Investment Committee 2018

The Austin Community Foundation and its fund holders are fortunate to work with an experienced team of professionals to achieve asset growth through sound investment of endowed and quasi-endowed assets. The Foundation's investment manager, **DiMeo Schneider & Associates, L.L.C.**, is a leading investment management and consulting firm based in Chicago, managing and advising on over $40 billion in assets.

Investment Committee Members:

David Martin is currently serving on the board of Northern Funds and Northern Institutional Funds (Northern Trust) and is a lecturer at the University of Texas. He was Chief Financial Officer at Dimensional Fund Advisors from March 2007 until April 2016. In addition to finance and accounting (for both funds and advisor), he was responsible for compliance, real estate/facilities and a project management office, and he also served on numerous internal boards. Prior, he was Chief Financial Officer at Janus Capital Group from 2005 until 2007. Mr. Martin oversaw finance & accounting, human resources, IT, real estate and procurement for Janus Capital Management, which administers mutual funds and separate accounts in retail and intermediary markets. Previously, Mr. Martin was at Charles Schwab & Co., Inc., where he served in senior management positions across a variety of financial and business disciplines. While senior vice president and treasurer, he was responsible for all traditional treasury functions, including capital management, banking relationships, and cash and portfolio management. As senior vice president of planning and analysis, he oversaw planning, forecasting, and reporting. He was also responsible for financial oversight of the firm''s support functions (such as IT and operations) where he provided analysis and planning to determine effectiveness of the firm''s multi-million-dollar marketing budget. Earlier in his career, Mr. Martin was executive vice president and chief financial officer for First Interstate Bank of Texas. Mr. Martin obtained his masters of business administration degree from Carnegie Mellon University with a concentration in finance. He also has a bachelor of science degree in mathematical sciences from Stanford University, where he was elected to Phi Beta Kappa. Mr. Martin served on the Board of the Austin Chamber of Commerce for five years.

Hal Peterson is a Managing Principal of Castle Hill Advisors, providing financial advising for endowments, foundations, family offices, and successful entrepreneurs. Hal co-founded Durbin Bennett Peterson Private Wealth Management, LLP which managed over $700 million in assets. Hal serves on the Master of Science in Finance Advisory Council of the McCombs School of Business at the University of Texas at Austin, mentoring graduate finance students. He also is a Member, Investment Committee for the Board of Trustees and Executive Committee of The Seton Fund and Chair, Endowment Committee and Member, Finance Committee at Tarrytown United Methodist Church. Hal is the chair of the Foundation's Board of Governors.

Sara Seely, CFA is a principal at Equistar Wealth Management. Previously, Sara was senior advisor at Durbin Bennett Peterson Private Wealth Management and a founding member and director of research at WaterStreet Investment Consultants, an institutional investment consulting firm managing over $2 billion. At WaterStreet, she led the firm's Investment Committee responsible for investment manager due diligence and capital markets research. Sara was recognized as "Five Star Wealth Manager – Best in Client Satisfaction" by *Texas Monthly*. She serves on the Investment Committee for Hospice Austin and the Development Council for SafePlace and is a member of the Women's Fund of Central Texas.

Venu Shamapant is a co-founder of LiveOak Venture Partners and a founding member of Austin Speech Labs. Prior to LiveOak, Venu was a General Partner at Austin Ventures where he invested in companies producing more than $1 billion in exit values to date. Additionally, Venu has worked with McKinsey & Co. serving clients in the enterprise systems and software markets. He started his professional career as a software developer and engineering lead at Mentor Graphics. Venu received his MBA from the Harvard Graduate School of Business, MS in Computer Engineering from the University of Texas at Austin, and a BS in Electronics and Communications Engineering from Osmania University, India.

Glenn Stotts is the Deputy CIO and a Managing Director at Meritage Capital. Prior to joining Meritage, Glenn served as an Associate with The University of Texas Investment Management Company, Strategy Analyst for Merrill Lynch, and Senior Associate at Mainspring (acquired by IBM). He serves on the Endowment Committee of Tarrytown United Methodist Church and on the Alumni Admission Council for Northwestern University. He received a BA in Economics and International Studies from Northwestern University and an MBA in Finance from The University of Texas at Austin and holds the Chartered Alternative Investment Analyst (CAIA) designation.

Drew Tate
Drew Tate has been an investor at Vista Equity Partners since 2009. Headquartered in Austin, Vista invests in software, data, and technology companies led by world-class management teams with a long-term perspective. Prior to Vista, Drew was an Investment Banker at Robert W. Baird & Co. in Chicago. Drew graduated from the University of Colorado in 2007 with a degree in Finance. Drew and his wife are native Austinites and keep themselves very busy raising their twin daughters.

Mark Warner serves as Managing Director of Natural Resource Investments for the University of Texas Investment Management Company (UTIMCO), which manages the $27 billion University of Texas endowments and associated funds. In addition, Mark chairs the firm's Emerging Markets Task Force and is a member of the Investment and Senior Management Committees. In his role he is responsible for all private equity, hedge fund, public equity and commodity futures investments across a broad range of natural resources and infrastructure globally.