Tuck

Mark Anderegg, Adjunct Professor of Business Administration, Tuck School of Business

Co-founder, Newbury Franklin

Before succumbing to his entrepreneurial spirits, Mark began his career as an investment banker with Goldman Sachs, first in New York and later in Chicago, and subsequently worked as a private equity investor.

With the support of his private equity colleagues, Mark raised a small amount of capital with the intent to acquire and lead an education services company. This undertaking led to the 2012 acquisition of Little Sprouts, a Boston-based provider of childcare services. Mark served as CEO for 6 years and expanded the company to become the largest independent childcare company in New England, operating several different brands in 4 states.

Recognizing his aspiration to build a business with a much longer-term orientation, Mark stepped down as CEO to found Newbury Franklin with his friend and colleague, Kevin Brady.

Mark received his B.A. in Economics, magna cum laude, from Vanderbilt University and his MBA from the Kellogg School of Management at Northwestern University. He is Adjunct Professor at the Tuck School of Business at Dartmouth College, where he teaches on the subject of Entrepreneurship Through Acquisition and serves as Senior Advisor in the Center for Private Equity and Venture Capital. Mark lives with his wife and their three children in Newburyport, MA.

Chad Bounds, Vice President at HarbourVest

Chad Bounds is a Vice President at HarbourVest, where he focuses on analyzing, structuring, and monitoring secondary private equity opportunities, including traditional and complex transactions.

Chad joined the Firm from Raymond James & Associates, where he was most recently an investment banking associate in the Technology & Services Group focusing on a broad range of M&A and strategic advisory transactions across various industries.

Chad received a BBA in Finance from the University of Mississippi in 2013 and an MS in Finance from the Vanderbilt University Owen Graduate School of Management in 2014.

Francisca Carpentier, MBA Candidate, Tuck School of Business

Jim Davidson, Co-Founder, Silver Lake Partners

Jim Davidson has been an active technology industry investor, advisor, and entrepreneur for more than 35 years. He is a co-founder and former long-time Managing Partner of Silver Lake, one of the world's largest and most successful investors in global technology industries. Jim is currently a co-founder and Managing Partner of Kandle, a tech-enabled real estate investment platform. He is also a co-founder and Managing Partner of Bridger Holdings, a multi-family investment office.

Jim has been active in a number of non-profit organizations, including the U.S. Olympic and Paralympic Foundation and the Board of the Basketball Hall of Fame.

Holland Davis T'18, Vice President, The HarbourVest Boston Team

Holland Davis joined HarbourVest in 2018 and focuses on sourcing, analyzing, and executing a full range of real assets investments.

Holland joined the Firm from Cambridge Associates, where he spent four years as an associate investment director conducting due diligence on private equity real estate, natural resources, energy, and most recently co-investment opportunities for clients.

Holland received a BA (magna cum laude) in Economics and Government from St. Lawrence University in 2011 and an MBA from Tuck School of Business at Dartmouth College in 2018.

Tuck

Mark Egan, Founder and Managing Partner, Marion Equity Partners

Mark Egan is a founder and Managing Partner at Marion Equity Partners, a Boston based investment firm. Prior to Marion, Mark focused on growth equity investments in the technology, healthcare, media, and business services industries at Polaris Venture Partners. Before Polaris, Mark began his career at Alta Communications where he executed investments in the media and telecommunications sectors. Mark also has previous experience with Comcast Corporation in business development. Mark received a degree in Finance from Fairfield University and an MBA from The Wharton School at the University of Pennsylvania.

Matt Fates T’02, Partner, Innospark Ventures

Matt has worked with early-stage technology driven companies since 1996, from formation stage all the way through IPO and beyond through different roles. As a venture investor and angel, either through his firm or individually, Matt has invested in over 100 companies. Today, Matt is a Partner at Innospark Ventures in Boston, focused on early-stage AI/ML investments. Prior to Innospark, Matt was a Partner at Ascent Venture Partners (2002 – 2021) where he focused on investments in data analytics, data-driven business SaaS and cybersecurity. At Norwest Venture Partners (1998 – 2000), Matt worked with networking and enterprise technology companies. Before Norwest, Matt helped execute both IPO and M&A transactions at Alex Brown & Sons (1996 – 1998), a leading technology investment bank in the 1990s.

Matt was a double major in computer science and economics at Yale University where he was also captain of the rugby team. He later earned an MBA from the Tuck School of Business at Dartmouth (Tuck Scholar).

Matt currently serves as a board member for Antiverse, ConnectBase, Dyania Health, ODAIA Intelligence, Promoboxx, Zeta Surgical and charter school KIPP Massachusetts. Prior investments include Broadband Access Systems (acquired by ADC Telecom), Gold Wire Technology (acquired by Intelliden), COSpace (acquired by InterNAP), Cymfony (acquired by TNS), Interactive Supercomputing (acquired by Microsoft), Fidelis Security (acquired by General Dynamics), StrikeIron (acquired by Informatica) and PerspecSys (acquired by Blue Coat Systems).

James Feuille D'79, Venture Partner, Crosslink Capital, Adjunct Faculty and Faculty Advisor to the Center for Private Equity and Venture Capital, Tuck School of Business

Jim joined Crosslink in 2002, bringing 20 years of technology investment banking, M&A, capital markets and management experience to the firm. At Crosslink, Jim has led investments in five companies which grew to achieve multi-billion market cap exits Omniture (NASDAQ: OMTR, IPO 2006, acquired by Adobe 2009 for $1.8B), Ancestry.com (NASDAQ: ACOM, IPO 2009, acquired by Permira Advisors 2012 for $1.6B), Pandora (NYSE: P, IPO 2011, average market cap at Crosslink's venture fund exit of $5.5B), Coupa (NASDAQ: COUP, IPO 2016, average market cap at Crosslink's venture fund exit of $5.3B), and Personal Capital (acquired by Empower Financial 2020 for $1B). Jim's current lead investments include an additional two companies that have grown to billion-dollar plus valuations: Chime (most recent financing in July 2021 at a $25.5B valuation) and Reltio (most recent financing in October 2021 at a $1.7B valuation).

Jim's experience prior to Crosslink included Global Head of Technology Investment Banking at UBS, where he built a powerful global technology investment banking practice from scratch; President and Chief Operating Officer at Volpe Brown Whelan & Company, where he ran all aspects of the firm's investment banking and brokerage operations and led the firm to record growth in revenue and market share prior to its acquisition by Prudential Securities; and Head of Technology Investment Banking at Robertson Stephens & Company, where he built the technology investment banking team into a leadership position in the industry.

Jim also serves as Adjunct Faculty and Faculty Advisor to the Center for Private Equity and Venture Capital at the Tuck School of Business at Dartmouth.

Tuck

Brian Fleming D’98 T08, Managing Director, Investor Group Services (IGS)

Brian Fleming is a Managing Director at Investor Group Services (IGS). Brian focuses on the development of new client relationships and the management of due diligence and strategy engagements for private equity and corporate clients. He has extensive experience helping clients across a range of industries evaluate acquisitions and develop strategic plans.

Prior to attending business school and joining IGS, Brian worked as an Associate for Boston Ventures, a private equity firm that invests in middle-market companies in the media, business services, and communications sectors. Brian also has worked as an Analyst in the General Industry investment banking group at Bear Stearns and in microfinance at Accion.

Brian holds an M.B.A. from the Tuck School of Business at Dartmouth and an A.B. in Economics, cum laude, from Dartmouth College. Brian lives in Charlestown, MA, with his wife and three children and spends much of his time away from work coaching youth hockey and soccer.

Tuck

Ryan Ganong 2nd degree connection D'13 T'20, Vice President at ArcLight Capital Partners

Mr. Ganong joined ArcLight in 2020. Prior to joining ArcLight, Mr. Ganong was an Analyst in the High Yield Debt group at Fidelity Investments, where he evaluated investment opportunities across the capital structure, primarily focused on the upstream sector of the energy industry. Mr. Ganong earned a Bachelor of Arts in History from Dartmouth College and a Master of Business Administration from the Tuck School of Business at Dartmouth College, where he was a Revers Center for Energy Fellow.

Tuck

Joseph J. Gerakos D’90, Senior Associate Dean for Innovation and Growth; Professor of Business Administration; Area Chair, Accounting, Tuck School of Business

Joseph Gerakos studies markets for financial services and is currently conducting research on competition in the audit market and the performance of the asset management industry. He teaches Managerial Accounting.

David Goldenheim T’11, Managing Director, Audax

David is a Managing Director for Audax Private Equity, based in Boston. Prior to joining Audax in 2007, David worked at L.E.K. Consulting.

David received an M.B.A. from the Tuck School of Business at Dartmouth and an A.B. from Harvard College.

Tuck

Daniel Gottlieb T'99, Associate Director, Broadview Ventures

Daniel shares responsibility for the day-to-day investment activities at Broadview Ventures, including identification and screening of new opportunities, due diligence, negotiation of deal structure, and portfolio company board involvement.

Daniel has 20 years of experience at medical device and biotechnology companies in corporate and business development, corporate venture capital, marketing, and strategy. Previously, Daniel was a member of the leadership team at Proteon Therapeutics, most recently as Vice President, Corporate Development. Daniel led Proteon's business development, strategic marketing, and corporate development activities as the company progressed from a Series A startup through multiple private financings, a successful IPO, and completion of Phase 3 clinical studies. Prior to Proteon, Daniel was a strategic marketing manager in Abbott Vascular's endovascular business unit, where he led the team developing next generation devices for peripheral artery disease. Prior to that, Daniel was at Guidant Corporation, primarily as a member of Guidant Compass, the company's corporate venture capital, business development, and corporate strategy group. As a member of the Compass team, Daniel led investments in early-stage cardiovascular device companies, focusing on coronary and peripheral revascularization, cardiac rhythm management, heart failure monitoring, and cardiac surgery.

Daniel holds a BA from the University of Pennsylvania and an MBA from the Tuck School of Business at Dartmouth College. Daniel currently serves on the boards of XII Medical and Cardiosense and holds board observer roles at CroíValve and Nyra Medical. Previously, Daniel held board observer roles at Nido Surgical (acquired) and Puzzle Medical, and as a member of Guidant Compass at CardioMEMS (acquired) and Neovasc (acquired).

Ken Graham D'85 T'90 Founder and Chairman Inverness Graham

Ken Graham is the Founder and Chairman of Inverness Graham, an operationally focused, lower middle market private investment firm that has raised over $1 Billion since inception. Ken oversees all activities of the firm, including investment sourcing, evaluation, monitoring and divestiture.

Prior to forming Inverness Graham, Ken served as Senior Vice President of Graham Packaging Company, heading Latin American Operations, Global Business Development, and the Tetra Pak/Graham Global Alliance and as Executive Chairman of Graham Engineering Corporation. Earlier in his career, Ken served as Director of Business Development for Superconducting Core Technologies, as a manager for turnaround consultants Mackenzie, Hovey and Associates, and was a co-founder of media technology and services firm Media Stream.

Ken currently serves on the National Advisory Board for Technology Transfer at the University of Michigan and as a trustee of Thomas Jefferson University. He is Vice Chairman of the Burke Mountain Academy Board of Trustees and is active in numerous other professional organizations in private equity and regional business.

Ken earned his B.A. from Dartmouth College and his MBA from the Amos Tuck School of Business, Dartmouth College."

Kartik Gulati T'23, MBA Candidate, Tuck School of Business

Kartik started his career with Deloitte Consulting where he helped clients in life sciences identify M&A targets. He then moved on to ReNew Power, India's largest clean energy developer, where he helped his firm invest in emerging cleantech (green hydrogen, energy storage etc.) and expand into new geographies. At Tuck, Kartik is the CFO of TuckStuff, a student-run retail business, the co-chair of the South Asian Business Association, and a PEVC fellow at the Center for Private Equity & Venture Capital. After Tuck, Kartik will be joining Bain and Company as a consultant in their Boston office.

Tuck

Palmer Higgins, Founding Partner, Chenmark

Palmer Higgins, along with his brother James Higgins and James' wife Trish Higgins, make up the family behind Portland, Maine-based Chenmark, as its three founding partners. Before the three joined forces in 2015, they followed similar trajectories in finance until they found themselves drawn to the goal of being an owner-operator of their own small business.

With their first acquisition of a Maine-based landscaping company in 2015, the three of them, and their growing team, have continued to work with retiring owners and current entrepreneurs to provide liquidity, preserve legacies, and position companies for long-term success. In 2019, Palmer stepped in to run Mainely Grass as CEO, where he and his team transformed the business to reach the level needed to serve 10,000+ customers across three states. Most recently, Palmer has become CEO of Seabreeze Property Services, Chenmark's first acquisition.

To date, Chenmark has completed 30+ acquisitions in the landscaping, pest control, manufacturing, and tourism industries.

Tuck

Jen Holland T'12, Partner, Bain & Company

Jen Holland is a leader in Bain & Company's Private Equity practice, with deep expertise in Retail and Consumer Products. Jen holds significant experience in serving private equity sponsors on diligence and post-acquisition strategy projects. She has led well over 150 projects in a broad range of consumer sectors, including food and beverage, beauty and personal care, apparel, home goods, restaurants, nutrition, and wellness, D2C, consumer tech, and other specialty sectors.

Her work spans brands, retailers, co-manufacturers, business enablement providers, and information services across small to large-scale platforms.

She has also worked on a range of issues for her corporate clients, including growth strategy, digital transformation, M&A capability-building, and brand strategy. Jen holds an MBA from Tuck School of Business and a B.A. from Dartmouth College.

Steve Houston, Managing Director, Head of Investment Products

Steve is a Managing Director and Head of Investment Products at iCapital, and a member of the Management Committee and Operating Committee. He is responsible for the Alternative Investments and Structured Investments origination and management functions, the firm's Research & Education groups and the Sales & Distribution teams. Prior to joining iCapital, Steve was a founding partner of m+ Funds, a 40-act fund company. Previously, he was Managing Director, Wealth and Investment Management at Stifel, Nicolaus & Co., where he led the alternative investments business. Prior roles include Head of Americas Wealth Management at Barclays Bank and Co-head of both Private Client Structured Investments and Alternative Investments at Merrill Lynch. Steve earned a BA in Economics from the University of Texas and received an MBA from Columbia University.

Tuck

Chloe Kempf T'23, MBA Candidate, Tuck School of Business

Chloe is a second-year student at the Tuck School of Business. Prior to Tuck she worked as a tax accountant at PricewaterhouseCoopers in the Mergers and Acquisitions practice serving private equity firms and corporations on tax due diligence and tax structuring projects. She interned this past summer at McKinsey in the Dallas office as a generalist and will be returning to McKinsey after graduation. She plans to use the skills she develops as a consultant along with her finance & accounting background to work with early stage & venture backed companies either by working at a venture capital firm or an early stage start up. Chloe is a CPA and holds a Master of Business Taxation from the University of Southern California and a B.A. from Brown University.

Tuck

Mark Koulogeorge, Managing General Partner, MK Capital

Mark Koulogeorge is Managing General Partner of MK Capital where he leads the firm's software investment practice and has over twenty five years of venture capital experience. Mark's functional expertise is in developing sales, marketing, and channel strategies to achieve market leadership and in the building of high-performance executive teams. Mark has served on the board of directors of over 25 technology companies which have generated over $750 million of realized gains for his investors. He has been the lead or first institutional investor in several significant technology companies including: LLamasoft (sold to Coupa Software for $1.5 billion), Tradex Technologies (sold to Ariba for $1.8 billion), Aprimo (sold to Teradata for $540 million), Initiate Systems (sold to IBM for $424 million), and The Cobalt Group (sold to ADP for $400 million). Prior to founding MK Capital, Mark was a managing director at First Analysis and served as a general partner of The Productivity Funds and The Environmental Venture Funds. Prior to his career in venture capital, Mr. Koulogeorge was an Executive Officer of Eagle Industries, a $1.5 billion diversified manufacturer, controlled by Chicago entrepreneur Sam Zell and earlier was a consultant with Booz Allen. He earned a B.A. from Dartmouth College and an M.B.A. from Stanford University.

Tuck

Andrew Lackner D'97 TH'99, Managing Director, Energy Innovation Capital

I have 20 years of experience in venture capital, new venture incubation, product management, and corporate innovation. I am currently working as a Managing Director at Energy Innovation Capital, a premier energy technology VC firm with $230+ million under management and a current portfolio of 26 startups.

Previously I worked with Accenture Bloom, the corporate innovation practice of Accenture. Bloom helps Fortune 500 companies and investment funds launch and scale innovation programs and new ventures targeting the primary digital disruptions impacting their industries.

Previously, I helped establish the VC team focused on energy within GE Capital Energy Financial Services (GE EFS), and the corporate innovation program GE Ventures. At GE I also led a $100M investment program of the ecomagination Innovation Challenge, GE's first open innovation program focused on the smart grid and smart buildings. I also helped manage Energy Technology Ventures, a $300M VC investment vehicle of GE, ConocoPhillips, and NRG. GE EFS was named Investor of the Year in 2011 by the CleanTech Group, and the most active global corporate partner in '08 through '13.

At GE Ventures, I was a senior investment professional and head of operations for the Intelligent Environments and Energy VC team and also helped develop the first new energy business incubated within GE Ventures, Current by GE. I managed innovation programs with many teams from GE Capital (EFS, GE Equity), GE Corporate (GE Ventures, Global Research Center, ecomagination), and GE business units (Power, Renewable Energy, Grid Solutions, Appliances, Lighting, Oil and Gas, Measurement and Controls, Water, and Transportation). GE Ventures was named Unit of the Year in 2016 by Global Corporate Venturing.

Prior to GE, I worked as an associate at Columbia Capital, a communications, media, and enterprise IT focused VC firm in the DC Metro area with $3.7B of assets under management and over 175 portfolio companies. I also worked as a strategy consultant for venture-backed companies and CVC programs at Fletcher Spaght, a strategy consulting and VC firm in Boston. And as a product manager for a $60MM per year information alerting product of MicroStrategy, a public business intelligence enterprise software company. In my career I have closed over 100 VC financings across a broad range of technologies and industries.

Todd Liker T'00, Managing Director and Co-Portfolio Manager, Oaktree Capital Management

Mr. Liker is a managing director and co-portfolio manager of Oaktree's Real Estate Opportunities strategy and leads the Real Estate team in New York. He is a member of the real estate leadership team and serves on both the real estate investment committee and the real estate credit committee. Mr. Liker is involved in the capital raising, management and investment of Oaktree's real estate opportunities strategy and predominantly focuses on investment opportunities in the eastern half of the U.S. as well as corporate real estate-related platforms and companies nationally. Prior to joining Oaktree in 2008, Mr. Liker was an executive director with J.P. Morgan Securities' Real Estate, Lodging & Gaming Investment Banking group in New York and London. Prior to joining J.P. Morgan, he spent four years at ABN AMRO in Chicago and Singapore. Mr. Liker received a B.S.B.A. degree from the John M. Olin School of Business at Washington University and an M.B.A. from the Tuck School of Business at Dartmouth. Mr. Liker is currently a member of the Executive Board of Florida State University's Real Estate Center and was formerly a member of the M.B.A. Advisory Council at the Tuck School of Business and of the Advisory Board for the University of Miami's Master of Real Estate and Development + Urbanism program.

Cara LoPiano T’23, MBA Candidate, Tuck School of Business

Blake Macleod, Partner at Archipelago Capital Partners

Blake Macleod is a successful entrepreneur, investor, and Partner at Archipelago Capital Partners. As an entrepreneur who struggled for over a decade before finding success, Blake is passionate about helping other entrepreneurs in their entrepreneurial journey. He founded, operated, and eventually sold Waves Gear and Kawartha Outdoor, two direct-to-consumer e-commerce brands. Blake is on the board of ModuleMD and Subatomic Digital. Based in Boston, he holds a BA in Economics from DePauw University and an MBA from Babson FW Olin Graduate School of Business.

Devin Mathews T'00, Partner, ParkerGale Capital

Devin has twenty years of experience investing in technology companies and helping management teams build their companies. Prior to founding ParkerGale, Devin was a Managing Partner and a member of the investment committee at Chicago Growth Partners where he ran their technology group. He also spent five years at Baird Venture Partners where he was the Managing Partner and chair of the investment committee. Early in his career, Devin worked at Great Hill Partners and William Blair Capital Partners. He studied Art History at SUNY Binghamton and received his MBA from the Tuck School of Business at Dartmouth. Devin supports Chicago's visual arts community as a Board member of threewalls.

Tuck

Daniel Nulton D'15 T'23, MBA Candidate, Tuck School of Business

Dan was most recently a member of the Boston University Investment Office, where he performed manager due diligence, private portfolio modeling, and performance attribution in addition to various other allocator functions. Prior to BU, he spent three years at Cambridge Associates as part of the firm's Pensions team. Dan graduated Dartmouth College in 2015 with a major in economics and a minor in neuroscience.

Jack O'Donnell, MBA Candidate at Tuck School of Business at Dartmouth

Tuck

Leah O'Donnell T'03, Head of Partnerships and Corporate Development, Seae Ventures

Leah brings over 20 years of both consulting and operations experience working across a range of healthcare and consumer-focused businesses.

- Business Development
- Venture
- Strategy

Nii Amaah Ofosu-Amaah, Managing Director, Business Development & Investor Relations, Berkshire Partners

Nii Amaah Ofosu-Amaah is a Managing Director at Berkshire Partners. His cross-functional role spans across business development and investor relations and he is also currently involved with Berkshire portfolio company EP Wealth Advisors. Examples of prior Berkshire portfolio company involvement include AmSafe, Bare Escentuals, Carter's, Telx, and TransDigm. Nii Amaah originally joined Berkshire in 2006 as an Associate on the private equity team, and then returned to the firm in 2010 after graduating from business school. Prior to joining Berkshire, Nii Amaah was an Analyst in the investment banking division at Goldman, Sachs. He received an A.B. from Harvard College and an M.B.A. from Harvard Business School.

Peter Pritchard T'23, MBA Candidate, Tuck School of Business

Perrin Quarshie, Founder & CEO, RealBlocks

Perrin is the Founder & CEO of RealBlocks, as online platform that provides access and liquidity for alternative investments. RealBlocks democratizes access by lowering the required minimum investment amount, providing international access, and allowing or investor liquidity via secondary trading. Perrin began his career as a civil engineer at NAC International, where he focused on real estate development and finance of energy infrastructure projects.

Tuck

Lena Rice T’23, MBA Candidate, Tuck School of Business

Tuck

Laura Rippy D'89, Managing Partner, Green D Ventures at Alumni Ventures

Laura brings operational perspective as a CEO, Chairman, and executive in technology startups in addition to investing experience. As Managing Partner at Ripplecreek Partners' technology practice and General Partner at FA Technology Ventures, she worked various tech sectors: mobile, consumer, internet, SaaS, cloud-based, marketing, and enterprise software across many economic cycles. She also served as CEO at Handango, creating the first marketplace of mobile apps. At Microsoft, she co-founded two businesses as an intra-preneur in an elite swat team spun out of Bill Gates' office. Laura holds an MBA from Harvard Business School and AB in Government from Dartmouth ('89).

Tuck

John Rudge T'99, Partner, Lexington Partners

John Rudge is a Partner of Lexington Partners primarily engaged in the origination and evaluation of secondary purchases of private equity and alternative investments. Prior to joining Lexington in 2001, Mr. Rudge was an associate in investment banking at Morgan Stanley.

Mr. Rudge graduated from Middlebury College with a BA in American Civilizations and from the Tuck School of Business at Dartmouth with an MBA."

Tuck

Michael Sanduski T'23, MBA Candidate, Tuck School of Business

Entrepreneurial leader passionate about the built environment and its ability to meaningfully impact people, places, and organizations. I am pursuing a dual M.B.A./M.P.A. at the Tuck School of Business at Dartmouth and Kennedy School of Government at Harvard with the aim of transitioning to a career in real estate development.

Martin Skarra T'19

Martin graduated from Tuck in 2019 and moved to Seattle to do a self-funded search for a small business to buy. After 18 months of searching, he ended up acquiring what is now Seattle Window Cleaners, a small residential window cleaning business. In October 2022, he acquired a second company, a local Molly Maid franchise providing residential housekeeping services. Both companies were acquired using a combination of (meager) personal savings and SBA 7(a) loans. Combined, the businesses have thirty employees, did $2.5 million in revenue in 2022, and generated $500.000 in EBITDA. Outside of work, Martin enjoys the great outdoors with his wife (and largest investor), Annie, and their two daughters Sofie and Astrid.

James Socas, Managing Director, Blackstone Tactical Opportunities - New York

James Socas is a Managing Director in Blackstone's Tactical Opportunities Group. Mr. Socas has been involved with the firm's investments in VectraAI, FireEye, Snowflake, Wiz, Diligent, Episerver, and Titus.

Before joining Blackstone, Mr. Socas was co-managing partner of Updata, a boutique growth equity firm focused on the software industry. He earlier served as a Managing Director at Credit Suisse First Boston and Donaldson, Lufkin & Jenrette, providing mergers & acquisitions and capital raising advice to companies in the global software industry. He later joined the senior management team of one of his investment banking clients, Symantec, as Head of Corporate Development, leading its strategic acquisitions, alliances and corporate venture investing.

He has served on the board of managers of the University of Virginia Alumni Association, the board of trustees of the Potomac School, the Board of Corrections for the Commonwealth of Virginia, and is a member of the New America Alliance. He is an honors graduate of the University of Virginia and a graduate of Harvard Business School.

Tuck

Scott Stuart, Co-Founder & Partner

Scott Stuart is a Founding Partner of Sageview Capital. He is responsible for all aspects of Sageview's business and sits on the firm's Investment Committee and the Portfolio Committee.

Prior to founding Sageview Capital, Scott was at Kohlberg Kravis Roberts & Co (KKR) for 19 years. He joined KKR in 1986 in New York, became a partner in 1994, and he was responsible for the utilities and consumer products industry groups. He also served on KKR's Investment Committee from its inception in 2000 until his departure in 2005. Before joining KKR, Scott worked at Lehman Brothers Kuhn Loeb, Inc. in the mergers and acquisitions group.

Scott graduated from Dartmouth College with an A.B. in English. He received an M.B.A. from the Graduate School of Business, Stanford University.

Scott is the Chair of Memorial Sloan Kettering's Board of Trustees and Governing Trustees. Additionally, in 2021, Scott and his wife Lisa launched the Lisa & Scott Stuart Center for Adolescent & Young Adult Cancers at MSK with the goal of revolutionizing cancer treatment for people ages 15 to 39 and to meet their very specific and often unmet needs.

Tuck

Dune Thorne, CWS®, CTFA, MBA
Partner, Brown Advisory; Founder, Invest in Girls

Dune Thorne is a Partner at Brown Advisory where she serves on the Executive Committee & is the Chief Strategy officer for the Private Client and Endowment & Foundation Business. Brown Advisory is an investment advisory firm that manages over $140B for institutions and families from fourteen offices globally. Her work focuses on sustainable and impact investing, diversity and inclusion and the intersection between investing and philanthropy.

In 2010 she founded Invest in Girls, a non-profit focused on financial literacy for under-represented high-school girls that works with over 5,000 girls across the country and is continuing to grow and expand through its combination with The Council for Economic Education.

Dune has been honored with numerous awards, including Top 50 Women Leaders of Massachusetts, EV Kids Youth Champion Award, World Economic Forum' Young Global Leader, Advisor One's Top 50 Women in Wealth, and Boston Business Journal's Emerging Leader. A frequent speaker, radio and television interviewee, Dune authored her own TEDx talk, "Jump to the New S Curve: Unleash the Power of Inclusion" and been quoted in financial journals as well as The New York Times, Wall Street Journal and Forbes.com.

Dune attended Harvard Business School where she received an MBA and was the recipient of a Summer Social Enterprise Fellowship in 2003. She holds a BA from Dartmouth College in Economics where she was captain of the nationally ranked Women's Lacrosse team and received All-Ivy Academic Honors. She is a graduate of the Boston Center for Community & Justice Lead Boston Program, the Global Leadership and Public Policy for the 21st Century at the Harvard Kennedy School and the Leadership in Energy Innovation and Environmental Consideration at Princeton University.

Ms. Thorne has three children and her personal passions are the arts, running, skiing, traveling, being outside and active with her family and doing everything she can to help build a more equitable and just society.

Jeff Zhou T'14, Vice President, Grain Management

Mr. Zhou is a Vice President on the Investment Team, responsible for deal origination and investment underwriting.

Prior to Grain, Mr. Zhou was a Vice President in the Media and Communications group at Morgan Stanley. Previously, he worked in corporate development and strategic planning at iHeartMedia (formerly Clear Channel Communications).

Mr. Zhou holds an M.B.A. from the Amos Tuck School of Business at Dartmouth College, an M.S. in Finance from Texas A&M University, and a B.S. in Computer Science from Fudan University.