

LEGEND

- * Speaker
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EVENT TIPS

Here is some information to help maximize your conference experience.

ASPEN INSTITUTE

- Conference will begin on time and the conference schedule will adhere to the times noted in the agenda.
- Wi-Fi is available to all attendees. Connect to “AI-GUEST” and accept the Terms & Conditions. No password is necessary.
- Restrooms are located down behind the 7th and 8th floor conference rooms.
- Two private phone booths are available on the 8th floor, near the restrooms, for attendees.
- Traveling directly from the conference? There is a coat closet to store luggage securely.

HAPPY HOUR

Monday: [The Lady Bird Rooftop Lounge \(Kimpton Hotel\) | 1315 16th St NW](#)
Hosted by Citi and Crown Agents Bank

Tuesday: [Casta’s Rum Bar | 1121 New Hampshire Ave NW](#)
Hosted by Corpay

LODGING

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1250 22nd Street NW
(202) 857-3388

[The Generator](#)
1900 Connecticut Ave. NW
(202) 332-9300

[Fairmont Washington D.C. Georgetown](#)
2401 M St NW
(202) 429-2400

[Washington Marriott Georgetown](#)
1221 22nd St NW
(202) 872-1500

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MEMBERS CHAT INFORMATION

We are delighted to announce the kick-off of **Members Chat**.

Members Chat is a great new tool to facilitate peer-to-peer dialogue. This allows for quick and effective communication among the Roundtable Members to share information, solutions, and knowledge. The **Members Chat** is only open to Roundtable Members (NGOs, Higher Education Institutions, and Foundations) and will **not** include service providers or affiliates. This will allow for a free exchange of ideas. [Chatham House Rules](#) will apply to all conversations. This forum for chat is intended to be a positive exchange of information, ideas and to ask questions.

You can connect directly with [Members Chat log-in](#) or you can go to the website <https://www.treasurersroundtable.org/> and click on **Members Chat** on the upper right of the screen to register and then begin dialogue with your peers. Specific categories have been set up to facilitate conversations.

You may also reach out to info@treasurersroundtable.org to request membership.

After registering for the Members Chat, approvals may take up to 24-48 hours.