



COUNCIL FOR
**Economic
Education**

Teaching Opportunity

VANTAGE POINT: GROWING COMPANIES, GROWING WOMEN LEADERS

TUESDAY, MAY 12, 2015

7:30 AM

Breakfast

7:55 AM

The 2014 William A. Forbes Public Awareness Award

8:05 AM - 9:00 AM

Panel and Q&A

PANELISTS

MELLODY HOBSON

President, Ariel Investments

LISA GERSH

CEO, Goop

BARBARA NOVICK

Vice Chairman, BlackRock

Moderator

SAMANTHA KAPPAGODA

Chief Economist & Co-Founder, Risk Economics

The 2014 William A. Forbes Public Awareness Award will be presented to

PROF. ANNAMARIA LUSARDI

The George Washington University

A pioneer in the study of financial literacy, Prof. Lusardi is widely renowned for her extraordinary contributions to the field. Among her numerous achievements, she designed a measurement of financial literacy that has been used in national surveys around the world, while her theoretical and empirical work has helped to make a compelling case for the cost and consequences of financial illiteracy. She has published many papers and two books on the topic of financial literacy and also edited special issues on financial literacy for the Journal of Pension Economics and Finance and Numeracy.

Prof. Lusardi currently serves as the Academic Director of the Global Financial Literacy Excellence Center (GFLEC) and is the Denit Trust Chair of Economics and Accountancy at GW. Previously, she was the Joel Z. and Susan Hyatt Professor of Economics at Dartmouth College, where she taught for twenty years. She has also taught at her alma mater Princeton University, the University of Chicago Public Policy School, the University of Chicago Booth School of Business, and Columbia Business School. In 2008 she was a visiting scholar at Harvard Business School. Prof. Lusardi also chairs the Research Committee at the OECD/International Network on Financial Education and the Programme for International Student Assessment (PISA)'s financial literacy expert group.

As the winner of the Forbes Award, Prof. Lusardi also received a monetary reward of \$1,000, made possible by a gift from the Calvin K. Kazanjian Economics Foundation to CEE. In his lifetime, Calvin K. Kazanjian was an ardent supporter of economic literacy programs. Fittingly, entrepreneur William Forbes, for whom this award is named, helped catapult Mr. Kazanjian's small confectionary company—Peter Paul Almond Joy—into an industry leader.



PANELIST BIOS

MELLODY HOBSON

President, Ariel Investments

Melody directs Ariel's firm-wide management and strategic planning, overseeing all operations outside of research and portfolio management, and serves as chairman of Ariel Investment Trust's board of trustees.

Melody is also chairman of the board of DreamWorks Animation SKG, a director of Estée Lauder and Starbucks, chairman of After School Matters, and a board member of the Lucas Museum of Narrative Art, the Chicago Public Education Fund and Sundance Institute. She contributes regularly to CBS News, the Tom Joyner Morning Show and Black Enterprise magazine.

Melody earned her AB from Princeton's Woodrow Wilson School of International Relations and Public Policy.

LISA GERSH

CEO, Goop

Ms. Lisa Gersh Hall is the CEO of GOOP. Previously, Lisa served as the President and CEO of Martha Stewart Living Omnimedia Inc. from 2011 until 2013. She was responsible for all aspects of day-to-day operations, in addition to overseeing Martha Stewart Living Omnimedia, Inc's businesses, which includes Publishing, Broadcasting and Merchandising. Lisa served as the President of Strategic Initiatives of NBC Universal, Inc. from 2007 to 2011. She was responsible for the Weather Channel Company partnership serving as interim CEO. In addition, while at NBC Universal, Lisa pioneered the creation of the company's groundbreaking Education Nation platform. She joined NBC Universal in 2007 after NBC acquired Oxygen Media. She co-founded Oxygen Media, LLC in 1998 and served as the President and COO. Lisa led the day-to-day operations of Oxygen Media, and served as the principal engineer of Oxygen's foundation partnerships with Carsey-Werner LLC and Harpo Productions, Inc. She played a major role in securing distribution for the women-oriented network, which is in 52 million homes. She has been a Director at Hasbro Inc. since July 1, 2010. She served as Director of The Knot, Inc. from June 6, 2005 until June 29, 2010. Lisa holds a B.A. in Political Science and Economics from the State University of New York Binghamton and a J.D. from Rutgers Law School.

BARBARA NOVICK

Vice Chairman, BlackRock

Barbara G. Novick, Vice Chairman, is a member of BlackRock's Global Executive and Global Operating Committees and Chairs the Government Relations Steering Committee. From the inception of the firm in 1988 to 2008, Ms. Novick headed the Global Client Group and oversaw global business development, marketing and client service across equity, fixed income, liquidity, alternative investment and real estate products for institutional and individual investors and their intermediaries worldwide. In her current role, Ms. Novick heads the firm's efforts globally on Government Relations and Public Policy, and she serves as a board member to the BlackRock Equity-Liquidity and BlackRock Closed End fund families.

Prior to founding BlackRock in 1988, Ms. Novick was a Vice President in the Mortgage Products Group at The First Boston Corporation. Ms. Novick joined First Boston in 1985 where she became head of the Portfolio Products Team. From 1982 to 1985, Ms. Novick was with Morgan Stanley.

Ms. Novick has authored numerous articles on asset management and public policy issues. Ms. Novick is a member of CFA Institute's Future of Finance Advisory Council and Reuters' Editorial Advisory Board. She currently serves as a Trustee of Cornell University, UJA-Federation, and the HCM Foundation, and coaches in the Westchester Youth Soccer League. Ms. Novick previously served on the boards of Robert Toigo Foundation (2007-2010), City Harvest (2010-2012) and Westchester Day School (2000-2005), and served as both Treasurer and Trustee of Westchester Jewish Center (1994-2012). Ms. Novick earned a BA degree, cum laude, in economics from Cornell University in 1981.



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SAMANTHA KAPPAGODA

Chief Economist and Co-Founder of Risk Economics
CEE Board Member

Samantha Kappagoda is Chief Economist and co-founder of Risk Economics, Inc. (www.riskecon.com), a New York City based advisory firm. She provides advisory services as well as research and development (R&D) of rigorous analytics with applications to large-scale, real-world modeling and surveillance of global macroeconomic trends, socioeconomics, demographics and geopolitics.

As lead for the RiskEcon® macroeconomic and portfolio strategy advisory practice, Samantha's areas of expertise include currency, fixed income, commodity and capital markets activity, as well as business cycle dynamics, econometric time-series and longitudinal analyses of consumer behavior, labor markets, wealth and income distribution, housing, population and immigration, political risk and international trade, resource allocation, environment, health, aging and retirement.

Samantha is co-lead investigator at RiskEcon® Lab for Decision Metrics, established at NYU Courant Institute for Mathematical Sciences in 2011, in order to apply a range of computational methods to analyze consumer and population-related societal trends. She is also Visiting Scholar at Courant Institute, and associated with the Social Media and Political Participation (SMaPP) Lab at NYU, an interdisciplinary collaboration that researches the relationships between social media and political behavior.

Previously, she was Senior Economist at Caxton Associates LP, a hedge fund established in 1983, investing in global fixed income, currencies, commodities and equities. She was a key member of Caxton Global, the firm's flagship global macro fund, which, at its peak, had approximately \$12 billion of assets under management. Her macroeconomic and demographic analytics and development of proprietary econometric models of financial markets, the global economy, central bank and related policy actions guided the firm's senior decision makers during her thirteen year tenure there.

Samantha pursues her broader research interests by serving as a senior editorial advisory board member of The Journal of Risk Finance (JRF), an Emerald Publications journal which provides a rigorous forum for the publication, both by academics and practitioners, of theoretical and empirical research related to the financing of risk, with a long-standing focus on issues of market convergence. She was originally the founding Managing Editor of JRF in 1999, initially published by Institutional Investor Journals/Euromoney, before its successful sale to its current publisher. She has also served as Special Editor for Risk Management, for The Journal of Alternative Investments, another Institutional Investor journal.

Samantha received an M.B.A. in Analytic Finance and Statistics from the University of Chicago Booth School of Business. She also holds an M.A. in Economics from the University of Toronto, and graduated with a B.Sc. (Honors) in Mathematics from Imperial College, London.