

Advisory Board

The Center for Financial Services (CFS) Advisory Board provides expertise to strategically guide the mission and direction of the CFS. In addition, the advisory board offers guidance to the director on speakers, topics, and sponsors for conferences, events, and panel discussions. It also assists with expanding the network of participants, building the CFS stature and brand, and serving as a key resource for activities encompassing continuing education, student engagement, and networking.

Advisory Board Members

- | | |
|---------------------|---|
| Hugo Barth | <i>Principal and Senior Portfolio Manager, Prudential Financial</i> |
| Doug Borkowski | <i>Managing Director, Bank of America Merrill Lynch</i> |
| Seth Finkel | <i>Managing Director, Neuberger Berman Wealth Management</i> |
| Larry Gore | <i>Senior Vice President, Tompkins Financial Advisors</i> |
| Brodi Jackson | <i>Co-Founder and Managing Partner, Caerus Ventures</i> |
| Sandi Klose | <i>Global Head of Business Planning and Operations, Refinitiv</i> |
| Labib Mahfouz | <i>COO and CFO, Evince Asset Management LP</i> |
| John Melvin | <i>Managing Director and Head of Portfolio Management, HIMCO</i> |
| Chris Milner | <i>President and CEO, The Oakleaf Group</i> |
| Matt Petrozelli | <i>CEO, Valley National Financial Advisors</i> |
| Jeff Rutledge | <i>Principal, Portfolio Manager, Bessemer Trust</i> |
| Julian Sluyters | <i>Advisor, GECKO Governance</i> |
| Rick Van Benschoten | <i>CEO, Lenox Wealth Advisors</i> |

contact us

Kathleen Weiss Hanley
Director
610.758.3432 | kwh315@lehigh.edu

Meg Foley Wolf
Assistant Director
610.217.5913 | maff02@lehigh.edu



Center for Financial Services



LEHIGH
UNIVERSITY

College of
Business and
Economics

visit cbe.lehigh.edu/cfs for more information

The Center for Financial Services (CFS) seeks to promote a collaborative exchange of ideas on critical issues affecting the financial services by bridging theory and practice.

By leveraging Lehigh's faculty and alumni, the CFS aims to bring the latest developments in research and practice together to stimulate discussion and generate new ideas for education and knowledge in the field of financial services.

The CFS hosts speakers and conferences to bring together alumni, industry participants, academics, and regulators on topics of interest. In addition, the CFS features academic research on topics that are relevant to practitioners, regulators, and industry leaders.

In support of this mission, the CFS oversees the Financial Services Laboratory (FSL), which serves as the vehicle for understanding, creating, and employing financial data and software on the Lehigh University campus.



past events

Third Annual Research Symposium at the Fox School of Business

October 26, 2018

The "Philly Five" Regional Finance Conference was co-sponsored by Drexel University, Lehigh University, Temple University, University of Delaware, and Villanova University; it featured five completed research papers presented seminar style and mini presentations of "early ideas" with preliminary findings.

Fifth Annual Conference on Financial Market Regulation at the SEC

May 10 - 11, 2018

The SEC, CFA Institute, CFS, and CFP at the Robert H. Smith School of Business jointly hosted the fifth annual conference on the regulation of financial markets and brought together participants from academia, industry, government agencies, and the SEC for an exchange of views on topics of relevance to the Commission. The presenters and discussants tackled interesting and insightful topics, including crowdfunding, hedge fund liquidity management, ETFs, fragmented markets, SEC's comment letter process, investment advisor misconduct, and portfolio pumping, to name a few.

Second Annual CFS New York City Conference on Challenges Facing Asset Management at Thomson Reuters

December 5, 2017

CFS hosted a panel discussion of financial experts who explored the timely topic of "Challenges Facing Asset Management." The panel discussed various areas in asset management such as active vs. passive investing, ETFs, the increasing role of technology, and MiFID II. The conference was held in cooperation with Thomson Reuters, Lehigh Wall Street Council, and the Center for Financial Services Advisory Board.

Director

Kathleen Weiss Hanley joined Lehigh University's College of Business and Economics (CBE) faculty in 2015 as the Bolton-Perella Endowed Chair in Finance and as the director of the CFS. Before coming to Lehigh, Hanley was the deputy chief economist of the SEC and the deputy director of the Division of Economic and Risk Analysis, where she oversaw the integration of economic analysis into policy. She also managed the division's research activities, data analytics, and risk assessment initiatives.

Prior to that time, she was a senior economist at the Board of Governors of the Federal Reserve System in the Risk Analysis section and a senior financial economist at the SEC. She has been on the faculty at the University of Maryland and at the University of Michigan.

Hanley's research focuses on capital formation, systemic risk, and market pricing and has been published in leading finance journals, including *The Journal of Finance*, *Journal of Financial Economics*, and *The Review of Financial Studies*. She received her bachelor's degree from Indiana University and her doctorate from the University of Florida.



Assistant Director

Meg Foley Wolf joined the CFS in February 2017. Wolf's background is in development, sales, marketing, and non-profit. She joined her alma mater in 2008, where she has served in several key roles in Lehigh University's Development and Alumni Relations department, including associate director of marketing, director of reunion giving, and CBE major gifts officer. Wolf has been an integral part of the development of the center and is responsible for attracting the very talented CFS board. She assists with CFS events, memberships, marketing, and advancing the mission and goals of the center. Wolf has dual degrees from Lehigh in journalism and marketing.

