

**Higher Education Investing Seminar
Presenter Biographies (in order of presentation)**



David Fiedler – LCMS Foundation

Mr. Fiedler has been president of the LCMS Foundation since February 2013. In that role, he oversees the Foundation’s trust and investment activities, provides direction to its gift-planning and other fundraising efforts, communicates with partner organizations, and assists the board of trustees in establishing the organization’s overall course and direction.

Prior to his current position, Dave served the LCMS General Services department as executive director where he oversaw corporate operations and provided business services and facility-support management for three facilities housing 550 employees. From 1997-2005, he was senior manager for LCMS Human Resources. His career with the LCMS began in 1995 as a development officer with the LCMS Foundation.

Dave attended Washington University in St. Louis and was commissioned as an officer in the Army Reserves upon graduation. Dave served eight years, receiving an honorable discharge in 2001. He holds degrees in German and Political Science, as well as an MBA.

Richard J. Harper – NEPC



Mr. Harper joined NEPC in 2001, and his investment experience dates back to 1993. Rich is a member of NEPC’s Endowment & Foundation Consulting Group. He assists clients with the development of investment policies and objectives, the evaluation and selection of investment managers, and the measurement and analysis of investment performance. With his background in research, he served as a “devil’s advocate” on the Alternative Assets Committee, guides technical research projects, conducts capital market analyses and research, and mentors a team of Research Analysts. He is also a member of the Real Assets Advisory Group.

Prior to joining NEPC, Rich worked as a Financial Institution Examiner for the Federal Deposit Insurance Corporation, where he performed specialized examinations of financial institutions, instructed assistant examiners at the FDIC’s national training center, and served as the Capital Markets Specialist at his field office. He served with the FDIC for eight years.

Rich holds a B.S.B.A. in International Business/Finance from American University and an M.B.A. in Finance from Babson College. He is a CFA charter holder and a member of both the CFA Society of Buffalo, and the CFA Institute. He is also a former “grader” for the CFA Level III Exam. He became a Chartered Alternative Investment Analyst designee in 2005. Rich serves in leadership positions in Buffalo-Niagara Frontier branch of Boys Scouts America and is a basketball coach in Hamburg, New York.



Phill Nelson – NEPC



Mr. Nelson, CFA, is Principal, Director of Asset Allocation. Phillip joined NEPC in 2011 having been in the investment industry since 2002. Phillip is involved in NEPC's asset allocation research and his responsibilities include maintaining and developing asset allocation models and frameworks used broadly by NEPC clients. In addition, Phillip is involved in NEPC's multi-asset research and due diligence activities for Global Asset Allocation, Risk Parity, and Target Date Fund strategies. Phillip is a member of NEPC's Asset Allocation Committee, which sets the firm's investment assumptions and broad recommendations for clients. He is also a member of the Traditional Assets Due Diligence Committee and the Liability-Driven Investment (LDI) Advisory Group.

Prior to becoming Director of Asset Allocation, Phillip served in the Traditional Assets Research group overseeing fixed income and multi-asset manager research. Before joining NEPC, Phillip spent over six years with Pinnacle West Capital Corporation, where he was ultimately responsible for overseeing Pinnacle West's Pension Plan, 401(k), OPEB, Nuclear Decommissioning Trust and Foundation. During this time, Phillip developed extensive experience with LDI strategies and implemented a LDI program for Pinnacle West's defined benefit plan.

Phillip received his B.A. in Political Science from the University of California Irvine. He also holds the Chartered Financial Analyst designation.

James DiGiuseppe – Wellington



Mr. DiGiuseppe, CAIA, is Assistant Vice President and Account Manager. As an account manager within Wellington Management's Global Relationship Group, James helps deepen the relationship and consultative partnership with clients, serving as a conduit to ensure that the full range of resources and services of the firm are brought to bear on their behalf. He assists clients with long-term investment strategy and policy issues, evaluates portfolio risks and performance, and meets regularly with clients to discuss investment- and business-related issues.

James joined Wellington Management in 2007. Prior to his current role, he held positions in the firm's Sydney office (2014 – 2016), Chicago office (2010 – 2014), and Boston office (2007 – 2009, 2010). He is now located in the Boston office.

James earned his MBA, with distinction, from the University of Iowa CIMBA Program in Asolo, Italy (2010), and his BS in finance and management from the University of Kansas (2007). He also holds the Chartered Alternative Investment Analyst designation.



Gardiner Holland – Wellington

Mr. Holland is Vice President and Investment Director for Wellington. As an investment director in Equity Product Management, Gardiner works closely with investors to help ensure the integrity of the investment approaches. This includes meeting with investment teams on a regular basis and overseeing portfolio positioning, performance, and risk exposures, as well as developing new products and client solutions and managing business issues such as capacity, fees, and guidelines. He also participates in meetings with clients, prospects, and consultants to communicate investment philosophy, strategy, positioning, and performance.

Prior to joining Wellington Management in 2012, Gardiner spent three years at Cambridge Associates (2007 – 2010), most recently as a senior associate team leader within the consulting group.

Gardiner earned his MBA from the Tuck School of Business at Dartmouth College (2012), as well as his BA in history from Bowdoin College (2006). Additionally, he holds the Chartered Financial Analyst designation and is a member of the CFA Institute and the CFA Society Boston.



Curt Sherman – Wellington

Mr. Sherman is Senior Director of Strategic Initiatives and Investments at Concordia University, Nebraska. Curt is a Certified Public Accountant and has worked in higher ed for 12 years where he has served in a number of roles; from Controller to enrollment management to his current role of leading strategic initiatives on Concordia's campus. One of these strategic initiatives has been to work with Concordia's Investment Committee to recast its focus and attention towards governance and away from operations and management.



Robert Felice – Prudential

Mr. Felice, CFA, is Principal, Client Advisory for PGIM Fixed Income, responsible for new business development. Mr. Felice is focused on large US defined benefit plans, hedge fund of funds, endowments/ foundations, as well as the subadvisory space. He has more than twenty years of fixed income portfolio management experience. Mr. Felice joined the Firm in 2007 from Seix Advisors, where he was a Partner, Senior Portfolio Manager of fixed income total return and stable value separate accounts. Prior to joining Seix in 2000, Mr. Felice worked at PGIM Fixed Income for thirteen years as a portfolio manager for various fixed income strategies. Earlier, he was a financial analyst for Manufacturers Hanover Leasing Corporation. Mr. Felice received a BS in Finance from Villanova University, and an MBA from New York University. He holds the Chartered Financial Analyst (CFA) designation.



Michael Collins – Prudential

Mr. Collins, CFA, is a Managing Director and Senior Investment Officer for PGIM Fixed Income. He is also senior portfolio manager for Core Plus, Absolute Return, and other Multi-Sector Fixed Income strategies. Previously, Mr. Collins was a High Yield Portfolio Manager and Fixed Income Investment Strategist. He continues to work closely with the high yield team and other credit teams on portfolio strategy and construction. Earlier he was a credit research analyst, covering investment grade and high yield corporate credits. Additionally, he developed proprietary quantitative international interest rate and currency valuation models for our global bond unit. Mr. Collins began his career at the Firm in 1986 as a software applications designer. He received a BS in Mathematics and Computer Science from the State University of New York at Binghamton and an MBA in Finance from New York University. Mr. Collins holds the Chartered Financial Analyst (CFA) designation and is a Fellow of the Life Management Institute (FLMI).



Mark Cannon – LCMS Foundation

Mr. Cannon is Senior Vice-President and CFO for the LCMS Foundation. He is responsible for managing the accounting and investment areas of the Foundation, and for managing administrative functions of the Foundation. Prior to joining the Foundation in 2013, Cannon worked in the banking industry for nearly 15 years, serving in a variety of financial reporting and analysis roles at Commerce Bancshares. Cannon holds a Bachelor of Arts Degree in Economics from Washington University and a Master of Arts Degree in Economics from Vanderbilt University. He is also a Certified Public Accountant.