

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. Importantly, **Mr. Hope splits his time between serving as CIO and treasurer.**

Joseph Hope

Joined Colgate in November 2008 as director of investments. Named Chief Investment Officer in 2015. Senior VP for finance and administration, CIO, and Treasurer since 2018.
1997-2008 Not published
BA Economics, Colgate University 1997

Brendt Simpson

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 Mgmt., Univ. of St. Thomas

Marissa Tuttle

Director of Endowment Operations 2022-Present
Investment Analyst, 2016-2022
St. John Fisher College
Wellness Education Programmer,
Tutor, Peer Advisor, 2013-2016
BS Psych, St. John Fisher Univ. 2016

Jenna Schell

Investment Analyst
July 2017-present
BA Early Childhood Education,
State University of New York Cortland 2017
AD Business, Tompkins Cortland CC 2013

WESLEYAN

By contrast, Wesleyan's **ten member investment team** is lead by Anne Martin, a David Swensen protege. Four individuals have deep, relevant investment backgrounds. They are supported by junior members with impressive academic credentials, **including three with CFAs.**



Anne Martin Chief Investment Officer

Anne Martin is a protege of David Swensen at Yale, with over 35 years of experience in alternatives-based endowment investing, becoming Wesleyan University's Chief Investment Officer in 2010. 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 **MBA from Stanford Business School.**



Jonathan Farrar, CFA Managing Director

Jon joined in 2014. Prior to Wesleyan, 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. 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 \$40B 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 S. Jafia

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.**