

A person in silhouette stands looking at a large projection of a snowy mountain range. The person is wearing a dark cap and a long-sleeved shirt. The background is a vast, bright blue sky with a few wispy clouds. The mountains are covered in snow and have some reddish-brown patches. The person is standing on a dark surface, possibly a stage or a large screen.

Morgan Stanley

Exchange 2024: Imagine the Possibilities

TUESDAY, JUNE 25, 2024, 1:00 P.M. – 7:30 P.M.
ASIA SOCIETY & MUSEUM | NEW YORK, NY

Fellow Changemakers,

Welcome to Exchange 2024: Imagine the Possibilities. We are thrilled that you are joining us for this annual convening of distinguished philanthropists, advocates and innovators.

Exchange was established eight years ago as a forum for sharing ideas and expanding connections between highly accomplished leaders across sectors. We encourage you to share your stories, strategies and accomplishments with your fellow attendees, and explore opportunities to amplify your impact through new approaches and collaborations.

On behalf of Morgan Stanley and your Advisors, we welcome you and appreciate your dedication to creating meaningful change. Imagine the possibilities.

In gratitude,

Melanie Schnoll Begun and Morgan Grunat
Co-Chairs, Exchange 2024



MELANIE SCHNOLL BEGUN

*Head, Philanthropy Management and Family Office Resources Field Engagement,
Morgan Stanley; President, Morgan Stanley Global Impact Funding Trust*



MORGAN GRUNAT

Philanthropic Advisor, Morgan Stanley

Agenda

1:00 p.m. – 1:30 p.m. **Check-In & Registration**

1:30 p.m. – 1:40 p.m. **Welcome Remarks**

Melanie Schnoll Begun, Head, Philanthropy Management and Family Office Resources Field Engagement, Morgan Stanley

President, Morgan Stanley Global Impact Funding Trust

Morgan Grunat, Philanthropic Advisor, Morgan Stanley

1:40 p.m. – 2:05 p.m. **The Science of Storytelling**

Audrey Choi, Visiting Scholar, The Federal Reserve Bank of New York

Dave Isay, Founder & President, StoryCorps

For both philanthropists and nonprofit organizations, storytelling is key to fostering connection and understanding. Within all of us, there are stories that influence our worldview and our relationship with the causes closest to us. This fireside chat will set the stage for our conference by exploring the importance and power of storytelling as a tool for advocacy, reflection and building legacy.

2:05 p.m. – 2:45 p.m. **Leaders Leading Leaders**

Claire Babineaux-Fontenot, CEO, Feeding America

Liz Dennis, Head of Private Wealth Management, Morgan Stanley

Jed Finn, Head of Wealth Management, Morgan Stanley

Wesner Pierre, CEO, Partnership with Children

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

What does it mean to be an exemplary board leader? What do leaders of nonprofit organizations need from their board members? How do you define a meaningful and fulfilling board leadership experience? These questions and more will be addressed by two dynamic duos — each pair consisting of an executive of a leading nonprofit organization and a Morgan Stanley leader who serves on their board.

2:45 p.m. – 3:25 p.m.

AI for Good

Jeff Flaks, *President & CEO, Hartford Healthcare*

Matthew Klein, *Chief Program & Impact Officer, Robin Hood*

Dmitry Koltunov, *Founder and CEO, arbor*

Kevin Barenblat, *Co-Founder and President, Fast Forward*

Moderator: **Jeff McMillan**, *Head of Firmwide Artificial Intelligence, Morgan Stanley*

With great power comes great responsibility. Artificial Intelligence (AI) may be the most transformational technological innovation in our lifetime. This wide-ranging conversation will explore how AI is being used to further social good and advance humanity, as well as the ethical considerations and concerns involved in harnessing this new technology toward a better future for all.

3:25 p.m. – 3:45 p.m.

Networking Break

3:45 p.m. – 4:25 p.m.

Raise Your Voice

Elizabeth Carlock Phillips, *Executive Director, Phillips Foundation*

Gary Jenkins, *Chief Administrative Officer, Oaktree Solutions; Former Commissioner for the NYC Department of Social Services*

Sylvie Légère, *Co-Founder and Chairman of the Board, The Policy Circle*

Moderator: **Sara Barba**, *Principal, Integer*

How do you speak up to influence and create positive change? Many issues require more than just dollars and cents. This panel of public-policy professionals, advocates and activists will discuss how to effectively use your voice to engage with decision-makers and inspire social and policy change at all levels.

4:25 p.m. – 5:05 p.m.

Conscious Consumerism

Vanessa Barboni Hallik, *Founder and CEO, Another Tomorrow*

David de Rothschild, *Founder, Voice for Nature*

Moderator: **Karina Givargisoff**, *Founder and Editor-in-Chief, Mission Magazine*

From the clothing we wear and the food we eat to the products we buy, our choices can yield tremendous impact. This panel discussion will explore the opportunities and innovations across various industries that inspire us to think consciously about the power of our purchases.

5:05 p.m. – 5:25 p.m.

Networking Break

5:25 p.m. – 6:05 p.m.

Stories Spark Movements: Art, Advertising & Action

Daniel Beltrá, *Photographer and Artist*

Molly Gochman, *Founder and President, Stardust*

Lisa Sherman, *President and CEO, The Ad Council*

Moderator: **Andrea Zaretsky**, *Chief Marketing Officer, Morgan Stanley Wealth Management and E*TRADE from Morgan Stanley*

Powerful stories spark movements. Regardless of the issue, it is often an emotional connection through photography, art, advertisements and media that inspires action. In this session, a panel of artists, advertising specialists and expert storytellers will share their compelling work and how they leverage their talent to further efforts that drive social change.

6:05 p.m. – 6:10 p.m.

Brief Closing Remarks

Melanie Schnoll Begun, *Head, Philanthropy Management and Family Office Resources Field Engagement, Morgan Stanley*

President, Morgan Stanley Global Impact Funding Trust

Morgan Grunat, *Philanthropic Advisor, Morgan Stanley*

6:10 p.m. – 7:30 p.m.

Private Viewing of Coal + Ice Exhibition Cocktail Reception and Mingling



Clifford Ross, *Nazaré Wave IX*, Portugal, 2022. Courtesy of the artist.

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Cover: Installation view of **David Breashears'** Mount Everest, Main Rongbuk Glacier, Tibet, China, 2007.

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