

AGENDA

Tuesday, October 18, 2022 | MANHATTA

6:00 – 8:00 PM

WELCOME RECEPTION

Manhatta, 28 Liberty Street, 60th floor, New York, NY

Please join us at Manhatta, perched 60 stories up in the heart of the financial district for cocktails, hors d'oeuvres and conversations with other clients and experts with similar philanthropic interests.

6:45 – 7:15 PM

SPECIAL PERFORMANCE

Manhatta, 28 Liberty Street, 60th floor, New York, NY

The evening features a special musical performance by two members of the **Zac Brown Band**, **John Driskell Hopkins (Hop)** and **Clay Cook**. During the performance, Hop, founder of Hop On a Cure, will share a personal story and discuss the foundation's commitment to supporting research to prevent, reverse, and cure ALS.

John Driskell Hopkins, founding member, vocalist, multi-instrumentalist & songwriter of the Grammy Award-winning Zac Brown Band; founder, Hop On a Cure
Clay Cook, songwriter, producer & musician, Zac Brown Band

Wednesday, October 19, 2022 | GOLDMAN SACHS HEADQUARTERS

8:30 AM

REGISTRATION

Main Entrance, 200 West Street, New York, NY

8:30 – 9:30 AM

*Optional**

THEMATIC BREAKFAST RECEPTION

Client Center, 43rd floor, Jeanette Loeb Room, 200 West Street, New York, NY

This thematic breakfast reception is an optional opportunity to network with experts and advisors in focused philanthropic areas, including visual and performing arts, family philanthropy, impact investing and ESG, equity and inclusion, environment, community, veterans, higher education, women, and behavioral health.

10:00 – 10:15 AM

WELCOME REMARKS

Ground Floor Auditorium, 200 West Street, New York, NY

John Mallory, co-head of Global Private Wealth Management, Goldman Sachs

10:15 – 11:00 AM

CREATING AN IMPACTFUL PHILANTHROPIC STRATEGY

Three philanthropic experts explain how major donors can create, structure and sustain effective philanthropy to achieve their broader goals.

Grace Nicolette, vice president of Programming & External Relations, Center for Effective Philanthropy

Dr. Josh Baron, partner, Banyan Global Family Business Advisors; visiting lecturer in Executive Education at Harvard Business School

Katherina 'Kat' Rosqueta, executive director, Center for High Impact Philanthropy at the University of Pennsylvania

Moderated by **Karey Dye**, president of the Goldman Sachs Philanthropy Fund & Ayco Charitable Fund, Goldman Sachs

11:00 – 11:20 AM

CLAIM YOUR CONFIDENCE AND COMMAND YOUR AUDIENCE

Leading yet another fundraising event? Learn how to engage, motivate and inspire donors to rally support behind a cause.

Lydia Fenet, ambassador, Christie's Auction House; auctioneer & author

11:20 AM – 12:00 PM

PEOPLE WITH PURPOSE: THE JOURNEY OF TWO PHILANTHROPISTS

Hear insights from two philanthropic leaders who will highlight their personal stories and inspiration for evoking change and establishing a defined legacy.

Wendy Paulson, chairman, Bobolink Foundation

Doug Kimmelman, senior partner & founder, Energy Capital Partners; founder, Carol Kimmelman Athletic & Academic Campus

Moderated by **Meena Flynn**, co-head of Global Private Wealth Management, Goldman Sachs

12:00 – 12:30 PM

PICK UP LUNCH & TRANSITION TO BREAKOUTS

12:30 – 1:15 PM

FIRST BREAKOUT SESSIONS

1. CLAIM YOUR CONFIDENCE AND COMMAND YOUR AUDIENCE: Q&A WITH LYDIA FENET

Take a deeper dive with Lydia in this interactive session on how to engage, motivate and inspire donors to rally support behind a cause.

Lydia Fenet, ambassador, Christie's Auction House; auctioneer & author

2. FUNDING FOR THE PLANET: FOCUS ON THE ENVIRONMENT

Explore targeted strategies to improve the environment and preserve nature.

Amanda Paulson, special projects officer, The Bobolink Foundation

Michelle Carr, state director, The Nature Conservancy in Illinois

Moderated by **Bruce Boyd**, principal, Arabella Advisors

3. EFFECTING CHANGE WITH MEDICAL RESEARCH FUNDING

Medical research is a complex space – our experienced panelists explain how to find opportunities, optimize funding and advocate for meaningful research.

Rob Butcher, president & CEO, Swim Across America

Dr. Luis Alberto Diaz, medical oncologist, Memorial Sloan Kettering Cancer Center

Kim Meredith, CEO, San Francisco General Hospital Foundation

Moderated by **Felipe Medina**, private wealth advisor, Goldman Sachs

4. PHILANTHROPY 101: STARTING, STRUCTURING AND OPTIMIZING YOUR EFFORTS

This workshop style session for beginner philanthropists highlights the Stanford PACS Guide to Effective Philanthropy, and how it can be useful for those seeking to become impactful and effective philanthropists.

Priya Shanker, executive director, Stanford Center on Philanthropy & Civil Society
Kathy Kwan, advisory board member, Stanford Center on Philanthropy & Civil Society
Introduced by **Karey Dye**, president of the Goldman Sachs Philanthropy Fund & Ayco Charitable Fund, Goldman Sachs

1:15 – 1:35 PM

TRANSITION TO SECOND BREAKOUT SESSIONS

1:35 – 2:20 PM

SECOND BREAKOUT SESSIONS

1. ADVANCING EQUITY AND INCLUSIVE GROWTH

Discover tips and tools for advancing equity in any philanthropic setting.

Dr. Monique Couvson, president & CEO, Grantmakers for Girls of Color
Jessica Pliska, founder, The Opportunity Network
Jeff Kutash, co-founder & managing partner, Boldly Go Philanthropy
Moderated by **Nicole Pullen Ross**, region head of New York Private Wealth Management & head of Sports & Entertainment Solutions, Goldman Sachs

2. FUNDING FOR BEHAVIORAL HEALTH: PRIORITIZING YOUTH

Join a discussion on the current state of early life behavioral health and hear innovative approaches to tackling the crisis.

Dr. Pamela Hurst-Della Pietra, founder, president emerita, Director of Strategic Projects & Chair of the Boards Children & Screens
Mark Verdi, co-founder, The Goodness Web
Moderated by **Jeffrey Paine**, private wealth advisor, Goldman Sachs

3. BEYOND GRANTS: SUPPORTING YOUR MISSION THROUGH ADVOCACY AND INVESTMENT CAPITAL

A conversation about leveraging your philanthropic programs and investment portfolio to maximize your purpose.

Wendy Abrams, founder & CEO, Eleven Eleven Foundation

Carra Cote-Ackah, chair, Surdna Foundation; head of Philanthropy Engagement & Legacy Planning, Goldman Sachs

Moderated by **Abigail Pohlman**, global head of Private Wealth Management Sustainable Solutions Group, Goldman Sachs

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2:20 – 2:40 PM

COFFEE & NETWORKING BREAK

Auditorium Foyer, 200 West Street, New York, NY

2:40 – 3:20 PM

FIRESIDE CHAT WITH CONNIE AND STEVE BALLMER

Co-founders of Ballmer Group Philanthropy, the Ballmers share their commitment to opportunity for all and their approach to funding organizations focused on economic mobility for kids and families in the United States.

Connie Ballmer, co-founder, Ballmer Group

Steve Ballmer, co-founder, Ballmer Group

Moderated by **Tucker York**, global co-head of Consumer & Wealth Management, Goldman Sachs

3:20 – 3:50 PM

RECOGNIZING VALOR: BUILDING AND SUPPORTING THE LEGACY OF AMERICA'S HEROES

Learn more about the National Medal of Honor Museum, which will celebrate our nations bravest heroes and preserve the legacies of the exceptional few who have been awarded the most prestigious military decoration.

Charlotte Jones, owner, executive vice president & chief brand officer, Dallas Cowboys Football Club

Colonel Jack Jacobs, Medal of Honor Recipient

Moderated by **Dina Powell**, global head of Sustainability & Inclusive Growth & global head of Sovereign Business, Goldman Sachs

3:50 – 4:10 PM

TURNING YOUR INSPIRATION INTO ACTION – YOU ARE THE ANSWER

A conversation to inspire and invigorate each of us to effect change in the world.

Ivy McGregor, executive director, BeyGOOD

Moderated by **Nicole Pullen Ross**, region head of New York Private Wealth Management & head of Sports & Entertainment Solutions, Goldman Sachs

4:10 – 4:55 PM

USING YOUR PLATFORM TO FURTHER PHILANTHROPY

Join the Rogens and Dr. Mosconi as they discuss their joint efforts to advocate for brain health research and educate people about preventing Alzheimer's disease.

Lauren Miller Rogen, co-founder, HFC

Seth Rogen, co-founder, HFC

Dr. Lisa Mosconi, associate professor, Neuroscience in Neurology & Radiology, Weill Cornell Medicine

Moderated by **John Mallory**, co-head of Global Private Wealth Management, Goldman Sachs

4:55 – 5:00 PM

CLOSING REMARKS

John Mallory, co-head of Global Private Wealth Management, Goldman Sachs

5:00 – 6:00 PM

CLOSING COCKTAIL RECEPTION

Auditorium Foyer, 200 West Street, New York, NY

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