

INVESTMENT TEAMS

COLGATE

As Colgate doesn't disclose the backgrounds of its investment team, the few details below came from a 2015 Colgate Scene article featuring JS Hope and LinkedIn profiles. Importantly, Mr. Hope splits his time between serving as CIO and University Treasurer.

Joseph Hope

Colgate University

Senior Vice President for Finance and CIO
2008-Present
Undisclosed 1997-2008
BA Economics, Colgate University 1997

Jenna Schell

Colgate University

Investment Analyst

July 2017-present

BA Early Childhood Education,
State University of New York Cortland, 2017
AD Business, Tompkins Cortland CC, 2013

Brentd Simpson

Colgate University

Investment Director, 2021-Present

Investment Manager, 2016-Present

Associate VP for IPR and

Special Assistant to the President

for Legal Affairs, 2001-Present

Director of Advancement Services, 2004-2008

Associate Director of the Annual Fund, 2001-2004

MBA Finance, University of Iowa

BA Financial Management, University of St. Thomas

Marissa Tuttle

Colgate University

Director of Endowment Operations 2022-Present

Investment Analyst, 2016-2022

St. John Fisher College

Wellness Education Programer,

Tutor, Peer Advisor, 2013-2016

BS, Psychology, St. John Fisher University, 2012-2016

WESLEYAN

By contrast, Wesleyan's *ten* member investment team is lead by Anne Martin, a protege of David Swensen. It includes four individuals with deep, relevant investment/research/operations backgrounds, supported by junior members with impressive academic credentials, including three with CFAs.

Anne Martin

Chief Investment Officer

Anne Martin is a protégé of David Swensen, with over 35 years of experience in alternatives-based endowment investing, becoming Wesleyan University's Chief Investment Officer in 2010. She leads Wesleyan's investment operations and has overseen strong long-term endowment performance. She previously was a Director at the Yale Investments Office. Prior to joining Yale, Anne was a general partner at private equity firm Rosewood Capital in San Francisco, California where she focused on Internet, software, and business service investments. Prior to that, Martin was a managing director in the technology group at Alex. Brown, an investment bank focused on emerging growth companies. She is a graduate of Smith College, cum laude, Phi Beta Kappa, and holds an M.B.A. from Stanford Business School.



Jonathan Farrar, CFA

Managing Director

Jon joined in 2014. Prior to Wesleyan University, he was a Director at Highmount Capital, a multi-family office where he was responsible for managing the firm's external investment manager selection and due diligence efforts in the public markets. Beginning in 2007, Jon was a member of the research team at Veritable, LP, a multi-family office where he covered international investment managers for one of the firm's internally managed commingled investment pools. B.S. Physics and Mathematics summa cum laude, Phi Beta Kappa Lafayette College.



Matthew Magenheim

Matt joined in 2018. He was previously a Co-Founder and Partner of Development Capital Partners, an investment manager focused on Africa and other frontier markets. Prior to Development Capital, Matt was based in Johannesburg where he concentrated on sub-Saharan Africa for Allan Gray, a South African asset manager with over \$40 billion in assets under management. Previously, Matt worked on private equity investments in Southeast and Central Asia for Leopard Capital and Projects International. He also worked in the Investment Banking Division of Morgan Stanley. A.B. summa cum laude, Bowdoin College, M.B.A. with honors and distinction from Columbia Business School.



Brett Salafia

Brett joined in 2005. His responsibilities include monitoring and verifying third party investment performance reporting, managing operational activities, and assisting in manager due diligence. Brett also acts as a liaison with the University's Office of Finance and Administration, auditors, custodians, and external counsel. B.S. in Finance from Quinnipiac University, M.B.A. in Finance from the University of Hartford.

