

**2024
INVESTMENT CHALLENGE
PROGRAM CONFERENCE**

Investment Manager Bios

TVA

SCOTT ELDRIDGE

SENIOR PORTFOLIO MANAGER, ALLSPRING GLOBAL INVESTMENTS

Focus and Experience



Scott Eldridge is a portfolio manager for the Closed-End Fund Strategies team at Allspring Global Investments. He joined Allspring from its predecessor firm, Wells Fargo Asset Management (WFAM). Scott joined WFAM from Invesco PowerShares, where he served as director of fixed income product strategy. Prior to that, he was a director of portfolio management at Caprin Asset Management. Earlier in his career, Scott held positions in credit research, trading, and portfolio management at Tattersall Advisory Group as well as various commercial banking roles at Wachovia Bank.

Scott earned a bachelor's degree in business administration with an emphasis in finance and economics from the University of Richmond. He has earned the right to use the Chartered Financial Analyst® (CFA®) designation.

BRUCE CROSBY
MANAGING PARTNER, HEALTH VELOCITY CAPITAL



Focus and Experience

Bruce has spent 25 years as a healthcare executive, entrepreneur, and venture and growth stage investor. He has helped build and invested in a number of high growth, successful healthcare software and services companies with revenues ranging from \$10 million to \$700 million. Bruce's executive roles have all been focused on the growth of these businesses and included senior responsibility for Business Development, Corporate Development, Product Development, Strategy, Sales, and Marketing. He has served customers in many of the largest sectors within healthcare services.

Bruce's executive roles have been with Compassus, the nation's 3rd largest hospice and palliative care company; Healthways (NASDAQ: HWAY), the nation's largest independent disease and population health management company and largest Medicare Advantage consumer services benefit provider; and The Advisory Board Company (NASDAQ: ABCO), one of the nation's largest health system best-practice research and software businesses. At JPMorgan Partners, Bruce led investments in Accordant Health Services (acquired by AdvancePCS) and National Surgical Care (acquired by Amsurg), and played a key role in the buyout of the initial hospitals to form IASIS Healthcare (acquired by TPG Capital). At Healthways, he drove investments in D2Hawkeye (acquired by Verisk Analytics) and iTriage (acquired by Aetna). Bruce serves on the boards of Spero Health, Three Oaks Hospice, and Contessa Health.

Education and Professional Credentials

- MBA, The Wharton School at The University of Pennsylvania
- AB, Princeton University

Board Affiliations

- Board Member, Spero Health
- Board Member, Three Oaks Hospice
- Board Member, Contessa Health

CELIA DALLAS
CHIEF INVESTMENT STRATEGIST, CAMBRIDGE ASSOCIATES



Focus and Experience

Celia Dallas is the Chief Investment Strategist and a Partner at Cambridge Associates.

Celia is responsible for formulating the firm's global investment strategy and has been at Cambridge Associates for nearly 30 years. In addition to her role, she has contributed to research initiatives and publications covering a wide range of capital market and investment planning topics, including portfolio construction, endowment spending, liquidity management, and tactical asset allocation. She also authors our quarterly publication, VantagePoint, in which she shares our house view and advice. She is also a frequent presenter and moderator at firm events and industry conferences.

Outside of work, Celia is a Board Member and Investment Committee Chair of the Virginia Environmental Endowment.

Before joining Cambridge Associates, Celia researched, wrote, and presented market analysis commissioned by Fortune 500 clients for Harlan Brown & Company, a competitive intelligence consulting firm. She also worked for the Employee Benefit Research Institute (EBRI), where she conducted research on retirement income security issues.

Celia holds an MBA from the Darden School of Business at University of Virginia and a BA in Economics from University of Pennsylvania.

IAN MONTEITH
SENIOR INVESTMENT DIRECTOR, CAMBRIDGE ASSOCIATES

Focus and Experience



Ian is a Senior Investment Director with over ten years of industry experience. He primarily advises pension clients on asset allocation strategy, manager selection, and investment program evaluation.

Ian joined Cambridge Associates in 2015 as an associate in the middle office, assisting investment teams and clients with investment implementation, operations, reporting, audit and regulatory needs. In this role, he represented the pension practice as part of the leadership team that oversaw the growth of the middle office.

Prior to joining Cambridge Associates, Ian worked as a Structured Trust Associate at State Street for over three years. In this role, he monitored and reported on various structured financial products such as CLOs and ABS that were custodied at State Street. Prior to that, Ian interned at Rhode Island Housing as a Financial Analyst.

Education and Professional Credentials

- CFA Charterholder
- BS, Finance, Providence College

RICHARD FITZGERALD
CO-FOUNDER & INVESTMENT COMMITTEE MEMBER, CAPITALSPRING



Focus and Experience

Richard is the Co-Founder and a Member of the Investment Committee of CapitalSpring, a \$2.3 billion private debt and equity investment firm based in Nashville. He has over 25 years of experience in the private equity and debt investment business and has had an exclusive focus on investing in the franchises, branded restaurants and other multi-location businesses since founding CapitalSpring in 2005.

Previously, he worked in private equity managing the acquisition and oversight of private businesses across a wide range of industries for Ardshiel and GE Asset Management.

Richard began his career in the investment banking division of CIBC Oppenheimer & Co. in New York.

Education and Professional Credentials

- MBA, Columbia Business School
- BA, Trinity College

Board Affiliations

- Leadership Counsel Chairman, Michael J. Fox Foundation for Parkinson's Research
- Board of Trustees & Endowment Investment Committee Member, Montgomery Bell Academy (Nashville)
- Board of Directors Member, Friends of Warner Parks (Nashville)

DAN VILLALBA
ASSOCIATE, CAPITALSPRING



Focus and Experience

Dan is a member of the investment team and supports the execution of new investment opportunities and monitoring portfolio companies.

Prior to joining CapitalSpring, Dan worked at Kroll Corporate Finance as an investment banking associate, executing middle-market M&A transactions in the broader Consumer & Retail category. Prior to Kroll Corporate Finance, Dan was a deal advisory associate at KPMG within their Financial Due Diligence and Strategy divisions.

Dan holds a BS and MS in Accounting from the Pennsylvania State University. Dan is also a Certified Public Accountant in the state of New York.

JAMES NEVANT
ASSOCIATE, CAPITALSPRING



Focus and Experience

James is a member of the investment team and supports the execution of new investment opportunities and monitoring portfolio companies.

Prior to joining CapitalSpring, James worked in the Asset Management and Investment Banking divisions at Goldman Sachs, focusing on middle-market M&A and financing transactions.

James holds a BBA in Finance from the University of Notre Dame.

GOVAN WHITE
CO-FOUNDER AND PRINCIPAL, COVENANT CAPITAL GROUP



Focus and Experience

Mr. White is co-founder and principal of Covenant Capital Group where he is responsible for managing the corporate activities of the firm, including finance, accounting, investor relations, transaction structuring, and asset management. He is also a member of the Investment Committee

Prior to forming Covenant Capital Group in 2001, Mr. White was a Managing Director with Solidus Company, from 2000 to 2001, where he formulated the investment strategy for the firm's real estate activities in publicly traded REITs and direct investments in apartment communities. From 1995 to 2000, he was a Senior Vice President at AmSouth Bank and predecessor organizations where he was responsible for managing the mortgage portfolio, hedging interest rate risk, securitizing mortgages and selling mortgage servicing. He was a member of the bank's Asset Liability Committee and Investment Committee. From 1989 to 1995, he was employed by Fannie Mae in Washington, D.C., where he was a Senior Business Analyst in the Single-family Division and worked on securitizations and corporate strategy initiatives. Prior to 1989, Mr. White worked in the securities industry as an investment advisor and trader. Mr. White has over 25 years of experience in the financial and real estate industries. His expertise includes all aspects of analysis, identification, evaluation and trading in real estate assets; he has managed the sale and securitization of assets worth over \$3 billion in more than 150 transactions. He is a member of the National Multi Housing Council. He received a Bachelor of Science in Finance from the University of Alabama.

Mr. White is active in the Greater Nashville community. He has served on several nonprofit boards including the Vestry of St. Georges Church, Volunteers of America Middle Tennessee and Rooftops. Currently, he serves on the non-profit governing boards of the Friends of Warner Parks and the St. George's Endowment.

Since 2016, Mr. White has been a member of the United Way of Metro Nashville's Tocqueville Society Alpha Chapter, which is an alliance of community and business leaders addressing the needs of our community's most vulnerable, and in 2018 was also appointed to the Campaign Cabinet of the United Way Community Campaign, which is focused on growing the nonprofit's revenue to help families break the cycle of poverty.

Education Credentials

- BA, University of Alabama

DAN BARBER
CHIEF FINANCIAL OFFICER, COVENANT CAPITAL GROUP



Focus and Experience

Mr. Barber is chief financial officer of Covenant Capital Group where he is responsible for all fund financial operations, reporting for the firm and is the Chief Compliance Officer. Since joining Covenant, Mr. Barber has played a key role in the asset management of a diverse portfolio of real estate investments.

Prior to joining Covenant in 2012 as controller, Mr. Barber was the Accounting and Reporting Manager from 2010 to 2012 with Mars, Incorporated, a global manufacturer of confectionary, pet food, and food products with \$33 billion in annual sales. At Mars, he managed the general accounting and monthly reporting process for a \$700+ million division. From 2007 to 2010, Mr. Barber served as Assistant

Controller for Aldus Capital in Dallas, Texas where he managed the accounting and financial reporting process for the private equity firm with approximately \$6 billion under management. From 2005 to 2007, he was a Senior Auditor for Ernst & Young, LLP in Dallas focusing on healthcare and financial services clients. He holds a Masters of Accountancy from the University of Mississippi and a Bachelor of Business Administration in Accounting from Southern Methodist University. He is a licensed Certified Public Accountant and a member of the American Institute of Certified Public Accountants as well as the Tennessee Society of Certified Public Accountants.

Education and Professional Credentials

- MACC, University of Mississippi
- BA, Southern Methodist University
- Certified Public Accountant (CPA)
- American Institute of Certified Public Accountants (AICPA)
- Tennessee Society of Certified Public Accountants (TSCPA)

JOSEPH MAIETTA
MANAGING DIRECTOR, MACKAY SHIELDS



Focus and Experience

Joseph Maietta is a Managing Director and client portfolio manager on the High Yield Team. Prior to joining MacKay Shields in 2014, he was a member of the the Institutional Client Management Group at PIMCO and was previously worked in the Investment Analytics and Consulting area at JPMorgan Chase & Co.

He earned a B.S. in Finance from Hofstra University Honors College and holds a dual M.S. in Global Finance from New York University's Leonard N. Stern School of Business and Hong Kong University of Science and Technology.

He is a CFA Charterholder and has been in the investment management industry since 2008.

HEATHER WOLF, CFA
PORTFOLIO MANAGER, PARAMETRIC PORTFOLIO ASSOCIATES



Focus and Experience

Heather leads a team of investment professionals responsible for designing, trading, and managing overlay portfolios. Prior to joining Parametric full-time in 2016, Heather was an investment analyst intern at Parametric.

She earned a BA in religion and economics with an emphasis in finance from St. Olaf College. A CFA charterholder, Heather is a member of the CFA Society of Minnesota.

JASON CHALMERS

EXECUTIVE DIRECTOR, CLIENT RELATIONSHIP MANAGEMENT, PARAMETRIC PORTFOLIO ASSOCIATES



Focus and Experience

Jason is based in Boston and is responsible for managing client relationships throughout the eastern United States. Prior to joining Parametric in 2014, Jason was a vice president and relationship manager at Acadian Asset Management.

He earned a BS in economics at Northeastern University and an MS in finance at Boston College Carroll School of Management.