

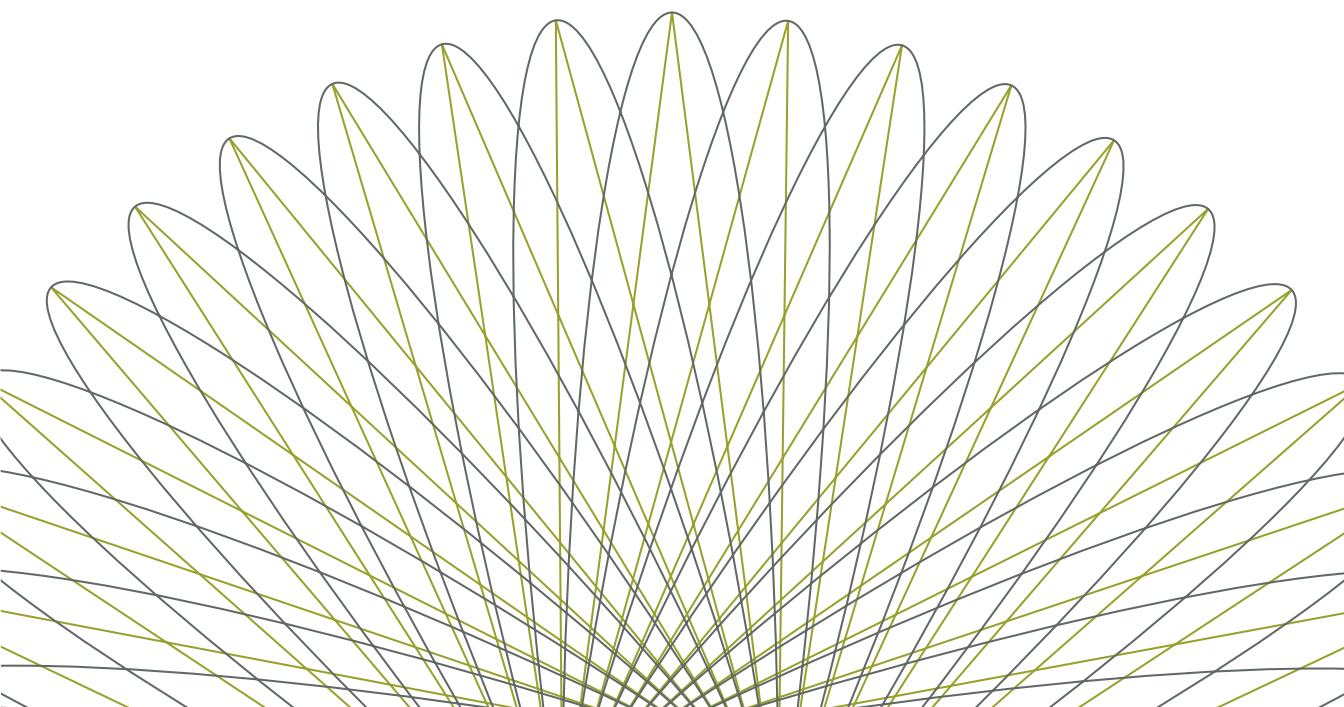
The USC Center on Philanthropy & Public Policy
in partnership with J.P. Morgan Philanthropy Centre

A FAMILY PHILANTHROPY FORUM

Donors & Their Families

Enduring Issues, Emerging Themes,
Endless Possibilities

MAY 16, 2019



Dear Friends,

Thank you for joining us for our 2019 Family Philanthropy Forum, *Donors & Their Families: Enduring Issues, Emerging Themes, Endless Possibilities*, in partnership with J.P. Morgan Philanthropy Centre. This is an opportunity for donors and their families to engage with peers and experts about the challenges and opportunities for more meaningful and impactful giving. Over the course of the day, you will hear from and interact with leading experts who are at the forefront of family-centered philanthropy and donors who will share lessons from their philanthropic journeys.

The day begins with Lisa Sobrato Sonsini, president of the Sobrato Family Foundation and Rick Williams, the foundation's CEO. Lisa's parents, John A. and Susan Sobrato, and her brother, John M. Sobrato, were the first multigenerational signatories of the Giving Pledge, with a commitment to strengthening K-12 education, workforce development, and the nonprofit sector in Silicon Valley. The forum will conclude with a discussion of prizes and competitions to spur greater innovation and impact, featuring Robin Kramer, who is leading the Smidt Foundation's annual prize for teaching excellence in skilled trades, and Nadine Watt, who initiated a competition for innovative solutions to end homelessness in Los Angeles.

In between these two plenary panels, we will provide a set of small group discussions on choices at the heart of structuring family philanthropy – including vehicles for giving, family governance, and engaging the next generation. A second set of intimate conversations will explore strategies for greater impact on early childhood, nonprofit leadership, and impact investing for women and girls.

We hope this jam-packed day will provide inspiration for those seeking to make their giving smarter, as well as an opportunity to kick-start important conversations about your philanthropic goals and priorities.

A special thanks to our breakout session sponsors – the Jewish Community Foundation of Los Angeles and the Annenberg Foundation – and for the inspiration, guidance and support provided by the members of The Center on Philanthropy & Public Policy's Director's Circle.

I hope that today's program informs and inspires you to take the next step toward more impactful giving with your family.

Thank you for joining us.



James M. Ferris
DIRECTOR

Program

10:30–11:00AM

Registration

11:00–1:00PM

Welcome

James M. Ferris, DIRECTOR,
THE CENTER ON PHILANTHROPY & PUBLIC POLICY

Opening Plenary and Lunch

Learning along the Way: The Sobrato Family Story

The Sobrato family has lived and worked in Silicon Valley for four generations and have a long history of philanthropy in the region. Lisa Sobrato Sonsini will discuss her family's philanthropic journey and how they have successfully engaged the next generation along with Rick Williams, CEO of the Sobrato Family Foundation

Lisa Sobrato Sonsini, BOARD PRESIDENT AND TRUSTEE,
SOBRATO FAMILY FOUNDATION

Rick Williams, CHIEF EXECUTIVE OFFICER,
SOBRATO FAMILY FOUNDATION
in conversation with

Bob Graziano, MANAGING DIRECTOR & VICE CHAIRMAN,
J.P. MORGAN PRIVATE BANK

1:00–1:15PM

Break

1:15–2:15PM

Approaches for Meaningful Giving

Sponsored by Jewish Community Foundation of Los Angeles

These interactive sessions will explore structures and choices related to giving, illustrating the myriad ways in which philanthropic values are introduced and shared by the family.

Vehicles for Giving

Leah M. Bishop, CO-CHAIR, TRUSTS & ESTATES, LOEB & LOEB LLP
Marvin Schotland, PRESIDENT & CEO,
JEWISH COMMUNITY FOUNDATION OF LOS ANGELES

Family Governance

Michael Firestein and Jon Glaser, TRUSTEES,
MAX FACTOR FAMILY FOUNDATION

Jamie Hackleman, EXECUTIVE DIRECTOR,
J.P. MORGAN PHILANTHROPY CENTRE

Michael Harman, WEALTH ADVISOR, J.P. MORGAN PRIVATE BANK

Engaging the Next Generation

Joline Godfrey, FOUNDER & CHIEF CREATIVE OFFICER,
THE UNEXPECTED TABLE

Lani Sapanza, HOST, CMEG

2:15–2:30PM

2:30–3:30PM

3:30–3:45PM

3:45–5:00PM

5:00–5:45PM

Break

Strategies for Greater Impact

Sponsored by the Annenberg Foundation

These interactive sessions will examine how donors can maximize their impact on the issues and causes they care about most.

Working Together: Philanthropy and Early Childhood Development

Parker Blackman, EXECUTIVE DIRECTOR,
LA PARTNERSHIP FOR EARLY CHILDHOOD INVESTMENT

Lisa Parker, PRESIDENT & EXECUTIVE DIRECTOR,
LAWRENCE WELK FAMILY FOUNDATION

Marilyn Stein, CHAIRMAN, TIKUN OLAM FOUNDATION

Impact Investing for and by Women and Girls

Celia Bernstein, TRUSTEE,
DIANE AND NORMAN BERNSTEIN FAMILY FOUNDATION

Lisa Richter, MANAGING PARTNER, AVIVAR CAPITAL

Leadership for the Social Sector

Rudy Espinoza, EXECUTIVE DIRECTOR,
LEADERSHIP FOR URBAN RENEWAL NETWORK

Claire Peeps, EXECUTIVE DIRECTOR, THE DURFEE FOUNDATION

Belen Vargas, SENIOR VICE PRESIDENT, WEINGART FOUNDATION

Break

Closing Plenary

Prizes and Competitions

How can philanthropists achieve greater impact for giving in today's landscape? This panel discussion will explore prizes and competitions as a strategy for innovation.

Robin Kramer, MANAGING DIRECTOR, SMIDT FOUNDATION

Nadine Watt, PRESIDENT, WATT COMPANIES
in conversation with

Wendy Wachtell, PRESIDENT, JOSEPH DROWN FOUNDATION

Reception

Forum Speakers



Celia Bernstein

TRUSTEE, DIANE AND NORMAN BERNSTEIN
FAMILY FOUNDATION

Since 2010, Celia has served as the Director of Development for Westside Family Health Center (WFHC), a federally qualified community health center that provides health care and education to low income and uninsured individuals and families. She oversees development, organization and implementation of all fundraising activities at WFHC related to foundations, corporations, annual and major donations, special events and the capital campaign. Previously, Celia was the Los Angeles Director of Jewish Funds for Justice (formerly the Shefa Fund) and the Associate Director of Development at Liberty Hill Foundation coordinating the Donor-Advised Funds program. Before working in philanthropy and nonprofit development, Celia worked as a clinical social worker in community mental health. Celia is on the Board of her parents' family foundation, the Diane and Norman Bernstein Family Foundation, in Washington DC, which supports Jewish and DC nonprofits. She serves on the Advisory Council of Liberty Hill Foundation and the Family Foundation Advisory Committee for Southern California Grantmakers.



Leah M. Bishop

CO-CHAIR, TRUSTS & ESTATES, LOEB & LOEB

Leah Bishop is a partner at Loeb & Loeb LLP where she focuses her practice on tax planning for high net worth individuals and closely held businesses and in the administration of estates and trusts. Her areas of focus cover a wide range of industries, including real estate,

manufacturing, entertainment and professional services. Passionate about philanthropy, Leah also has extensive experience in the areas of charitable giving and tax-exempt organizations. Leah's estate planning experience includes all matters pertaining to high net worth individuals, including probate court procedures, revocable and irrevocable trusts, and sophisticated transfer tax techniques. She also represents many leading private foundations and public charities. Her work on behalf of these organizations involves all aspects of tax and corporate nonprofit law. She also represents donors in complex charitable gift agreements. Leah is a trustee of the Jewish Community Foundation and serves on the advisory board of the Harriett Buhai Center for Family Law.



Parker Blackman

EXECUTIVE DIRECTOR, LA PARTNERSHIP FOR
EARLY CHILDHOOD INVESTMENT

Blackman is Executive Director of the LA Partnership for Early Childhood Investment. He is a senior executive and strategist with a proven track record of scaling start up efforts and managing organizational change and growth. Blackman has worked in the early childhood health and education space for over a decade. While serving as Chief Operating Officer and West Coast Managing Director at Fenton, the largest public interest communications firm in the nation, Blackman helped the LA Partnership establish its original vision, mission, and goals, and created the strategy for LA's first ever Baby Futures Summit.

Blackman has worked with many nonprofits and foundations in the early childhood development field, including the Atlas Family Foundation, First 5 LA, Playworks, and the Robert Wood Johnson Foundation. In addition to his role with the LA Partnership, Blackman also serves as a consultant to family foundations with JMC Philanthropic Advisors.



Rudy Espinoza

EXECUTIVE DIRECTOR, LEADERSHIP FOR URBAN
RENEWAL NETWORK

Rudy Espinoza is the Executive Director of Leadership for Urban Renewal Network (LURN), a community development organization designing innovations to responsibly revitalize low-income, urban areas. At LURN, he leads their advocacy efforts in support of the working poor and their micro-finance programs that support micro-entrepreneurs. Rudy specializes in designing economic development initiatives in low-income communities, researching the informal economy, building private/nonprofit partnerships, and training the working poor to participate in the socio-economic revitalization of their neighborhoods. He serves on the Board of Transportation Commissioners for the City of Los Angeles as well as the Commission on Revenue Generation, the Advisory Boards of the LA Development Fund, Investing in Place and the LA Food Policy Council, and the Board of Directors for Esperanza Community Housing Corporation. Rudy holds degrees in Business Administration and Urban



James M. Ferris

DIRECTOR, THE CENTER ON PHILANTHROPY
& PUBLIC POLICY

James M. Ferris is the founding Director of The Center on Philanthropy & Public Policy at the University of Southern California. He is a Professor in the Sol Price School of Public Policy and holds the Emery Evans Olson Chair in Nonprofit Entrepreneurship and Public Policy. He specializes in the economics of the public and nonprofit sectors, public finance and public policy and is a Fellow of the National Academy of Public Administration. Dr. Ferris' research focuses on the shifting roles of the public, nonprofit and for-profit sectors in governance and the economy. He is currently investigating the changing landscape of philanthropy; roles and strategies for foundation engagement in public policymaking; philanthropic-government partnerships; and place-based philanthropy.



Michael A. Firestein

TRUSTEE, MAX FACTOR FAMILY FOUNDATION

Michael A. Firestein is a partner in the Los Angeles office of Proskauer Rose LLP, an international law firm and currently serves as Proskauer’s Vice-Chair of the Litigation Department and Co-Head of West Coast Litigation. Michael handles a wide range of commercial litigation on behalf of, among other enterprises, financial institutions, private equity funds, securities brokerages, fiduciaries, and entertainment corporations. In recent years, Michael has also been a lead lawyer in trying several high profile confirmation plan proceedings in complex bankruptcy restructurings throughout the United States. Michael received his Juris Doctor degree from the Northwestern University School of Law in Chicago, Illinois, as well as a Bachelor of Arts degree from Brown University. He currently serves as a Trustee of the Max Factor Family Foundation, as well as a member of the Board of Directors and Executive Committee for Concern Foundation for Cancer Research (serving as its President from 1994-1996), and a member of the Board of Directors of Bet Tzedek, a Los Angeles-based provider of pro bono legal services. Michael is married to Dr. Deborah Krakow, Professor and Chair, Department of Obstetrics and Gynecology, and Professor, Departments of Orthopaedic Surgery and Human Genetics at the David Geffen School of Medicine at UCLA. Michael and Debbie have two adult children.



Jon Glaser

TRUSTEE, MAX FACTOR FAMILY FOUNDATION

Jonathan M. Glaser is the Founder and Chief Investment Officer of JMG Capital Partners, L.P. JMG has been investing in various capital markets and financing strategies since 1992. Prior to founding JMG, Jon was a member floor trader on both the American Stock Exchange and Pacific Stock Exchange. Jon received a Juris Doctor degree from the Boalt Hall School of Law at the University of California at Berkeley, as well as a Bachelor

of Arts degree from the University of California at Berkeley. He currently serves as a Trustee of the Max Factor Family Foundation, a Trustee of The L.A. ’84 Foundation, and a Trustee of the UC Berkeley Foundation. Jon also sits on the Board of Directors of Hudson Pacific Properties, a New York stock exchange listed real estate investment trust and is also a member of the World Presidents Organization’s Los Angeles chapter. Jon is married to Dr. Nancy Motzkin Glaser, whom he met as an undergraduate at UC Berkeley.



Joline Godfrey

FOUNDER & CHIEF CREATIVE OFFICER,
THE UNEXPECTED TABLE

Joline Godfrey has been an innovator in financial education for children and parents for over two decades. Godfrey is the author of Our Wildest Dreams: Women Making Money, Having Fun, Doing Good; No More Frogs To Kiss: 99 Ways to Give Economic Power to Girls; Twenty secrets to Money and Independence: The DollarDiva’s Guide to Life; and Raising Financially Fit Kids. The founder of Independent Means, she created a unique developmental approach to financial education, giving new families tools for raising children growing up in the midst of abundance. That company was acquired in 2015. Godfrey is now building a new platform, The Unexpected Table, to offer products and services for nurturing financially mindful children and thriving families. Godfrey was a Kellogg Leadership Fellow and the recipient of the Leavey Award for Excellence, as well as the Beta Gamma Sigma Entrepreneurship Award. Recognized in features for The Today Show, Oprah, Fortune, Business Week, The New York Times, and more, Ms. Godfrey is a frequent speaker and consultant worldwide. She lives in Ojai, California and Tenants Harbor, Maine.



Bob Graziano

MANAGING DIRECTOR & VICE CHAIRMAN, J.P.
MORGAN PRIVATE BANK

Bob Graziano is responsible for corporate strategy and development for J.P. Morgan’s Private Bank in the Western Region. In this capacity, Bob provides strategic advice and support to the regional leadership team on expanding and building the private banking business in the West. Additionally, Bob plays a lead role on key initiatives in the region and builds alliances across J.P. Morgan Chase’s lines of business. Previous to his current role, Bob was the Southern California Market Manager for J.P. Morgan’s Private Bank. Before joining J.P. Morgan, Bob was Managing Director of the Family Advisory Services Group at Northern Trust. Prior to joining Northern, Bob spent 18 years with the Los Angeles Dodgers, serving his final six years there as the Club’s President & Chief Operating Officer. He was named to that post on March 19, 1998 upon the sale of the team to FOX, becoming only the 11th President in franchise history. Bob has built a strong reputation in Southern California due to his community involvement and civic leadership. Bob is Chair of the Los Angeles Sports and Entertainment Commission and the immediate past Chair and current board member of the LA84 Foundation, which is the legacy organization created after the 1984 Olympic Games. Bob is also a board member of the Los Angeles Business Council and serves as an advisory board member of the USC Sports Business Institute Club and the Los Angeles Chargers. Bob and his wife, Wendy Wachtell, have five sons.



Jamie Hackleman

EXECUTIVE DIRECTOR, J.P. MORGAN
PHILANTHROPY CENTRE

Jamie Hackleman is the Executive Director of the J.P. Morgan Philanthropy Centre and serves as a Senior Philanthropy Advisor at J.P. Morgan Private Bank. The Philanthropy Centre provides clients with insights and

services to help meet their financial and philanthropic goals through innovative advice, thought leadership, and learning opportunities. Jamie has over a decade of experience in non-profits and foundations, working on issues ranging from international development and global health, to the environment, arts and culture, and poverty alleviation. Prior to J.P. Morgan, Jamie worked with Paul G. Allen’s philanthropy team at Vulcan where she focused on identifying, building, and managing high impact partnerships. Before Vulcan, Jamie was at the Bill & Melinda Gates Foundation where she served in multiple roles, including managing partnerships with philanthropists who co-funded projects with the foundation, and as a special assistant to the president of the Global Policy & Advocacy division. She has also worked at PATH, Save the Children UK, and was a Fulbright Scholar in Indonesia. Jamie received a MSC in International Health Policy from the London School of Economics and a BA in Political Science from Pacific Lutheran University.



Michael Harman

WEALTH ADVISOR, J.P. MORGAN PRIVATE BANK

Michael Harman is the Wealth Advisor for J.P. Morgan’s Private Banking business in Orange County and San Diego. Mike joined J.P. Morgan as a wealth advisor after 12 years of practicing law and recently relocated to Southern California from the Seattle area. As a wealth advisor, Mike works with clients and their professional advisors on tax-efficient strategies to hold and manage wealth, and when the time is right, transfer wealth across generations and to charitable organizations. He is a member of both the Washington and Oregon State Bar and most recently was a partner at the Seattle law firm of Helsell Fetterman LLP. Over the course of his career, Mike has helped high net worth families with a wide array of estate planning and tax issues. His expertise includes lifetime gifting programs to transfer wealth and reduce taxes, succession planning for family owned businesses, and planning for education, retirement and charitable giving. Mike received a B.A. in law and society from University California Santa Barbara; a J.D. (cum laude) from Gonzaga University School of Law and a Masters in Tax Law from the University of Washington School of Law. During his career, Mike has been recognized as a “Super Lawyer” by Washington Law and Politics Magazine and a “Five Star Wealth Manager” in Seattle Magazine.



Robin Kramer

MANAGING DIRECTOR, THE SMIDT FOUNDATION

Robin Kramer is managing director of the Smidt Foundation, whose flagship philanthropic initiative, Harbor Freight Tools for Schools, she led over the past three years. Established by the Harbor Freight Tools CEO Eric Smidt, the initiative is borne out of the belief that access to quality education in the skilled trades gives high school students pathways to graduation, opportunity, good jobs, and a workforce our country needs. She brings to this work a varied background in public, private, and nonprofit leadership. Previously, she was commissioner for the Port of Los Angeles and served as chief of staff to two Los Angeles mayors, Antonio Villaraigosa and Richard Riordan—the first woman in the city’s history to serve in this post. She has held senior positions at the Broad Foundation, the California Community Foundation, and the Annenberg Retreat at Sunnylands; she also worked extensively as an independent consultant for a variety of entities focused on advancing access, equity, and engagement in civic life, public education, and the arts. Earlier in her career, she was chief deputy for Los Angeles city councilmembers Richard Alatorre and Bob Ronka, director of the Democratic Party of Southern California, and executive director of two nonprofits (Coro and Reboot). She helped lead several local ballot measure campaigns, including securing broad reforms in the Los Angeles Police Department. A volunteer board member for many community-serving nonprofits over the years, she completed two terms as chair of the Pitzer College board of trustees, and she is currently a member of the board of the John Randolph Haynes and Dora Haynes Foundation.



Lisa Parker

PRESIDENT & EXECUTIVE DIRECTOR,
LAWRENCE WELK FAMILY FOUNDATION

Lisa Parker brings 30 years of experience in philanthropy and nonprofit management to her work with philanthropic families. Since 1997 Lisa has been President and Executive Director of the Lawrence Welk Family Foundation, leading the foundation’s poverty initiatives, seeding the youth giving movement and creating youth philanthropy programs for the family’s 4th generation. In 2009 Lisa founded Family Circle Advisors where she and her team help families increase the impact of their giving and navigate the complex family relationships critical to the success of a family foundation or enterprise. Family Circle Advisors also facilitates family retreats and is a leader in providing experiential team building events for family foundations and family businesses. Lisa is certified by 21/64 (a division of The Andrea & Charles Bronfman Philanthropies) as a multi-generational advisor to families.



Claire Peeps

EXECUTIVE DIRECTOR, THE DURFEE FOUNDATION

In her role as the Durfee Foundation’s executive leader, Claire Peeps has shaped the foundation’s programs since 1997. The Durfee Foundation invests in people and possibilities in Los Angeles, and is best known for its work in leadership development, community building and civic problem solving, principally through its Stanton Fellowships, Sabbatical program and Springboard Fund. Claire is widely recognized in the community for her progressive leadership in both the philanthropic and nonprofit sectors. She has served as the Chair of Southern California Grantmakers, Chair of Grantmakers in the Arts, President of the Los Angeles County Arts Commission, Vice Chair of the California Council for the Humanities, and is a Senior Fellow of the Luskin School of Public Policy at UCLA. She is an adjunct professor at USC’s Price School

of Public Policy, where she was named Outstanding Faculty in 2016. In 2015, she received the Award for Excellence in Leadership from the Joint Affinity Groups for her mentorship through Emerging Practitioners in Philanthropy. Prior to joining Durfee, Claire was the associate director of the Los Angeles Festival, an international arts festival led by Peter Sellars; the publisher of High Performance Magazine; and the director of education at The Friends of Photography/The Ansel Adams Center. Her book, *Activists Speak Out*, was published by St. Martins Press in 2001. Her writing has appeared in *Zocalo*, *Time*, *Saturday Evening Post*, the *Getty Iris* and *Good Magazine*.



Lisa Richter

MANAGING PARTNER, AVIVAR CAPITAL

Lisa Richter is a co-founder and managing partner of Avivar Capital, a Los Angeles-based, national consultancy and SEC-registered investment advisor focused exclusively on the design and execution of impact investing strategies. Lisa brings three decades of fund management and impact investing experience spanning asset classes, return expectations, geographies and issue areas, and frequently incorporating place-based or sector focus to increase equitable access to opportunity. Lisa authored the *Grantmakers In Health Guide to Impact Investing* and co-authored several guides to community foundation and donor impact investing. She co-designed the Mission Investors Exchange Impact Investing Institute and continues as a lead impact investing trainer with partner organizations nationwide. Lisa is a Senior Fellow with The Philanthropic Initiative, and serves or has served as a director or advisor to the Center for Community Development Investments of the Federal Reserve Bank of San Francisco, Bank of America National Community Advisory Council, Dignity Health’s Community Economic Initiatives Subcommittee, Well Being Trust, UCLA Center for Healthier Children, Families and Communities, American Journal of Preventative Medicine, Women Leading the Way in Impact Investing, CDFI Coalition, US Social Investment Forum, and New Markets Tax Credit Coalition. Lisa holds a BA and an MBA from the University of Chicago.



Lani Sapanza

HOST, CMEG

Lani comes from a family owned food business originating in Hawai’i and now located in Torrance, CA. She is a third-generation family member and currently sits on her family council. She is married with a son and another child on the way. Professionally, Lani is managed by Marki Costello from CMEG and hosts on TV, digital media and live platforms, such as the Super Bowl. Presently, she hosts a weekly food show on Tastemade Network as a cook and food enthusiast. Lani graduated in 2008 from Marshall School of Business and continues to participate as an active member of the Trojan Family.



Marvin Schotland

PRESIDENT & CEO, JEWISH COMMUNITY
FOUNDATION OF LOS ANGELES

Marvin I. Schotland is president and chief executive officer of the Jewish Community Foundation of Los Angeles, the largest central clearinghouse for Jewish philanthropists in Southern California. Mr. Schotland began his tenure at The Foundation in May 1989 as executive vice president after having served four years as the executive director of the Jewish Community Foundation of Greater Metrowest, New Jersey. He was previously executive director of the Jewish Community Foundation of Southern Arizona for two years. During his tenure at The Foundation, its assets have grown from \$90 million to more than \$1 billion. Mr. Schotland has served as chair of the Board of Southern California Grantmakers and is a member of the Board of Advisors of the University of Southern California's Center on Philanthropy and Public Policy. He serves on the Board of Directors of 35 family foundations. Under Mr. Schotland’s leadership over the past 30 years, The Foundation has distributed \$1 billion in grants. Mr. Schotland is often quoted in the industry press and has contributed op-eds to *The Washington Post*, *Forward* and the *Jewish Journal* on topics such as family philanthropy and Jewish community giving. Mr. Schotland earned his law degree at the University of Cincinnati.



**Lisa Sobrato
Sonsini**

BOARD PRESIDENT AND TRUSTEE, SOBRATO
FAMILY FOUNDATION

Lisa established the Sobrato Family Foundation in 1996 as a vehicle for multiple generations of the Sobrato family to unify their philanthropic giving for maximum impact. The Sobrato Family Foundation strives to make Silicon Valley a place of opportunity for all of its residents by promoting access to high-quality education, career pathways and essential human services. Under her leadership as Board President, SFF has grown tenfold in both assets and annual giving. For over 25 years, Lisa has been a strong advocate for the rights of disadvantaged youth in both the educational and foster care systems. She also works passionately as a catalyst for civic engagement among many of the rising leaders in Silicon Valley. Lisa currently serves on the Boards of Directors for KQED, KIPP Bay Area Schools, Silicon Schools, Silicon Valley Children's Fund and American Leadership Forum Silicon Valley. She has previously served as Board President for the San Jose Children's Discovery Museum, Child Advocates, The Good Tidings Foundation and Today's Youth Matter. Honors include the John W. Gardner Leadership Award from ALF Silicon Valley, Humanitarian of the Year from Hidden Villa, and San Mateo County Women's Hall of Fame Inductee. Lisa received a J.D. from Boalt Hall School of Law at UC Berkeley and a BA in Communication Studies from UCLA.



Marilyn Stein

CHAIRMAN, TIKUN OLAM FOUNDATION

Marilyn Stein (Mindy) is Chairman of the Tikun Olam Foundation, a support organization at the Jewish Community Foundation of Los Angeles, which she co-founded with her husband, Gene in 2001. They also established the Stein-Early Childhood Development Fund at the California Community Foundation in 2015. Mrs. Stein is an active community leader in Los Angeles, highly engaged and committed to addressing the needs of

infants and toddlers. She is a board member of ZERO TO THREE (Chair of Development Committee) and Children's Bureau of Southern California (formerly board chair). She has played a leadership role in various community endeavors. She serves on the Executive Committee of the Los Angeles Partnership for Early Childhood Investment. Also, she is a member of the Everychild Foundation and served on its Grant Screening Committee. Mindy and her husband, Gene live in La Canada and have three children and six grandchildren.



Belen Vargas

SENIOR VICE PRESIDENT, WEINGART FOUNDATION

Belen holds a juris doctor degree from the University of Southern California School of Law and received her bachelor's degree in communications from California State University, Los Angeles. Belen began her professional career in nonprofit legal services in Los Angeles County focused on advocacy and policy matters related to women's issues and school inclusion issues for children with disabilities. Immediately prior to joining the Foundation, Belen worked at Public Counsel on the Childcare Law Project, providing outreach and education for child care providers. Belen is a graduate of the Council on Foundations' Career Pathways leadership program. She serves on the Center for Effective Philanthropy Advisory Board, the Delta Aeromexico Latino Outreach Leadership Advisory Board, and the California State University, Los Angeles President's Council. Belen joined Weingart Foundation in 2000 as the Foundation's first Program Associate. In 2008, Belen moved into a management role at the Foundation as Associate Vice President, Grant Operations. In 2017, she assumed the role of Senior Vice President.



Wendy Wachtell

PRESIDENT, JOSEPH DROWN FOUNDATION

Wendy Wachtell is president of the Joseph Drown Foundation, a Los Angeles based private foundation that distributes approximately \$5 million annually to nonprofits in the Los Angeles area. Ms. Wachtell is responsible for all grant evaluation, site visits, recommendations to the Board of Directors and post-grant evaluation. In addition, Ms. Wachtell oversees the investment portfolio of just under \$100 million in assets and has been at the Foundation for over twenty-six years. She serves on a variety of boards including: Joseph Drown Foundation, Harvard-Westlake, The Rape Foundation; USC Price School Board of Councilors, The USC Center on Philanthropy & Public Policy and others. Prior to joining the Foundation, Ms. Wachtell was a field producer and planning editor for KCBS-TV in Los Angeles and a Legislative Assistant and speechwriter for Congressman Julian C. Dixon in Washington, D.C. She holds an MA in Journalism from USC and a BA from Wellesley College.



Nadine Watt

PRESIDENT, WATT COMPANIES

Nadine Watt is President of Watt Companies, where she oversees all commercial investment activities including acquisitions, development, and asset management for the company's six million square-foot portfolio of multifamily, industrial, office, and retail properties. Throughout her 20-year tenure at Watt Companies, Nadine has played significant roles in nearly all facets of the company's operations. She also oversees Watt Companies' oil and gas operations. An active business and community leader, Nadine is a member of the USC Board of Governors and the Marshall School of Business Board of Leaders, as well as the USC Price School of Public Policy. She is the first female Chair for the Los Angeles Business Council; she is on the Board of Brentwood School and she recently joined the Board of Visionary Women. Nadine received the

Century City Citizen of the Year Award in 2017 and the EY Entrepreneur of the Year award in 2018. She served on the publicly traded companies' boards of both First Century Bank and the New Home Company. A graduate of Georgetown University School of Foreign Service, Nadine also holds a Master of Arts degree from the School of Cinematic Arts at the University of Southern California. Nadine currently resides in Beverly Hills with her husband Andrew Jameson and their two daughters, Keira and Reese Jameson.



Rick Williams

CHIEF EXECUTIVE OFFICER,
SOBRATO FAMILY FOUNDATION

Rick Williams is the Chief Executive Officer of the Sobrato Family Foundation (SFF), one of Silicon Valley's largest philanthropic organizations. Prior to joining SFF, Mr. Williams was Founder and President of Realize Consulting Group, a management consultant firm focused on creating effective and sustainable solutions for philanthropic and nonprofit organizations throughout the United States. Mr. Williams also served as the Director of the Asset Funders Network, a national community of foundations and grantmakers advancing programs and policies that build and protect financial assets for low-income individuals. Mr. Williams also previously served as the National Programs Director at the Charles and Helen Schwab Foundation where he oversaw grantmaking in the areas of homelessness, substance abuse, foster youth, after-school services, and poverty prevention. Mr. Williams is currently on the boards of Northern California Grantmakers, Silicon Valley Children's Fund, and Fresh Lifelines for Youth (FLY). Mr. Williams holds a Bachelor of Science degree in clinical psychology from Washington State University and a Master of Arts degree in clinical psychology from Antioch University.

ABOUT THE USC CENTER ON PHILANTHROPY & PUBLIC POLICY

The USC Center on Philanthropy & Public Policy promotes more effective philanthropy and strengthens the nonprofit sector through research that informs philanthropic decision-making and public policy to advance community problem solving.

ABOUT THE J.P. MORGAN PHILANTHROPY CENTRE

The J.P. Morgan Philanthropy Centre works to enhance philanthropic impact by offering clients and their families strategic and innovative advice, opportunities for collaboration and broader thought leadership.



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