

Speaker Biographies

Adam Challis, Trustee, World Habitat

World Habitat's mission is to make housing a basic right for everyone. World Habitat finds, supports, shares and celebrates those ideas and actions that have an overwhelmingly positive impact on individuals, families and communities. In his day job, Adam is an Executive Director of Research and Strategy at JLL, a global provider of real estate services. Adam's experience includes working with both public and private sector clients on residential development and investment opportunities.

Ajay Johal, Investment Manager, Ruffer LLP

A member of the Chartered Institute of Securities & Investment, Ajay joined Barclays Wealth before moving to Ruffer in March 2014. He spent time in Ruffer's Hong Kong office as an equity analyst before returning in 2019 to the Charities team in London. He is a member of the Chartered Institute of Securities & Investment and is co-manager of the Charity Assets Trust.

Alex Geere, Senior Investment Consultant, Mercer

Alex works within Mercer's UK Wealth business and is lead investment consultant to a number of endowments, foundations and UK defined benefit pension schemes, advising clients across a variety of issues encompassing investment strategy, portfolio construction and manager selection. Based in London, Alex joined Mercer in 2012 and has over 10 years' experience as an investment consultant. Alex is a member of Mercer's European Dynamic Asset Allocation Committee, which is responsible for formulating and disseminating Mercer's short-medium term macroeconomic and asset class views. Alex also co-chairs Mercer's Endowment & Foundation Segment Investment Committee. Alex has a first-class degree in economics from the University of Exeter, holds the Investment Management Certificate and is a CFA charter holder.

Carol Mack OBE, Chief Executive, Association of Charitable Foundations

Carol was appointed Chief Executive of ACF in 2016, having previously served as its Deputy Chief Executive. Prior to ACF, Carol worked advising charities on governance and charity law, as well as national policy formulation at the Charity Commission for England & Wales. She also has experience in grass-roots charities and the commercial sector, having begun her career in the international trading and refining division of an oil company. She was previously a founding trustee of the National Emergencies Trust and Vice Chair of Tree Aid. Currently she is Chair of the Wales Funders Forum and a board member of Philea, the European Philanthropy Association.

Clara Opoku, Assistant Portfolio Manager, Cazenove Capital

Clara joined Cazenove Capital in 2023, as Assistant Portfolio Manager. She holds seven years industry experience having worked as a management consultant. In her new role, she will provide support to charity clients, Portfolio Directors and Portfolio Managers.

Cristina Ferreira, Investment Consultant, Mercer

Cristina is an Investment Consultant in Mercer's dedicated Endowments & Foundations team. She joined Mercer in 2016 with a BSc in Economics and an MSc in Finance from Lisbon's School of Economics & Management. Cristina is a lead support for a number of endowment clients ranging in size from around £20m in assets to over £500m. Over the last few years, Cristina has worked on a

range of projects including manager selections and restructures, ESG reviews, strategic reviews and ongoing performance monitoring.

Diana Sutton, Director, The Bell Foundation

Diana joined The Bell Foundation in 2011 as its founding Director. Over the last decade Diana has had the strategic vision to develop and grow the Foundation. This work has included commissioning and/or contributing to research (from leading universities, think tanks and The Bell Foundation) and programmes to establish an evidence base, and using that to drive change in practice, policy and systems for English as a second or additional language (ESL) speakers.

Elizabeth Jones, Partner, Farrer & Co

Elizabeth acts for charities of every type and advises on the full spectrum of charity law issues. She is recognised as a leading adviser in the sector and is currently the Chair of the Charity Law Association. Elizabeth advises on the full range of legal issues that affect charities: from establishing new charities, through to large merger and restructuring projects, commercial and trading arrangements, fundraising, documenting major gifts and governance and constitutional issues. She has wide ranging experience acting for charities of all sizes, including household and smaller organisations.

Gail Cunningham, Consultant

Gail is an independent consultant, working on charity investment governance and with foundations and networks on responsible and impact investing. Gail was previously head of investment learning at the Association of Charitable Foundations, and country-lead for the Macquarie Group Foundation in the UK and Canada. Gail is a trustee of the Essex Community Foundation.

Gemma Cartwright, Head of investment practice and partnership, Association of Charitable Foundations

Gemma leads ACF's investment programme, including the Finance, Investment and Resource Management network for the finance directors of larger foundations and the Social Impact Investors Group. Gemma previously led the relationship with corporate partners for Fairtrade Foundation and Amnesty International. Gemma is a trustee of the Essex Community Foundation.

Heather Lamont, Director Client Investments, CCLA

Heather has worked in charity finance and management since qualifying as a chartered accountant in 1992. Her other qualifications included the Chartered Institute for Securities and Investment (CISI) Diploma, an MBA from Manchester Business School and a Diploma in Charity Accounting from the ICAEW. She joined CCLA in 2008, from the charities team at HSBC Global Asset Management.

Karen Atkinson, City Bridge Foundation & Charities Finance Director , City Bridge Foundation

Karen leads on financial performance management for Bridge House Estates, with overall responsibility for the provision of successful financial leadership across the charity's operating budget and asset portfolio, alongside the provision of strategic financial advice.

Kate Rogers, Head of Sustainability, Cazenove Charities

Kate specialises in investment on behalf of charities, endowments and foundations and has over 20 years of experience. She is a CFA charter holder and won a Women in Investment Award for her work with the Charity Commission and FCA creating a new charity investment vehicle. Kate researched and co-authored a series of publications on charity investment best practice including 'For Good and Not for Keeps', which examines sustainable expenditure, 'Intentional Investing', how charities can align their investment policy with their aims as an organisation, and more recently 'Time and Money' which explores how charities can make the best use of longevity.

Lisa Kiew, Director of Finance and Operations, Maudsley Charity

Lisa is Director of Finance and Operations of Maudsley Charity. She is responsible for the strategic and financial planning underpinning the delivery of the charity's strategic aims. This includes its commercial agreements and other partnerships, investments, trading subsidiary and corporate support functions. Lisa joined the charity in mid-2020 from Quakers in Britain, where she was Head of Finance and Resources. She has led finance and broader organisational functions for a diverse range of not-for-profit organisations for close to 20 years. Actively involved in and a contributor to charity sector developments in strategic finance and governance, Lisa is a Fellow of the Chartered Institute of Management Accountants (CIMA).

Mark O'Kelly, Director of Finance and Administration, Barrow Cadbury Trust

Mark O'Kelly is Director of Finance and Administration at the Barrow Cadbury Trust. He is a chartered accountant and over the last thirty years has worked in a range of finance and development roles in the charity sector, including several years in Peru.

Matt Cox, Investment Director, Esmée Fairbairn Foundation

Matt joined in 2013 and is responsible for overseeing the performance of the Foundation's investment portfolio. He is a CFA charterholder and manages the day-to-day relationship with our investment advisors as well as leading on issues related to responsible investing. Before joining the charitable sector, he spent fifteen years in the investment management industry as an analyst and portfolio manager, managing a variety of portfolios for pension funds, individuals and charities.

Nilesh Pandya, Director of Finance & Resources, Cripplegate Foundation

Nilesh joined Cripplegate Foundation in September 2020. He provides oversight of the Foundation's finances and resources, including HR, Properties and its administrative functions. Prior to this, Nilesh worked in a similar role within the Education sector across two primary schools in London and in internal audit for one of the UK's largest voluntary sector organisations.

Oliver Jones-Davies, Director Client Investments, CCLA

Oliver joined CCLA in September 2009, prior to which he worked in investment management and investment banking. As a fund manager his responsibilities include the active management of cash, bonds and equities for high net worth individuals and charities. In Investment banking he advised and managed complex institutional clients and also took a leading role in the public offering of a number of European government owned companies.

Delegate Biographies

Alex Heynes, Director & Trustee, Wates Foundation

Alex Heynes is an ex-food retail entrepreneur within the healthy food service retail market and founded a 35-outlet chain of Vital Ingredient stores in 2001 before leading a PE transaction in 2016 and exit in 2018. Vital Ingredient serves up over 100,000 healthy made to order breakfasts and lunches a week from its prime Central London take away / eat in retail outlets.

Annabel Lloyd, Vice Chair, Community Foundation Wales

Annabel is an independent communications consultant with an agency background, who has worked across a wide variety of public, private and third sector organisations.

After a few years co-directing Golley Slater in Cardiff, she decided to rejoin the freelance world to get involved in a wider variety of projects.

Bernie McShane, Executive Assistant, John Ellerman Foundation

Bernie works at the John Ellerman Foundation and is responsible for supporting the governance and administration functions. She worked in a Brussels-based UK government body. She then undertook an EA role for a VP in Unilever. During the latter part of her career, she worked for the NHS.

Camilla Reed, Trustee, The Bell Foundation

Camila is a communication and digital transformation expert with over 20 years' experience working globally in English and Spanish for multinationals, UN agencies, NGOs, and individuals. She works with senior leadership teams to help them present and convey their story to a wide variety of audiences. Her career spans the BBC World Service, through to being part of the editorial leadership team at Reuters, where she helped launch the video on demand TV platform Reuters Insider TV.

Caroline Broadhurst, Deputy Chief Executive, Rank Foundation

Caroline has worked at the Rank Foundation since 2006, formerly as the Director of Community Care Projects and as Deputy CEO since 2014. Prior to joining the Foundation, Caroline worked across the non-profit and philanthropy sectors. Caroline is a collaborator, working with others to create change for the better, with a focus on investing in the next generation of social sector leaders. Caroline holds an Executive M.B.A. from Lancaster University and is a Practitioner in Executive Coaching. Through her role as a Clore Social Fellow (2012) Caroline participated in secondments to Candid in San Francisco and Oikocredit in the U.K, researching the key tenets of governance in philanthropy.

Charlie Crossley, Investment Engagement Manager, Friends Provident Foundation

Charlie has been fully immersed in civil society, working on responsible investment, responsible business, and business and human rights issues. Working between philanthropy and civil society at Friends Provident Foundation is thrilling for him, because the foundation has a clear mandate that can accelerate progress on ESG issues, particularly by further balancing social governance with and blending social and environmental concerns.

Ciaran Rafferty, Director, Hilden Charitable Fund

Ciaran has been Director of the Hilden Charitable Fund (HCF) since October 2021, prior to which he held a senior role at City Bridge Foundation for 20 years. HCF is an endowed family foundation, established in 1963.

Henrietta Shields, Trustee, Mary Kinross Charitable Trust

Henrietta Shields is the granddaughter of Mary & John Kinross who founded the Mary Kinross Charitable Trust (MKCT) and is a third-generation family Trustee. MKCT's endowment supports grant making in areas including medical research and creative therapy & support for youth, immigrants, and people at risk or who have experienced the criminal justice system.

Keri Brown, Finance Manager, Francis Scott Trust

I am an accountant, by background and have 25 years' experience of working in the not-for-profit sector, as both an employee and a Trustee. I have recently started working for the Francis Scott Trust, managing investment portfolios and social investment loans.

Liz Winder, Chief Operating Officer, Paul Hamlyn Foundation

Liz is a Chartered Accountant who has spent her career in the not-for-profit sector. She has recently joined the Paul Hamlyn Foundation as Chief Operating Officer. Prior to that she performed a similar role at Lloyds Bank Foundation.

Mark Darren Hart, Finance and Operations Manager, John Ellerman Foundation

I am the Finance and Operations Manager for the John Ellerman Foundation, joined in August 23. Prior to that I spent 20 years in the Banking and Financial Services industry in various financial, IT Project type roles. I am a qualified Accountant, FCCA.

Matt York, Foundation Manager, Santander UK

Matt York is the Santander UK Foundation Manager, a corporate foundation working to alleviate digital and financial exclusion in the UK.

Miriam Rich, Trustee, Rayne Foundation**Neil Stuart, Financial Controller, Peter Harrison Foundation**

Financial Controller of the Peter Harrison Foundation. Chartered accountant. Worked in professional practice for many years before joining the Peter Harrison Foundation in 2014.

Oluyinka Owora, Grants Officer, Caretech Charitable Foundation

He joined CareTech Community Services in February 2022. His focus has been on providing dedicated support to residents with mental health challenges and learning disabilities. In a display of his commitment to CareTech's values, Oluyinka transitioned to the Foundation team in July 2023, assuming the role of Grants & Finance Officer.

Raji Hunjan, Interim Chief Executive Officer, Tudor Trust

Raji Hunjan is currently the Interim CEO of the Tudor Trust and has been in post since May 2023. Prior to this she was a Programme Director at the Oak Foundation. Raji has a blended experience of working in philanthropy and running small campaigning and advice organisations.

Robert Lewis-Thorburn, Investment Manager, Charities Aid Foundation

Robert has worked in the NGO space for 18 years across three continents. His professional experiences have included the management of C.America volunteering programmes with SEE, Organisation Development advising in W.Africa with VSO and fundraising and funding roles based in the UK. He holds several qualifications in various analytical disciplines.

Ruby Frankland, Connect Fund Manager, Barrow Cadbury Trust

Ruby joined the Barrow Cadbury Trust in 2022 as the Manager of the Connect Fund in partnership with Access, the Foundation for Social Investment. She has a range of international experience working with digital marketplace start-ups across Sub-Saharan Africa, social investment funds and a network for corporate social innovation.

Sally Prentice, Interim Director, Joseph Levy Foundation

Sally Prentice is the Interim Director of the Joseph Levy Foundation and is a former Governor of the Walcot Foundation. She has an MSc (Distinction) in Grant-making, Philanthropy and Social Investment from Bayes Business School. She has previously been the CEO of Carers Network and a Relate centre in south London.

Sarah Ridley, Director, Peter Harrison Foundation

Sarah has over 30 years' experience of charitable grant giving in the UK and US. From 2014 to 2021 she was responsible for The London Marathon Charitable Trust's substantial grants programme, helping to encourage wider participation in physical activity. She is currently a trustee of the Charles Dickens Museum and Carers Worldwide.

Sergio Ung, Investment Associate, Guy's St Thomas' Foundation

Sergio Ung is an Investment Associate at Guy's & St Thomas' Foundation, with a focus on impact investments that align with the Foundation's aspiration to invest in a healthier society.

Simin Wadiwala, Associate Trustee, Friends Provident Foundation

Simin Wadiwala is an Associate Trustee at Friends Provident Foundation. Sim worked with their local Community Land Trust to set up a student housing cooperative from 2018-21. Now Sim sits on Finance Group of Radical Routes who make loans and support small housing coops, worker coops and social centres.

Sue McDonald, Director of Finance, Nesta