

2017 *Save the Dates*

ABOUT THE HAVERFORD TRUST COMPANY



THE HAVERFORD TRUST COMPANY

The Haverford Trust Company provides highly personalized investment management services based on our *Quality Investing* approach. Refined over three decades, the Haverford *Quality Investing*[®] strategy is committed to maximizing returns while minimizing risk throughout the entire market cycle.

From serving a wide range of investors, Haverford has learned how to translate real-world situations into effective financial strategies. Our clients all have one thing in common – a wealth management need that may be fulfilled by the goals of *Quality Investing* preservation and growth of capital, stable income growth, lower volatility, predictability, objective advice, risk management, stability, and service.

We are uniquely positioned to serve those investors with \$1 million or more of investable assets including:

Individuals and Families
Endowments
Employers
Nonprofit Organizations
Religious Organizations

Institutions and Institutional Consultants
Private Foundations
Employee Benefit Plans
Trusts and Estates
Financial Advisers

For more information, please visit us at haverfordquality.com.

Financial Literacy Workshop



Wednesday, June 7
11:30 AM - 1:30 PM
Top of the Tower
Philadelphia, PA

Thursday, November 2
11:30 AM - 1:30 PM
Philadelphia Country Club
Gladwyne, PA

Course Topics

Stock Market Basics | Understanding Investments
Personal Finance | Estate Planning

PRESENTERS



MAXINE
CUFFE, CFA
*Senior Research
Analyst*
The Haverford
Trust Company



SUZANNE
HECHT, ESQ.
Partner
Haney & Hecht



LYDIA HOLIAT
*Vice President &
Portfolio Manager*
The Haverford
Trust Company



CHRISTINE
WALKER, CFP[®],
CIMA[®]
*Vice President &
Portfolio Manager*
The Haverford
Trust Company



LARISSA
WHITMAN, ESQ.
Partner
Drinker, Biddle &
Reath LLP

EDUCATING, EMPOWERING, AND

INSPIRING WOMEN

Daphne Rowe

President & Founder

Pembroke Philanthropy Advisors

drowe@pembrokephilanthropy.net



Daphne Rowe is the President and Founder of Pembroke Philanthropy Advisors, a philanthropy advising and foundation management firm. She has a public policy degree from the Fels Institute at the University of Pennsylvania and has worked in the non-profit sector since 1981.

Daphne managed a multi-million dollar youth development initiative in Philadelphia for the William Penn Foundation, was a Program Officer at the Philadelphia Foundation and was named its first Director of Donor Services. Before founding Pembroke Philanthropy Advisors in 2005,

Daphne served as Program Officer for the 1957 Charity Foundation and

chaired the Valentine Foundation. She is a founding member of the Valentine Foundation's Visionary Leadership Fund, which supports leadership development opportunities for women working in women- and girl-serving organizations. She also directed The SEI Giving Fund™, SEI Investments' donor advised fund. Daphne serves on the Board of Philanthropy Network Greater Philadelphia, the region's grant-making association, and co-chairs its Member Services Committee.

Dana Spain

Entrepreneur, Philanthropist, & Managing Partner

McSpain Properties

dana@mcspainproperties.com

McSpain Properties

—Pioneering Urban Development—



Dana Spain is a serial entrepreneur and philanthropist. She was Director of Training and Communications at her family company, Spain's Gifts/ Dollar Express, until its sale in 2000. In 2001, Dana became the COO and owner of Philadelphia Style Magazine, a brand she expanded to Washington, DC and into three award-winning websites. Dana sold Style in 2008 and began DLG Communications, a branding and marketing consultancy specializing in digital strategy and new media marketing.

Dana is currently the managing partner of McSpain Properties, a real

estate development company committed to revitalizing Philadelphia's neighborhoods. In 2006, Dana founded Philadelphia Animal Welfare Society (PAWS), Philadelphia's largest No-Kill rescue. She serves on the boards of Liberty USO, the Michael P. Donatucci Foundation, and the City of Philadelphia Mural Arts Program; consults for the Veterans Multi-Service Center; sits in the "shark tank" at Temple's Fox School of Business and lectures on entrepreneurship at Holy Family University. Most recently, Dana was elected the President of the Board of the Veterans Comfort House and is actively reenergizing this facility to serve the needs of homeless veterans. Her expertise about what it takes to succeed in business has been tapped by multiple media outlets. Dana resides in Washington Square with her fiancé and four rescued cats.

Program

WELCOME

Elissa Faraglia

Portfolio Assistant

The Haverford Trust Company

PANEL DISCUSSION AND AUDIENCE Q&A

Moderator

Lisa Tierney

Certified Life Strategies Coach

TIERNEY Coaching & Consulting, Inc.

Panelists

Tami Caesar

Chief Financial Officer

National Multiple Sclerosis Society

Monica Taylor Lotty

Executive Vice President & Chief Development Officer

Children's Hospital of Philadelphia

Linda Mantai

Vice President

Flyers Charities

Daphne Rowe

President & Founder

Pembroke Philanthropy Advisors

Dana Spain

Entrepreneur, Philanthropist, & Managing Partner

McSpain Properties

Lisa Tierney

Certified Life Strategies Coach
TIERNEY Coaching and Consulting, Inc.
lisatierney@comcast.net



Lisa Tierney is a certified life strategies coach and marketing strategist who is committed to empowering female professionals who work in Corporate America. She offers a unique approach to help women succeed on their own terms. Her firm, TIERNEY Coaching and Consulting, provides a winning combination of traditional consulting with professional coaching. Her work addresses all the nuances of success – mind, body and spirit.

The women Lisa works with start asking more questions, adopt a more relaxed, yet authoritative demeanor and command the attention of others like never before. Her clients unanimously report increased self-confidence, more respect from their peers at work – both men and women - and an overall greatly improved professional experience.

Tami Caesar

Chief Financial Officer
National Multiple Sclerosis Society
tami.caesar@gmail.com



Tami Caesar has 26 years of experience in finance, fund development and program operations within the not-for-profit sector. She is currently the CFO of the National MS Society and during past year completed the centralization of the accounting, budgeting and finance functions for 36 chapters and the national headquarters, while also creating the MS Society's first team dedicated to financial planning and analysis. Prior to that she was the President of National MS Society Greater Delaware Valley Chapter with offices in Philadelphia and Wilmington. Tami received her MBA

from Villanova University and has served as Social Enterprise Faculty at the School of Business since 2014. Tami has a long history of serving on the boards of not-for-profit organizations since her early career in Seattle and later in Orlando and Philadelphia. She lives with her husband, Steve, in Rose Valley.

Monica Taylor Lotty

Executive Vice President & Chief Development Officer
Children's Hospital of Philadelphia
lottym@email.chop.edu



Monica Taylor Lotty joined Children's Hospital of Philadelphia (CHOP) as Executive Vice President and Chief Development Officer in October of 2016. Monica brings significant expertise to this role, having served most recently as Vice President for Development and Alumni Relations at the University of Delaware, and previously as Executive Director for External Affairs at the Wharton School at the University of Pennsylvania. She has dedicated more than 20 years to working with families, business leaders and philanthropists in our community.

As Chief Development Officer, Monica leads efforts to help volunteers and donors at all levels meet their philanthropic goals through meaningful gifts of support to CHOP. She guides vital funding to fuel the breakthroughs, treatments and cures that heal children and save lives. Monica is a native of Ardmore, Pennsylvania and has a Juris Doctor from The James E. Beasley School of Law at Temple University and a Bachelor of Arts in Government from Georgetown University.

Linda Mantai

Vice President
Flyers Charities
lmantai@comcast-spectacor.com



Linda Mantai was named Vice President of Flyers Charities in 2014. In this role, Linda oversees all activities and events put on by Flyers Charities, including the annual Flyers Wives Fight for Lives Carnival. Linda has spent the last 22 years working for the Flyers in a variety of capacities. She joined the organization in 1994 as a Public Relations Assistant and since then has held positions in Flyers public relations, marketing, game presentation and community relations. She was most recently the club's Senior Director of Project Development, overseeing special projects for the team while acting

as a liaison between the team's hockey department and its business operations. Linda graduated from Villanova University in 1991 and spent three years with WCAU-TV in Philadelphia prior to joining the Flyers. Linda resides in Cinnaminson, NJ with her husband Brian.
