Ric Andersen
Partner, Peak Equity

Board Experience
Image API
EnterpriseDB
Vertex
G5
American Public Education
Barra Foundation

Ric Andersen joined PeakEquity Partners as a Partner in 2015. Ric leverages over 30 years of business leadership, value creation, and investing in industry, management consulting and private equity. Ric spent five years at Milestone where he helped to implement a robust value creation and portfolio management program and more recently led their software and technology enabled services investing practice. Ric continues to serve on the boards of Image API and EnterpriseDB. Prior to Milestone, Ric spent five years at Silver Lake Partners where he was hired to build and co-lead their value creation team. At Silver Lake, Ric was engaged in many of the firm's investments and portfolio companies and sat on the boards of Sabre and Avaya.

During his tenure with Price Waterhouse, PwC Consulting, and IBM, Ric was a senior partner who built and managed enterprise software/ERP businesses, as well as business process outsourcing operations. He spent much of his early career leading large-scale enterprise software and business process improvement programs for Fortune 500 companies across a variety of industries. While at PwC Consulting, Ric played a central role in planning for and executing the sale of the PwC Consulting business to IBM in 2002 as well as the post-deal integration activities.

Ric is an independent director of Vertex, a large, privately held enterprise software company, as well as American Public Education Inc., a publicly traded, fully accredited online university. Ric is also Chairman of the Board of G5, a PeakEquity investment. He also serves on the board of the Barra Foundation, a large charitable foundation.

Ric is a member of the American Institute of Certified Public Accountants. He holds an M.B.A. from the Wharton School at the University of Pennsylvania and a B.S. from Bucknell University.

Patricia Connolly

Executive Director, Center for Corporate Governance

Drexel University LeBow College of Business

Board Experience

Shore Medical Center
Shore Memorial Health Systems
Chestnut Hill College
PNC Bank, Women's Financial Services Network Advisory Board

Patricia Q. Connolly is an executive with notable success guiding discussions on how to lead and govern in the 21st century. While supporting and contributing to multiple Boards of Directors, she has brought energy and transparency to the task of corporate governance.

Ms. Connolly's background is a rare blend of corporate and nonprofit leadership. During her early career, she advanced through a series of positions at financial services firm PNC Financial Corp. This culminated with her role as Vice President for the firm's retail and private banking group. Here, she gained a firm grasp of the various principles that underpin the corporate world.

Ms. Connolly then applied her business acumen to the nonprofit sector, holding executive roles at prominent institutions such as the Philadelphia Museum of Art. She was able to infuse nonprofit operations with a new efficiency and cost-effectiveness that streamlined processes and positioned long-term success. Her contributions during this period included driving a 60% increase in annual donations to the country's oldest natural history museum.

Since 2008, Ms. Connolly has served as Executive Director for Drexel University's Center for Corporate Governance. Although situated in the academic arena, she has been heavily involved with the for-profit sector while consulting various Boards of Directors. She established two new flagship programs that have strengthened the discourse and education on new corporate governance areas. Ms. Connolly is also presently engaged as Chairman of the Nominating & Governance Committee for a 1500-employee, 370-physician medical center.

Through her varied record of experience, Ms. Connolly has gained unique perspective on the critical role that a Board of Directors has in steering an organization to success. Regarded as an influential thought leader, she enjoys the chance to guide companies through pivotal decisions and periods of major change.

Ellen Harvey, CFA

Managing Director, Miller Investment Management
Principal, Lindsay Criswell, LLC

Board Experience

Owosso Corp
Main Line Health System
Baldwin School
Academy of Natural Sciences of Drexel University
Princeton University
Jefferson Health System
Aetos Funds
Cutwater Select Income Fund

Ellen Harvey is a managing director of Miller Investment Management and a Principal of Lindsay Criswell LLC, working with high net worth clients. Previously, she worked with Vanguard, Mercantile Bankshares, and Brown Investment Advisory and Trust, following sixteen years with Miller Anderson & Sherrerd and Morgan Stanley. She started her career at the Board of Governors of the Federal Reserve System, followed by a year at the US Department of the Treasury. She spent four years at JP Morgan before moving to Miller Anderson & Sherrerd. Ellen has served in a variety of board roles ranging from publicly-listed entities to major health care providers, and as well served as a Trustee of Princeton University.

Coming from a background in fixed income, Ellen has focused most recently on advising clients on their asset allocation. During her career she has taken on a variety of responsibilities from managing bond portfolios to overseeing investment teams to managing mutual fund and hedge fund selection for client investment.

Ms. Harvey is a CFA charterholder. She earned a BA in Economics from Princeton University and an MA in Economics from George Washington University.

Christine James, CFA

Managing Director, Wells Fargo Asset Management

Board Experience

Morris Arboretum of University of Pennsylvania
Dean's Advisory Council at Villanova School of Business
Rutgers Business School Neward and New Brunswick
Lacordaire Academy
Summer Search

Christine James, CFA serves as a Managing Director and practice leader of sub-advisory client relations at Wells Fargo Asset Management. She joined Wells Fargo from Evergreen Investments, where she served as chief operating officer of domestic fixed income. Christine also led business management activities for fixed income across Evergreen and was senior portfolio specialist and domestic liaison for global fixed income. Prior to that, she managed fixed income portfolios. Christine has been with Wells Fargo Asset Management or an affiliate firm since 1991, when she began her investment industry career. Christine earned a B.S.B.A in Finance with a minor in Political Science and an M.B.A. from Villanova University. She has earned the right to use the Chartered Financial Analyst designation.

She is actively involved in her community, currently serving on the Board of Advisory Managers of the Morris Arboretum of the University of Pennsylvania, the Dean's Advisory Council at Villanova School of Business, and the Financial Advisory Board of Rutgers Business School Newark and New Brunswick. Christine is also chair of the Board of Trustees of Lacordaire Academy, Upper Montclair, NJ. Additionally, she most recently served on the national Board of Directors of Summer Search, as well as on the board of its affiliate Summer Search Philadelphia and their finance committee. Christine was formerly on the board of the CFA Society of Philadelphia and served on the finance committee of Mother of Divine Providence Church, King of Prussia, PA.

Jeremy Tennenbaum, CFA

Chief Financial Officer, Altman Foundation

Board Experience

CFA Society of Philadelphia
Economy League of Greater Philadelphia
Main Line Health System
Pennsylvania Horticultural Society
North American Advisory Board, MIT's Sloan School of Management
Audit Committee, American Friends Service Committee

Jeremy Tennenbaum, CFA, is the Chief Financial Officer of the Altman Foundation, whose mission is to improve the quality of life in New York City through engaged grant-making focused on measurable results. Since 1913 the Foundation has invested hundreds of millions of dollars in the five boroughs and has an enviable reputation for high quality and high impact grant-making.

Before Altman, he was CEO of Spouting Rock Consulting, an investment consulting firm outside Philadelphia focused on providing advice and diligence services to ultra-high net worth families. Prior to Spouting Rock, Jeremy was for five years the Chief Investment Officer of the Arlon Group (the family office for Continental Grain) and, for four years prior to that, Executive Vice President for business development and strategic planning for Seagate Technology in Scotts Valley, California. He spent a decade at Wellington Management (where he served as global automotive and capital goods analyst and portfolio manager), after having spent the early part of his career at Salomon Brothers, first as an equity analyst and later as an investment banker.

Jeremy holds a bachelor's degree in politics from Princeton University and an S.M. in Management (Finance) from MIT's Sloan School of Management. He is an experienced non-profit board member and an active participant in professional organizations in his field, serving as a director of the CFA Society of Philadelphia and the Economy League of Greater Philadelphia, on investment committees for Main Line Health, the Pennsylvania Horticultural Society, and two private foundations, on the North American Advisory Board for MIT's Sloan School of Management, and was recently appointed to the audit committee for the American Friends Service Committee.

Nancy Wolcott

Retired Financial Services Executive

Board Experience

FundVantage Series Trust
BNY Mellon International Bank Ltd (Ireland)
BNY Mellon Investment Servicing (US) Inc
BNY Mellon Investment Servicing Trust Company
PNC Global Investment Servicing
YMCA of Philadelphia
Mann Center for the Performing Arts
Bryn Mawr Presbyterian Church Foundation

Nancy Wolcott is a recently retired financial services executive with global experience in complex regulatory environments, P&L management, M&A, and asset servicing for asset managers, broker dealers, banks and corporations.

Nancy retired from BNY Mellon, which acquired PNC Global Investment Servicing, Inc., where Nancy had served as President and Chief Operating Officer. Prior to managing this mutual fund servicing business, Nancy managed trust and investment advisory services for PNC's wealth management business.

Nancy joined PNC from Harris Bank (now BMO Harris) in Chicago, where she held a variety of positions, the last of which was head of the Corporate and Institutional Trust Department.

Nancy has served and continues to serve in a variety of board roles, both corporate and not-for-profit. She believes passionately in the importance of being intentional about how each day is spent, ensuring that time is devoted to family, community and intellectual curiosity.

She earned a BA in Economics from Wellesley College and an MBA from University of Chicago's Graduate School of Business (Booth).