

BUILDING HEALTHIER ECONOMIES WITH CDFIs

Speaker Biographies



Tim Berry is head of global government relations at JPMorgan Chase, managing all government relations and public policy functions. He is responsible for partnering with business leaders to shape the financial services and business policy agenda in all JPMorgan Chase's global markets. He also focuses on leveraging market expertise and intellectual capital on economic trends, work in cities around workforce and small business, and the data of the JPMorgan Chase Institute to help drive and support public policies that are good for the financial industry and the country. Berry has tremendous experience in the public and private sectors. He spent nearly 20 years in government service, including as chief of staff to two majority leaders of the US House of Representatives, managing large teams, and developing policy and legislative agendas for the House Republican Conference. He has excellent relationships across the aisle on Capitol Hill and is considered one of the best political and legislative strategists in Washington, DC. Berry also spent five years in the private sector as vice president for government relations at Time Warner and as executive vice president of Axios, a new media company. Berry holds a BA in history from Middlebury College.



Colleen Briggs is executive director of community innovation within the Office of Corporate Responsibility at JPMorgan Chase & Co., a global leader in corporate philanthropy with \$200 million invested in communities annually. She is responsible for helping establish and execute the firm's global philanthropic strategies on financial health and community development, including two signature initiatives: the Financial Solutions Lab and PRO Neighborhoods competition. Briggs also manages programs across topics designed to surface new approaches to community challenges and explore global cross-cutting themes across the foundation's work, such as women's empowerment, peer learning, evaluation, and attracting additional investment in projects. Briggs was previously the economic policy adviser to Senator Debbie Stabenow. Briggs managed the senator's economic portfolio, including policy related to financial services, taxes, small business, job creation, community development, manufacturing, and housing. Briggs managed the Dodd-Frank market reforms for the Senate Agriculture Committee and helped draft the Recovery Act, the Troubled Asset Relief Program, the Dodd-Frank Act, and health care reform. Briggs is a member of the Asset Funders Network Steering Committee and the Innovations for Poverty Action Policy Advisory Group. She earned a BA from the University of North Carolina at Chapel Hill and an MBA from the Yale School of Management.



Alice Carr is head of community development banking at JPMorgan Chase, a national real estate business that lends to and invests in community and economic development projects in underserved markets. Carr's team finances the construction and rehabilitation of housing affordable to low-income families and seniors in more than 80 cities. The team also facilitates investments in economic development projects, such as building charter schools, health care clinics, and food grocers. Carr has over two decades of finance experience. Before joining JPMorgan Chase, she was a managing director and western regional director for Citi Community Capital, where she managed a group that originated construction, permanent, and gap financing for residential, commercial, and mixed-use community development properties. Before her time at Citigroup, Carr worked at the Low Income Investment Fund in San Francisco. Carr serves on several boards and committees, including as chair of the Southern California Leadership Council for Enterprise Partners, chair of the board of directors for California Community Reinvestment Corporation, and treasurer of the board of directors for the Los Angeles Conservancy. Carr earned a BA from Occidental College, graduating cum laude and Phi Beta Kappa and receiving honors and distinction in American studies and German literature. She also holds an MA from the University of California, Los Angeles, in urban planning, with a concentration on housing finance and community development.



David Clunie is head of state and local government relations for JPMorgan Chase & Co., responsible for leading the firm's political activities in states and municipalities nationwide and management of eight regional state and local government relations managers. He joined the firm in 2015 as deputy head of state and local government relations. Clunie is also secretary for the public responsibility committee of the firm's board of directors. Before joining JPMorgan Chase, Clunie was executive secretary of the US Treasury. As an appointee of President Obama, Clunie ran the "nerve center" of the department. He was a member of Secretary Jack Lew's senior staff, primarily responsible for quality control and proper policy coordination of all work streams and documents associated with the secretary. From 2010 to 2012, Clunie was deputy associate counsel at the White House. He was

also a senior member of the legal team for the State of Iowa on President Obama's 2008 campaign. Before joining the Obama administration, Clunie was a litigation associate at Paul, Weiss, Rifkind, Wharton & Garrison. He also clerked for the Honorable Cynthia M. Rufe in the US District Court for the Eastern District of Pennsylvania. Clunie received a BA with honors from the State University of New York at Albany and received a JD from the Howard University School of Law, where he was editor in chief of the law review.



Grace Fricks founded Access to Capital for Entrepreneurs Inc. (ACE), a Georgia nonprofit organization that helps underserved business owners start or expand their businesses through capital, coaching, and connections. ACE has provided more than \$45 million in loans, assisting more than 765 small businesses, and helped create or retain 6,700 jobs for Georgians. Fricks was honored as a Vision of Excellence Award winner by the Atlanta Business League. In 2016, Fricks was recognized as one of *Bizwomen's* 100 Women to Watch and a Women Who Mean Business Honoree by *Atlanta Business Chronicle*. She was named one of the 100 Most Influential Georgians by *Georgia Trend Magazine* and the US Small Business Administration Georgia District Financial Services Champion of the Year in 2014. Fricks serves on the advisory board for the City of Atlanta's Women's Entrepreneurship Initiative, the board of directors of Appalachian Community Capital, and Invest

Atlanta's New Market Tax Credit board. She is a past member of the board of directors of the Association for Enterprise Opportunity. Fricks, a small business owner for more than 15 years, is also a former board member of the National Association of Women Business Owners, Atlanta chapter. Her undergraduate degree is in social work from the University of Tennessee at Martin, and her master's degree in business administration is from the University of Memphis.



Calvin L. Holmes is president of Chicago Community Loan Fund, a nonprofit, certified community development financial institution that provides responsible financing and technical assistance for community stabilization and development efforts that benefit low- and moderate-income neighborhoods throughout metropolitan Chicago. Under his leadership, the fund's lending is leveraging nearly 7,500 housing units, nearly 2,500 jobs, and \$1.1 billion in additional capital in over 60 low-wealth Chicagoland communities. Holmes's community development career spans 30 years, including work as a budget planner for a \$140 million rapid-transit project and as property manager of a 200-unit assisted housing portfolio. He is chairman of the Community Development Advisory Board; Bank of America National Community Advisory Council; Kroger Community Development Entity; PNC Bank Advisory Board; and the Great Lakes Region Sustainability Funds. He serves on the boards of the Cook County Land Bank Authority, Chicago Community Land Trust, South Suburban

Land Bank and Development Authority, and the Interfaith Housing Development Corporation of Chicago. He is a 2003 Leadership Greater Chicago fellow and led the Chicago Community Loan Fund to a 2009 MacArthur Foundation Award for Creative and Effective Institutions. Holmes is a recognized expert in community development finance and issues involving access to capital. He holds a bachelor's degree in African American studies from Northwestern University and a master's degree in urban and regional planning, with a concentration in real estate finance, from Cornell University.



Congressman Dan Kildee is the representative of Michigan's Fifth Congressional District. He serves in various leadership positions. Congressman Kildee is the vice ranking member of the House Financial Services Committee. Before being elected to Congress, Congressman Kildee cofounded and was president of the Center for Community Progress, a national nonprofit organization focused on urban land reform and revitalization. Previously, Congressman Dan Kildee served as the Genesee County Treasurer, on the Genesee County board of commissioners, and on the Flint Board of Education. Additionally, he worked for eight years at the Whaley Children's Center, a residential treatment facility in Flint for children who have experienced trauma and abuse.



Kipp Kranbuhl is deputy assistant secretary for small business, community development, and affordable housing policy at the US Treasury. Before joining Treasury, he worked for Gladstone Investment Corporation and Petra Capital Partners, investing private equity and debt capital in, and serving on the boards of, companies across several industries, including light and specialty manufacturing, health care services, consumer and industrial products and services, aerospace and defense, and business services. Kranbuhl has also worked for the Overseas Private Investment Corporation, Wheat First Butcher Singer/First Union Securities, and the Bank of New York. He holds a BA from Duke University and an MBA from the University of Michigan.



Rob Nichols is president and CEO of the American Bankers Association, which represents banks and charters and is the voice for the nation's \$17 trillion banking industry. Nichols joined following 10 years at the helm of the Financial Services Forum, a nonpartisan financial and economic policy organization. Before joining the forum, Nichols was assistant secretary of the Treasury for Public Affairs, a position requiring confirmation by the US Senate. Nichols's career highlights include service as communications director for the Electronic Industries Alliance; communications director to US Senator Slade Gorton and press secretary to Congresswoman Jennifer Dunn; and in the West Wing as an aide in the Office of the Chief of Staff in the George H. W. Bush administration. Nichols is a recipient of the Alexander Hamilton Award, the highest honor of the US Treasury. He also is consistently ranked as one of Washington's Top Lobbyists by the *Hill* and was recently described as one of the "new generation of trade group CEOs" by the *Washington Post*. Nichols is a graduate of the George Washington University. He is vice chair of the board of directors of Food Allergy Research and Education, which works on behalf of the 15 million Americans with food allergies, including all those at risk for life-threatening anaphylaxis.



Mary Landrieu started her career in public service in 1979, when she was elected to the Louisiana state legislature. For eight years, she championed causes related to women and children, flood protection, and education reform. In 1987, she was elected state treasurer and served with distinction for two terms. Strong fiscal management, pension fund diversification, debt limitation, and the creation of the first municipal investment fund, now valued at over \$2 billion, are some of her noteworthy accomplishments. She was elected to the US Senate in 1996 and became the first woman from Louisiana elected to serve a full term. As a member of the Armed Services Committee and the Appropriations Committee, chairman of the Small Business Committee, and chairman of the Energy and Natural Resources Committee, she became a tireless advocate for her home state. She led the 112th Congress to pass the Small Business Jobs Act of 2010. Other notable accomplishments were the passage of the landmark Gulf of Mexico Energy Security Act, the Israel American Energy Alliance, and the RESTORE Act, the largest one-term environmental investment in the Gulf Coast.



Noel Andrés Poyo is executive director of the National Association for Latino Community Asset Builders (NALCAB). He represents and serves a diverse national network of over 100 Latino-led community and economic development organizations in 32 states and the District of Columbia. He advocates nationally on behalf of the NALCAB membership and low-income Latino communities. He is a national leader in the community development and asset-building industry. His career has focused on issues integrating low-income people and immigrants into mainstream financial services and real estate sectors of the economy. He was recently appointed to the Federal Reserve Board Community Advisory Council and the BBVA Compass Community Advisory Board.



Kevin Smith is president and CEO of Community Ventures Corporation, a nonprofit community development organization serving residents and communities throughout Kentucky. Since 1993, Smith has led Community Ventures Corporation from a 1-person staff with \$450,000 in assets to today's 61-member team in six regional offices managing over \$230 million in assets. During Smith's tenure, the corporation has received more than \$110 million in private and public investments for nonprofit programs and an additional \$200 million in New Market Tax Credit investments in Kentucky's economically disadvantaged communities.



Congressman Scott Tipton is the representative of Colorado's Third Congressional District. After three decades of running his small business, Congressman Tipton was elected to the Colorado House of Representatives for the 58th District in 2008. He was first elected to the US House of Representatives in 2010. He serves on the House Financial Services Committee on Financial Services and House Natural Resources Committee. He is cochairman of the Congressional Small Business Caucus and vice chair of the Congressional Western Caucus. Throughout his time as a US representative, the Congressman's priority has been to advance policies that grow jobs, support the economy, and keep Colorado's families safe and secure.



Brett Theodos is a senior research associate in the Metropolitan Housing and Communities Policy Center at the Urban Institute. His expertise is in program evaluation and performance measurement of interventions supporting vulnerable communities and families, focusing on economic and community development, neighborhood change, affordable housing, and financial services. Examples of his economic and community development research include evaluations of the New Markets Tax Credit program, four Small Business Administration loan and investment programs, the US Department of Housing and Urban Development's Section 108 program, and the department's Strong Cities, Strong Communities National Resource Network. He is researching community development capital flows into Baltimore and Detroit, and looking nationally at CDFI lending. He has led randomized control trial evaluations of financial coaching and of rules of thumb in financial decisionmaking, and has also completed several studies of shared equity homeownership programs. Mr. Theodos also works to increase nonprofit capacity in evaluation and performance measurement. He co-directs Measure4Change, an initiative sponsored by the World Bank, which provides technical assistance to local nonprofits.



Sarah Rosen Wartell became president of the Urban Institute in 2012 and is the third president since Urban was founded in 1968. During her tenure, Urban has articulated its strategy to "elevate the debate" by bringing more of its research insights to federal, state, and local government and practice; becoming a leader in research communications and data visualization; and undertaking an ambitious program of business systems and technology modernization. Previously, Wartell was deputy assistant to the president for economic policy and deputy director of the National Economic Council. At the US Department of Housing and Urban Development from 1993 to 1998, she advised the federal housing commissioner on housing finance, mortgage markets, and consumer protection. After government service, Wartell was the founding chief operating officer and then executive vice president of the Center for American Progress. Her work focused on the economy and housing markets, and she directed the Mortgage Finance Working Group and "Doing What Works" government performance program. Before her tenure in government, she practiced law with the Washington, DC, firm Arnold & Porter. Wartell has an AB degree with honors in urban affairs from Princeton University's Woodrow Wilson School of Public and International Affairs. She has a JD degree from Yale Law School.