

Morgan Stanley

Exchange 2025

A Moment for Courage

TUESDAY, SEPTEMBER 9, 2025, 8:00 A.M. – 6:00 P.M.

MORGAN STANLEY 1585 BROADWAY | NEW YORK, NY



FELLOW CHANGEMAKERS,

Welcome to Exchange 2025: A Moment for Courage.

As we gather today, we do so with a shared belief in the power of connection to spark meaningful change.

Today's conference invites us to reflect deeply, listen generously, and consider the impact of our philanthropic and investment capital not only to respond, but reimagine. Through honest conversations and collective learning, we will discover new ways to change the systems, not just the symptoms, to create fair and more lasting solutions that benefit everyone.

On behalf of Morgan Stanley and your Advisors, we welcome you and are so grateful that you could join us.

In gratitude,

Melanie Schnoll Begun and Morgan Grunat
Co-Chairs, Exchange 2025



MELANIE SCHNOLL BEGUN

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



MORGAN GRUNAT

Philanthropic Advisor, Morgan Stanley

Agenda

Tuesday, September 9, 2025

8:00 a.m. – 9:00 a.m.

Breakfast and Registration

9:00 a.m. – 9:05 a.m.

Welcome Remarks

Melanie Schnoll Begun, *Head of Philanthropy Management and Family Office Resources Field Engagement, Morgan Stanley*; President, *Morgan Stanley Global Impact Funding Trust*
Morgan Grunat, *Philanthropic Advisor, Morgan Stanley*

9:05 a.m. – 9:50 a.m.

A Conversation on Courage

David Cameron, *Lord Cameron of Chipping Norton, Former Prime Minister of the United Kingdom*
Andy Saperstein, *Co-President, Morgan Stanley*

Lord David Cameron and Andy Saperstein will connect for an intimate conversation about their many areas in common. In addition to being two remarkable leaders with a tremendous amount of responsibility, they share a more personal connection in their dedication to fighting rare diseases.

9:50 a.m. – 10:40 a.m.

Investing in Women Is Investing in the World

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

Allison Mignone, *President, Allison and Roberto Mignone Family Foundation*

Dr. Michelle Morse, *Acting Health Commissioner and Chief Medical Officer, NYC Department of Health and Mental Hygiene*

Sanskriti Thakur, *Founder and Managing Partner, Tower Capital Group*

While there has been tremendous investment in improving women's health, these initiatives have been largely fragmented, and outcomes remain inequitable. This interdisciplinary conversation will present a collaborative, systems framework that breaks down silos and more effectively improves women's health and wellbeing, leading to healthier families, communities and societies.

10:40 a.m. – 11:00 a.m.

Networking Break

11:00 a.m. – 11:50 a.m. **Disaster Recovery and Building Resilience**

Alexandra Carter, MBA, CFRE, *Senior Vice President and Chief Development Officer, Children's Hospital Los Angeles*
Nancy Chan, *Executive Director, WoodNext Foundation*
Rob Wilder, *Co-Founder and Vice Chairman, José Andrés Group*
and *World Central Kitchen*
Jocelyn Wyatt, *CEO, Alight*

In response to natural disasters and humanitarian crises, how can philanthropy effectively support both recovery efforts and resilience building? This question will be addressed by a panel of disaster relief leaders and philanthropists who will share their learnings from their experiences on the frontlines of crisis response efforts worldwide, including brief video remarks from José Andrés, Founder and Chief Feeding Officer, World Central Kitchen.

11:50 a.m. – 12:00 p.m. **Remarks From Morgan Stanley Leadership**

Eric Grossman, *Chief Legal Officer and Chief Administrative Officer, Morgan Stanley*
Vince Lumia, *Head of Wealth Management Client Segments, Morgan Stanley*

12:00 p.m. – 1:00 p.m. **Networking Lunch**

1:00 p.m. – 1:50 p.m. **Investing in Place**

Anna Blanding, *Chief Investment Officer, ConnCORP*
Kristine Garlisi, *Executive Director, The Lois & Richard Nicotra Foundation; Chief Operating Officer, The Nicotra Group*
Steven Kohn, *Chairman – Equity, Debt and Structured Finance, Cushman & Wakefield*
Emily Thomas, *Head of Investing with Impact, Morgan Stanley*

How are leading philanthropists investing in the places they call home? This dynamic conversation will bring together funders and local leaders to discuss impactful models, lessons learned, and the transformative power of deeply investing in people and places.

1:50 p.m. – 2:40 p.m. **Multigenerational Philanthropy:
Honoring Legacy and Embracing Change**

David Bokman, *Head of Family Office Resources, Morgan Stanley*
Cayley Tull, *President, Tullman Family Office*
Glen Tullman, *CEO, Tullman Family Office; CEO, Transcarent*

Engaging in multigenerational family philanthropy is a tremendous opportunity, but not one without inherent challenges. This panel conversation will authentically convey the experiences of a family leveraging philanthropy to impart values, foster unity, cultivate leadership and effect lasting change.

2:40 p.m. – 3:00 p.m.

Networking Break

3:00 p.m. – 3:50 p.m.

Increasing Access to Educational Opportunity

Benjamin Kennedy, *Vice President, Programs, Kresge Foundation*
Sam Lalanne, *Chief Diversity Officer, Morgan Stanley*
Steve Mandel, *Founder, Lone Pine Capital*
Frances Messano, *CEO, NewSchools Venture Fund*

While education is known to be one of the most powerful levers for social and economic mobility, millions of students continue to face systemic barriers that limit their access to the education they deserve. Featuring the perspectives of both education sector leaders and philanthropists, this conversation will focus on how to address opportunity gaps that impact educational attainment and what is needed to support a robust and thriving education sector.

3:50 p.m. – 4:40 p.m.

Art for Humanity

Peter Arnold, *Executive Director, Fashion Scholarship Fund*
Alix Schottland, *Founder and President, Over the Rainbow Entertainment*
Zeehan Wazed, *Multidisciplinary Artist*
Julia Yue, *Head of Private Wealth Management Ultra High Net Worth Business Development, Morgan Stanley*

This panel will bring together visionary artists and leaders, who use various forms of expression to illuminate injustice, foster empathy, create awareness and inspire action. Through powerful stories and creative pursuits, they demonstrate how the arts can drive meaningful social impact.

4:40 p.m. – 4:45 p.m.

Closing Remarks

Melanie Schnoll Begun, *Head of Philanthropy Management and Family Office Resources Field Engagement, Morgan Stanley*;
President, Morgan Stanley Global Impact Funding Trust
Morgan Grunat, *Philanthropic Advisor, Morgan Stanley*

4:45 p.m. – 6:00 p.m.

Cocktail Reception and Innovation Marketplace

[Learn More About Our Speakers](#)

Innovation Marketplace Participants



American
Heart
Association.

The **American Heart Association** is a leading funder and curator of heart and brain research, fights for public health policies, provides lifesaving tools and information, and creates science-based treatment guidelines to help ensure quality health care.



Azolla
Ventures

Azolla Ventures, founded by Prime Coalition in 2021, invests in breakthroughs to accelerate transformative climate solutions.

CUSTOM COLLABORATIVE
TRAINING | INCUBATOR | COOPERATIVE

Custom Collaborative empowers women from low-income and immigrant communities through fashion industry training, promoting economic independence and sustainable practices.



First Book is dedicated to ensuring that all children, regardless of their background or zip code, can succeed and reach their full potential.



FOREGROUND
CAPITAL
WOMEN'S HEALTH FRONT AND CENTER

ForeGround Capital is a venture capital firm investing in early-stage women's health companies making care more accessible, affordable, and equitable.

Innovation Marketplace Participants



The Guide Dog Foundation and **America's VetDogs** are sister national nonprofit organizations which breed, raise, train and place guide dogs and service dogs, free-of-charge, for people who are blind or have low vision. The organizations also serve veterans, active-duty military, and first responders with physical and/or emotional disabilities.



Health In Her HUE connects Black women and women of color to culturally sensitive healthcare providers, health content and community support through a digital platform.



Infinite Giving is a financial technology and investment advisory firm that modernizes how nonprofits raise, invest, and steward their money.



Mighty Well creates medical wearables to cover, protect and stylize medical devices, such as chest ports, feeding tubes, PICC lines and diabetic pumps.



Prime Coalition is a nonprofit organization on a mission to empower donors to advance untapped climate solutions with speed and scale.

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