

# MAXIMIZING YOUR INVESTMENT:

*How nonprofit intermediaries can help you make safer, socially responsible investments*

*Wednesday, October 14, 2009*

*The Seattle Foundation*

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## BIOGRAPHIES

### **MODERATOR**

#### **PETER BERLINER**

*Director, PRI Makers Network*

Peter Berliner joined PRI Makers Network as Managing Director in January 2009. Berliner was formerly the Program Director of the Paul G. Allen Family Foundation and Executive Director of the Children's Alliance, a nonprofit organization advocating for children in Washington State. Berliner served as President of the Philanthropy Northwest board from 2003- 2005.

### **PANELISTS**

#### **TRACY KARTYE**

*Social Investment Analyst, Annie E. Casey Foundation*

Ms. Kartye is a key member of the Annie E. Casey Foundation's Social Investment team. The Foundation is a private charitable organization whose principal mission is to help build better futures for disadvantaged children and families. As the Social Investment Analyst, Ms. Kartye is involved in all aspects of the social investment portfolio including managing the Mission-Related Deposit program as well as conducting financial analysis and due diligence on the Program Related Investments. Ms. Kartye has a strong background in community and economic development. Prior to joining the Foundation, Ms. Kartye was an Assistant Program Officer in the Local Initiatives Support Corporation-Houston office. In this position, she managed organizational development and project related trainings for Houston area Community Development Corporations; and provided organizational development assistance to small and emerging CDCs. In addition, Ms. Kartye has worked for the Bedford Stuyvesant Restoration Corporation in Brooklyn, New York where she focused on building the capacity of the Restoration Capital Fund, a community development financial institution; coordinated trainings; and provided technical assistance to local entrepreneurs. Tracy has a Masters in Urban Planning from the Robert F. Wagner Graduate School of Public Service at New York University and received her Bachelor of Arts degree from Hendrix College.

#### **JANET OZARCHUK**

*VP and Treasurer, Local Initiatives Support Corporation (LISC)*

Janet Ozarchuk is LISC's Vice President and Treasurer. At LISC, her responsibilities include cash management, investment management, debt management, and CDC loan administration. Janet is also a member of LISC's Credit Committee, Loan Watch Committee, and Portfolio Monitoring Committee. Prior to joining LISC, Janet spent 15 years in public finance on Wall Street with Smith Barney and Merrill Lynch, where she specialized in financings for not-for-profit hospitals and health systems and interest rate SWAPs and derivatives products. Janet earned her B.A. from Fordham College in economics and biology. She earned her M.B.A. at Harvard University.

**JON CLARKE**

*Senior Program Officer*

Jon joined Impact Capital in January of 2007 and he serves as the organization's credit officer responsible for underwriting loans, providing initial technical assistance, and evaluating underperforming properties. Prior to joining Impact Capital, Mr. Clarke was a housing developer for Beacon Development Group, where he managed the development of multiple affordable housing projects for nonprofit and Housing Authority clients throughout Washington State. He also worked as a development analyst for the Tax Credit Division of the Washington State Housing Finance Commission. He has a BA in Economics from Holy Cross, and an MS in Urban Planning from the University of Wisconsin. Mr. Clarke supervises lending, meets with investors, manages compliance, and monitors loan portfolios in Spokane. He will be supervising lending within the Vibrant Communities Spokane project and assist with providing technical assistance to Impact Capital's efforts in the neighborhood.

**LAVERNE WOODS**

*Partner, Davis Wright Tremaine LLP*

LaVerne Woods chairs Davis Wright Tremaine LLP's Tax-Exempt Organizations (TEO) group. She has over 20 years of experience in working with the nonprofit sector and is a frequent writer and speaker in the area both nationally and regionally. Her practice spans a broad range of issues affecting charities, including federal tax exemption, governance, endowment management, mergers and joint ventures. She has a special interest in healthcare, social entrepreneurship and international philanthropy. LaVerne represents organizations across the nonprofit spectrum, including: family and corporate foundations, community foundations, supporting organizations, global health and relief organizations, hospitals, health plans, colleges and universities, charitable trusts, social service and arts organizations, trade associations and government agencies.

**Education**

J.D., Harvard Law School, 1983, cum laude

Fulbright Scholar, Dakar, Senegal, 1978-79

B.A., Yale University, 1978, summa cum laude, Phi Beta Kappa