



Global Intellect Summit and Nasdaq Bell Ringing Ceremony
NASDAQ Global Headquarters
4 Times Square
New York, NY 10036
June 22, 2022
10:30am – 8:00pm

Panel Title: Access to Capital Strategy
Time: 4:30 – 5:30pm

Moderator:



Lisa Wardell

Executive Chairman at Adtalem Global Education

Lisa W. Wardell is executive chairman of Adtalem Global Education's board of directors. Wardell was appointed executive chairman of the board in 2021. In her role as executive chairman, Wardell leads the board of directors and helps guide the company's mission and strategy, as well as continues to represent the company and interact with key stakeholders to help advance Adtalem's mission. Wardell has been part of Adtalem's board since 2008, most recently serving as chairman of the board since 2019.

Wardell serves on the boards of American Express (NYSE: AXP), a Fortune 100 company. She serves as a vice chair, executive committee of The Business Council, and as a vice chair of the Kennedy Center Corporate Fund. Wardell also is a member of the board of the Economic Club of Chicago, the Executive Leadership Council, CEO Action for Diversity and Inclusion and the Fortune CEO Initiative. Additionally, Lisa has been featured on CNBC as well as in The Wall Street Journal, Washington Post, Business Insider, Black Enterprise, Cheddar and other publications.

Panelists:



Melissa James

Vice Chairman and Managing Director Global Capital Markets at Morgan Stanley

Melissa James is a Vice Chairman of Morgan Stanley in Global Capital Markets where she currently Co Heads the ESG Center for Excellence working to bring domain expertise around ESG to capital markets and investment banking clients across debt, equity and M&A. Melissa has worked with numerous clients across sectors on strategy formulation and implementation around environmental, social and governance matters. Her work includes advising emerging growth companies on ESG stewardship in preparation for going public as well as structuring and executing ESG labeled capital raises and helping companies think through their capital allocation decisions with an ESG lens. Melissa also oversees capital, liquidity and balance sheet management across Global Capital Markets including running CCAR planning for the division. In addition, she provides risk management oversight and governance for GCM's lending business. Prior to her current responsibilities, Melissa held a number of leadership positions including Global Head of Loan Products where she managed over \$80 billion of loan commitments for the firm's clients. She also Chaired the firm's Capital Commitment Committee and ran the industrial origination effort in Debt Capital Markets where she had responsibility for managing relationships with some of the firm's largest industrial clients.

Melissa sits on the Global Capital Markets Operating Committee. She is a member of the Asset Liability Committee for the Securities Division, the Securities Division's Diversity Council and Morgan Stanley's Women's Business Alliance Steering Committee. Melissa has been recognized by Black Enterprise Magazine as one of the "Top 75 Most Powerful Blacks on Wall Street" and as one of the "50 Most Powerful Women in Corporate America". The Network Journal has recognized her as one of the "25 Influential Black Women in Business". She has a BA degree from Yale and a Masters in Business Administration from Harvard Business School.



John D. China

President, Silicon Valley Bank Capital

John China is focused on providing best-fit financial solutions, insights and connections for Silicon Valley Bank’s clients. Over his 24 years at SVB, John has constantly – and enthusiastically – made connections between entrepreneurs, investors, the Fortune 500, winemakers and now spends most of his time focusing on global limited partners.

As president of SVB Capital, John is responsible for SVB’s funds management business across venture capital (VC), funds of funds and direct funds. In this role, he is responsible for growing and scaling the funds business as well as SVB’s Family Office practice, which includes LIFT, our emerging manager and limited partner matching platform.

John is a member of SVB’s Executive Committee. Previously he led North America technology banking teams specializing in consumer and enterprise software, frontier tech and hardware, fintech, clean energy, private equity, VC and premium wine. He has also been responsible for the company’s corporate venturing group, early-stage banking services, SVB’s global gateway program, the credit solutioning group and corporate finance.

John serves on the advisory board of H2 Global and Hello Alice. He sits on the board of Techstars, the California Partners Project led by Jennifer Newson, BUILD.org, and MOWSF. John earned a bachelor’s degree in industrial engineering from Stanford University. In his spare time, he is learning to kitesurf.



Fred Royall

Managing Director, National Head of Diverse Businesses, JP Morgan Chase

Fred Royall is a Business Development Executive in Commercial Banking with a national focus on diverse businesses. He partners with Middle Market Banking & Specialized Industries segment heads and bankers across the country to identify new opportunities and build upon existing relationships with women and minority-owned businesses.

In addition to driving new business, Fred also focuses on developing an integrated diversity strategy that aligns with Global Supplier Diversity, Advancing Black Pathways and Women on the Move. Fred has over twenty years of capital markets experience. Most recently, he was the CEO and founder of Royall Capital Holdings, LLC, a boutique investment bank that raises capital for private, diverse middle market companies.

Prior to that, he was the Head of Investment Grade Debt Syndicate & Equity Capital Markets at Blaylock Robert Van. Prior to joining Blaylock Robert Van, Fred worked in the equity capital markets group at Credit Suisse First Boston.

He began his career at Merrill Lynch & Co. He earned his undergraduate degree from Syracuse University and MBA degree from Columbia Business School. Fred is a frequent speaker and panelist on topics that address the ability of diverse businesses to gain access to capital. His previous conferences and speaking engagements include the National Utilities Diversity Council, the National Minority Supply Diversity Annual Conference, and the Wall Street Project Economic Summit.



Daphne Dufresne

Managing Partner, GenNx 360 Capital Partners

Daphne Dufresne is a Managing Partner of GenNx360. She brings extensive investment experience to the firm and is engaged in all aspects of the firm's investment activities and portfolio management. She is a voting member of the firm's Investment Committee and Chair of the firm's Exit Committee.

Daphne was a founding partner and a Managing Director of RLJ Equity Partners. She was responsible for sourcing, executing, and monitoring investments, the day-to-day management of the firm including fundraising, and she sat on the firm's four-person Investment Committee, which made final investment decisions. Daphne was Chairman of the Board of Directors of both Fleischmann's Vinegar Company and Media Source Inc. until they were successfully sold. She also led the investment in J&J Africa.

Prior to RLJ Equity Partners, Daphne was a Partner with Parish Capital Advisors, a \$1B fund of funds where she initiated and led their direct investment program. Prior, she was a Principal at Weston Presidio, a diversified private equity fund managing \$4.4B of assets under management. She began her investment career as an Associate Director in the Bank of Scotland's Structured Finance Group, focusing on management buyouts in Europe. Prior to that, Daphne served as an Associate in Accenture's (formerly Andersen Consulting) Strategic Services Group.

Daphne earned her B.S. in Engineering from the University of Pennsylvania and her M.B.A. from Harvard Graduate School of Business. She is happily married with three children.



Nasir Qadree

Founder & Managing Partner, Zeal Capital

Nasir Qadree is the Founder and Managing Partner of Zeal Capital Partners, a new Washington, DC-based inclusive investment vehicle focused on partnering with exceptional management teams with diverse backgrounds and skillsets narrowing America's Wealth and Skills gap.

Most recently, Nasir served as Venture Partner for Pier 70 Ventures, responsible for investor relations and sourcing high growth business opportunities in alignment with the fund's impact investing strategy.

In 2017, Nasir joined AT&T as the Associate Director of Social Investments investing in early-stage education and employment technology businesses that empower students, workers' success and career readiness. Before joining AT&T, Nasir led Village Capital's Economic Opportunity portfolio, sourcing, developing, and investing in high growth businesses solving pressing challenges in Education, Health, and Financial Wellness. Nasir also served as Village Capital's Global Head Education practice and investments.

In 2014, Nasir was appointed as the Special Assistant to the Commissioner of Education at the Connecticut State Department of Education and Education Pioneer Data Analyst Fellow, focusing on improving digital learning and infrastructure to empower teachers and school leaders to improve Connecticut's persistently low-performing school districts. Nasir began his career as an investment professional at Goldman Sachs and later worked as a Senior Associate at State Street Corporation.

In 2018, Nasir was appointed by Washington, DC Mayor Muriel Bowser to serve on the Innovation and Technology Inclusion Council, Chairing it's K12 Engagement committee. Nasir remains personally engaged in education in Washington, DC serving on the boards of LearnFresh Education and Center Point Education Solutions.

He's also committed to completing 51 full marathons, in all 50 states and Washington, DC, having already completed 18 to raise \$1 million in scholarship funding for first-generation college students across America. Nasir is a 2018 Washington Business Journal 40 under 40 recipient. The Atlanta native resides in the Navy Yard community in Washington, DC and graduated magna cum laude from Hampton University.



Ben Carson Jr.

Co-Founder & Partner, FVLCRUM Funds

Mr. Carson is Co-Founder and Partner at FVLCRUM Funds, a CRA Eligible Lower-Middle Market Equity firm based in Washington DC, where he is responsible for the overall strategy of the company and its portfolio. FVLCRUM is one of the few minority-owned private investment firms in the country and targets transactions between \$10-40 million backing proven executive teams leading highly scalable businesses. The fund exclusively invests in minority owned businesses with the goal of creating generational wealth for the executive teams and substantial economic opportunity for minorities.

Prior to founding FVLCRUM, Mr. Carson served in an executive capacity at The Warner Companies, a middle market financial services and consulting firm, where he advised companies on mergers and acquisitions, capital structuring, capital raises, investments, risk management and strategic planning.

Mr. Carson has also been involved in several political initiatives and served on the board of Carson America, the presidential campaign of Dr. Benjamin Carson, in 2016 -17. Mr. Carson continues to be actively involved in political initiatives in Washington, DC to support entrepreneurship, workforce development, and minority – and women-owned businesses.

In 2015, the Carson Family established their Single Family Office, Floreat Park, where Mr. Carson serves as head of the Investment Committee and on the Executive Committee.

Mr. Carson earned a Bachelor of Arts degree in Psychology with a minor in Entrepreneurial Leadership from Tufts University. He is a 2019 AEI Scholar and also the recipient of Baltimore's 35 Under 35 award, the Envest Foundation's 40 Under 40 award, Franchise Journal's MBE Titans, Washington Life's 40 Under 40, and DCA Rising Stars of GovCon. Mr. Carson is dedicated to community involvement and serves on several boards, including Tufts University (Tufts Entrepreneurship Center), Young Presidents Organization (YPO), the Minority Wealth Commission, Mt. Washington Pediatric Hospital Foundation Board, and The Carson Scholars Fund.