

Morgan Stanley



# Exchange 2023: Transformational Philanthropy

WEDNESDAY, MARCH 8, 2023, 1:00 – 7:30 P.M.  
THE BASS MUSEUM OF ART | MIAMI BEACH, FLORIDA

*"A life without a cause is a life without effect." — Paulo Coelho*

Fellow Changemakers,

Welcome to Exchange 2023: Transformational Philanthropy!

We are so grateful that you could join us. Today, as we gather in person for the first time in three years, we look firmly forward in our exploration of a rewired social, cultural and philanthropic landscape.

Our intention with today's program in this iconic contemporary art museum is to encourage, inspire and connect you with others who are also seeking to hone their philanthropic craft and create lasting impact. We invite you to explore, challenge and share with your exceptional peers and talented speakers gathered here today as we collectively engage in the art of philanthropy.

On behalf of Morgan Stanley, we welcome you and are inspired by you.



**MELANIE SCHNOLL BEGUN**

*Head of Family Office Resources Field Engagement*

*President of Morgan Stanley Global Impact Funding Trust (MS GIFT)*

*Morgan Stanley*

## Agenda

1:00 p.m. – 1:30 p.m.

### Check-In and Registration

1:30 p.m. – 1:40 p.m.

### Bienvenidos a Miami: Exchange 2023

**Melanie Schnoll Begun**, *Head of Family Office Resources Field Engagement, President of Morgan Stanley Global Impact Funding Trust (MS GIFT), Morgan Stanley*

**Liz Dennis**, *Head of Private Wealth Management, Morgan Stanley*

1:40 p.m. – 2:20 p.m.

### The Purposeful Entrepreneur

**Jim Chu**, *Founder and Chief Executive Officer, Untapped Global*

**Dominic Kalms**, *Founder and Chief Executive Officer, B Generous*

**Zia Khan**, *Senior Vice President for Innovation, The Rockefeller Foundation*

**Melissa Medina**, *President and founding team member, eMerge Americas and member of The Miami Foundation Board of Trustees*

**Susan Reid**, *Global Head of Talent, Morgan Stanley*

What happens when an entrepreneur sets out to solve a problem through their product or service? What if the intention of scaling the company is to solve a social or environmental problem — at scale?

Leading social entrepreneurs will explore their simultaneous pursuit of economic and philanthropic objectives in this forward-looking discussion of impact-first entrepreneurship.

2:20 p.m. – 3:00 p.m.

### Winning the Race to Net Zero

**Chad Bolick**, *Head of Philanthropy Management, Morgan Stanley*

**Abdul Dosunmu**, *Climate Funders Justice Pledge Campaign Manager, Donors of Color Network*

**Randall Kempner**, *Senior Advisor to the Energy and Environment Program, The Aspen Institute*

**Dawn Lippert**, *Founder and Chief Executive Officer, Elemental Excelsior*

**Daniel R. Porterfield**, *President and Chief Executive Officer, The Aspen Institute*

Without precedent in human history, the climate crisis continues to unfold with increasingly catastrophic effect. While increasing in recent years, climate-focused philanthropy remains small in comparison to the size of the challenge, and climate-focused investment is minuscule given the opportunity. Recent insight on philanthropy and investment trends via Morgan Stanley's joint research with The Aspen Institute on *Funding Climate Action* will guide the conversation. We will explore how to shift from analysis paralysis to funding climate now.

- 3:00 p.m.–3:20 p.m. **Bigger Than the Big Screen: A Moment with Matt Damon**  
**Vedika Bhandarkar**, *Chief Operating Officer, Water.org*  
**Matt Damon**, *Actor, Co-Founder, Water.org and WaterEquity*  
**Randall Kempner**, *Senior Advisor to the Energy and Environment Program, The Aspen Institute*  
Join us for a memorable vignette with special guest Matt Damon. Matt will join us via Zoom to discuss the water crisis, how it is being compounded by climate change, and Water.org's model to address the crisis and enlist wider support and advocacy.
- 3:20 p.m.–3:30 p.m. **Networking Break**
- 3:30 p.m.–4:05 p.m. **Superwomen! | Philanthropy Honors Legacy**  
**Shannon Abloh**, *President, The Virgil Abloh Foundation*  
**Liz Dennis**, *Head of Private Wealth Management, Morgan Stanley*  
**Sophie Grayer**, *Chief Giving Officer, The Grayer Family Foundation*  
As the rising generation assumes increasingly greater board leadership responsibilities across family foundation and nonprofit boards alike, philanthropy as a means of transferring family values is a hot topic.  
Liz Dennis will lead an inspiring conversation to explore the navigation of opportunities, responsibilities and challenges of honoring legacy through philanthropy while charting your own course.
- 4:05 p.m.–4:45 p.m. **Giving It All Away**  
**Francine A. LeFrak**, *Giving Pledge Signatory, President, Francine A. LeFrak Foundation & the Same Sky Foundation Fund, and Founder, Same Sky*  
**Susan Mac Cormac**, *Partner, Morrison & Foerster LLP*  
**Elizabeth Ramirez**, *Partner, Winding River Advisors (former Director, Walton Personal Philanthropy Group)*  
How much is enough when it comes to giving? What tool(s) do you need? Whether compelled by The Giving Pledge, family dynamics, faith or wider ethical considerations, families of great wealth are giving away their fortunes with increasing frequency and vigor.  
Elizabeth Ramirez will facilitate an intimate conversation on the motivations, intentions and considerations behind wealth as a means to an end beyond acquisition itself.
- 4:45 p.m.–5:00 p.m. **Networking Break**

5:00 p.m.–5:35 p.m.

### Join the Club

**Rena Greifinger**, *Managing Director, Maverick Collective*

**Darren Isom**, *Partner, The Bridgespan Group*

**Maggie Neilson**, *Chief Marketing Officer, The Philanthropy Workshop*

In this masterclass, guests will learn from leaders of some of the globe's most important peer-philanthropy networks. In addition to providing concrete examples from their illustrious careers in philanthropy, panelists will dive deep into the power of peer learning and collaborative grantmaking to optimize impact.

5:35 p.m.–6:15 p.m.

### Fountain of Youth

**Dr. Jaclyn Albin**, *Director of the Culinary Medicine Program, UT Southwestern Medical Center*

**David Bokman**, *Head of Family Office Resources, Morgan Stanley*

**Dr. Kim Henderson**, *Head of Wealth Management Health and Wellness Education, Morgan Stanley*

**Melanie Schnoll Begun**, *Head of Family Office Resources Field Engagement, President of Morgan Stanley Global Impact Funding Trust (MS GIFT), Morgan Stanley*

Whether brought on by stress, poverty, addiction or wider circumstances, life expectancy in the United States started a downward decline in 2020 – the first time since the 1920s.

A distinguished panel of physicians and nonprofit leaders will discuss health and well-being toward societal healing through a holistic lens. Gain a deeper understanding of culinary and lifestyle medicine, the impact of nutrition, exercise, sleep and stress management on physical and mental health, and how philanthropy can advance prevention, treatment, and cures.

6:15 p.m.

### Brief Closing Note

**Melanie Schnoll Begun**, *Head of Family Office Resources Field Engagement, President of Morgan Stanley Global Impact Funding Trust (MS GIFT), Morgan Stanley*

**Chad Bolick**, *Head of Philanthropy Management, Morgan Stanley*

6:30 p.m.–7:30 p.m.

### Cocktail Reception & Private Museum Viewing

*Featuring a performance from Guitars Over Guns*

*Introduction by Co-Founder Bob Bernstein*

Guitars Over Guns offers students from our most vulnerable communities a powerful combination of music education and mentorship with professional musicians to help them overcome hardship, find their voice and reach their potential as tomorrow's leaders. For the past 15 years, Guitars Over Guns has served more than 8,000 students in Miami, Chicago and L.A.



Photography by World Red Eye. Image courtesy of The Bass, Miami Beach.

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