

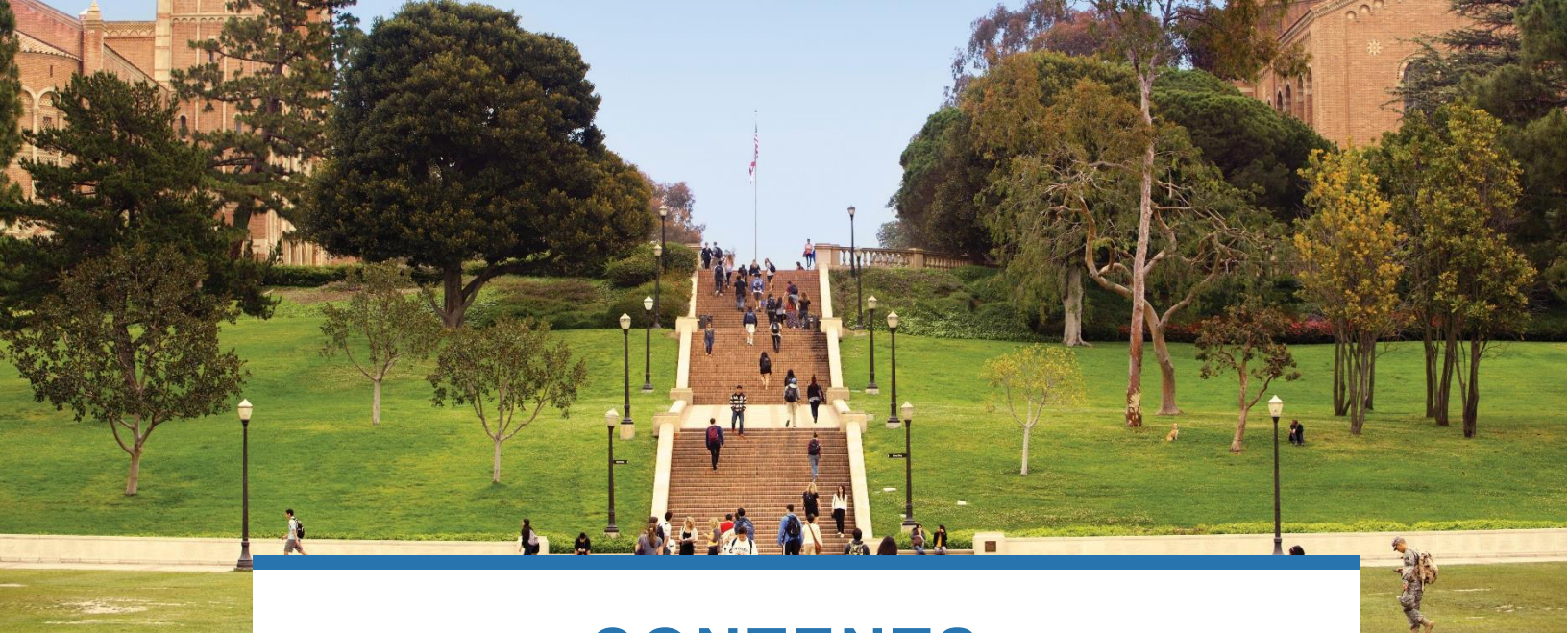
The background of the cover is a photograph of the UCLA campus, featuring the iconic Pechanga Library and the wide, terraced steps of the UCLA Quad. A semi-transparent blue rectangle is overlaid on the image, serving as a background for the text.

UCLA College | Social Sciences
Economics

BOARD OF VISITORS

MANUAL

2026 – 2027



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Board of Visitors Overview

UCLA Economics Board of Visitors Mission

To propel the UCLA Department of Economics to be recognized as the preeminent Economics Department worldwide by ensuring that resources are available to recruit and retain the best faculty and graduate students. To tap the energy and talents of our alumni to ensure that the UCLA Department of Economics continues to be an engine of opportunity, facilitating our graduate and undergraduate students' transition to fulfilling professional lives.

Primary Objectives

- **Ambassador:** Communicate, endorse and advocate the interests of the Department's students, faculty and alumni through peer-to-peer outreach, board recruitment, and events
- **Advice:** Provide advice and counsel to the Department on strategic issues, degree (and non-degree) program needs within the business community, career and internship placement opportunities for students and graduates, along with research and consulting opportunities for faculty
- **Resources:** Provide support and connections to advance the Department's resource development through advocacy with individuals, corporations, and foundations

Board Membership Expectations

- Make a minimum \$30,000 three-year commitment to Board membership (\$10,000 a year)
- Associate Board membership requires minimum annual commitment of \$1,200 a year
- Attendance at bi-annual Board meetings
- Ongoing advice and counsel to Department leadership
- Connect prospective board members and supporters to the Department
- Advocacy of the Department in the community
- Consider additional, meaningful philanthropic support to the Department beyond board giving

UCLA Economics Overview

About UCLA Economics

UCLA is one of the top-ranked economics departments in the world. It has a young and active faculty whose research is shaping policy and informing the public on diverse and critical issues affecting the United States and the world. Many of our faculty have received special recognition for their research by election to prestigious institutions such as the National Academy of Science, the American Academy of Arts & Sciences, and the Econometric Society, or have received such celebrated awards such as the Guggenheim and Sloan Fellowships, and even a Nobel Prize.

Our students are equally impressive. We have over 3,400 undergraduate majors at any one time making the UCLA Department of Economics the largest among top ranked economics departments across the country. Our students come from over 60 countries yet most call California their home. Many of our students are the first in their families to attend college.

Chair's Priorities

- **Growing the Board of Visitors:** The UCLA Economics Board of Visitors was founded in October 2003 by a group of dedicated alumni and friends of the Department. The support provided by the Board has been critical in establishing and advancing successful departmental programs such as the Sharpe Fellows Programs and the Board of Visitors Research Fellows, in addition to providing funds to secure and advance faculty and graduate student research and retention. With the growth and re-energizing of the board in recent years, membership has become an important resource to the department, allowing the Chair to designate funding to critical areas. Continued growth of the Board will not only connect us with more alumni and friends but allow for sustainable funding to address the greatest needs of the Department to ensure its future success.
- **Faculty Retention and Recruitment:** The faculty at UCLA has continued to be increasingly recognized for its world-class, innovative research. While we are proud of the national and international recognition of our faculty we are cognizant of the need to provide resources to recruit and retain the best faculty with whom we must compete with private universities. The board's support has been instrumental in helping to maintain our edge in this competitive environment, but establishing endowed chairs and research funds remains a top priority in our goal to be the top ranked economics department.

- **Securing Graduate Student Fellowships:** Graduate Fellowship support is one of the top priorities not only for UCLA Economics but is also a main focus for the Chancellor because the well-being of our graduate students affects every academic unit on campus. Graduate students work as teaching assistants in many undergraduate courses, in addition to supporting the research of our faculty and conducting their own original research. The challenge of recruiting and funding top graduate students therefore also impacts our ability to sustain the excellence of the undergraduate educational experience. It is critical to increase fellowship funding for our graduate students, who are not only the future scholars in economics, but who are instrumental in supporting faculty research, recruiting and retaining the best faculty, and improving the undergraduate experience.
- **Advancing Undergraduate Programs:** The success of various departmental programs -- including the Benjamin Graham Value Investing Program, Sharpe Fellows Program, Simon Fellows Program, the Board of Visitors Research Fellows, EXEC Transfer Student Program -- have become hallmarks of UCLA Economics. These programs provide fundamental skills to aid our students' career and academic development, competitive internship positions at top companies, while providing engagement opportunities for our alumni and friends. The participants in these programs are the next generation of economic leaders in the private sector, government and academia, and their success requires the continued investment in and expansion of these Department programs.

BOARD MEMBERS



Kevin K. Albert BA '74, MBA '78

Independent Director, Flow Cannabis Co.

Senior Partner, Pantheon Ventures (retired)

Kevin Albert, retired as Senior Partner and Global Head of Business Development, having joined Pantheon in 2010, and has 35 years of private equity experience. Kevin was a member of Pantheon's Partnership Board and was responsible for business development activities globally at Pantheon. Kevin previously worked at Elevation Partners where he was in charge of fundraising and investor relations. For the 24 years prior to joining Elevation, Kevin ran the Global Private Equity Placement Group at Merrill Lynch. He has a BA in economics and an MBA in finance from the University of California, Los Angeles. Kevin is based in New York.



Jim Ardell BA '92

Vice President, Corporate Services

Elevance Health, Inc.

Jim is accountable for leading several distinct corporate services functions, which serve the enterprise:

- **Procurement:** Activities spanning the entire Procure-to-Pay (P2P) lifecycle, overseeing over \$8 billion in annual vendor spend across multiple categories. Sub-functions include sourcing, vendor management, asset management, travel & events, temp labor, accounts payable, operations, and strategic alliances.
- **Corporate Real Estate (CRE):** Real estate transactions, planning, lease administration, facilities management, and workplace experience, across the US and internationally.
- **Business Continuation:** The business continuity program, including its methodology, standards, infrastructure, responsibilities, authority and resources for business continuity planning, emergency management, and response and recovery, covering all critical business processes across the company.
- **Sustainability:** Environmental, Social & Governance reporting, climate strategy and supplier diversity.
- **Front-end:** Processing the intake of paper claims, correspondence and enrollments.
- **Print/Mail:** Outsourced transactional print, internal mailrooms, and multifunctional print devices.
- **Other:** Fleet management of the company's vehicles; the telecom accounting function.

Jim joined the company in March 2005 after serving as a consultant for four years as a senior vice president at Jones Lang LaSalle. Most recently, he was Vice President CRE and Chief Procurement Officer. His previous roles include various positions within the investment management group for Jones Lang LaSalle, the audit department at KPMG Peat Marwick and the Corporate Finance Group at Oppenheimer. Jim earned a Bachelor of Arts in Business Economics from the University of California, Los Angeles, and a Masters of Business Administration from Stanford Graduate School of Business.



Aaron Bendikson BA '96

Partner

Onsight Capital Management

Aaron Bendikson is a Partner at Onsight Capital Management LLC, a firm that he co-founded. He has more than 20 years of investment experience. During his career, Mr. Bendikson has been responsible for making both public and private debt and equity investments across a broad range of sectors. Prior to Onsight, Mr. Bendikson was a Managing Director at Oaktree Capital Management and also a Principal within the private equity affiliate of Soros Fund Management LLC. Mr. Bendikson started his career as an Analyst in the Mergers & Acquisitions group at J.P. Morgan & Co. Mr. Bendikson received an M.B.A. from Harvard Business School and a B.A. degree cum laude in Economics and History from the University of California at Los Angeles, where he was elected to Phi Beta Kappa. Mr. Bendikson has served as a member of the board of directors of numerous public and private companies as well as charitable foundations.



Will Brilliant BA '96

Partner

Global Infrastructure Partners

Will Brilliant is a Partner, having joined GIP in 2007. He focuses on the digital and energy sectors. He is based in New York.

Prior to GIP, Mr. Brilliant served as an Associate in the Global Financial Sponsors Group of Lehman Brothers' Investment Banking Division. Mr. Brilliant holds a B.A. in Economics from the University of California at Los Angeles and an M.B.A. from the Wharton School of the University of Pennsylvania. He is also on the Executive Committee of the NY Make-A-Wish Board.



Brad J. Brutocao BA '95

Partner

Freeman Spogli & Co.

Brad Brutocao is a Partner with Freeman Spogli & Co., a leading middle-market private equity firm dedicated to investing in and partnering with management in businesses in the consumer and distribution sectors. Based in Los Angeles and with offices in New York, Freeman Spogli has over \$5 billion of assets under management and has invested in over 70 companies since its founding in 1983.

Mr. Brutocao joined the firm in 1997 and is active in the firm's investment and portfolio management activities. Prior to joining Freeman Spogli, Mr. Brutocao worked at Morgan Stanley in the Mergers and Acquisitions and Corporate Finance departments. Mr. Brutocao is a Member of the Board of Directors of the Partnership for Los Angeles Schools, one of the largest in-district public school transformation organizations in the United States, where he chairs the Finance Committee. Mr. Brutocao's service to UCLA includes lecturing and serving as an Investor in Residence in the Benjamin Graham Value Investing Program and serving as a member of the UCLA Economics Board of Visitors. Mr. Brutocao received his bachelor's degree magna cum laude in business economics from UCLA.



John R. Bucher BA '82

COO

PRIMECAP Management Company .

John rejoined PRIMECAP Management Company as COO in September 2018. PRIMECAP is a long-only, equity-only investment management company that is the investment advisor for the PRIMECAP Odyssey Mutual Fund Series. The Firm also manages equity portfolios for a limited number of institutional clients, including the Vanguard Group.

Previously, John served as SVP of Strategy for the semiconductor foundry/manufacturer GlobalFoundries (GF). At GF, John oversaw strategic planning, M&A, venture investing, competitive analysis and industry benchmarking. On the M&A front, John was a member of GF's deal team when the company acquired IBM's Microelectronics operations and semiconductor manufacturing assets in 2015. Prior to GF, John served as the Chief Strategy Officer (CSO) of Motorola Mobility (MMI). As CSO, John was responsible for strategic planning, M&A and Ventures for both MMI's Home (cable infrastructure and set-top box) and Mobile Devices businesses. John was also a member of the Motorola deal team when Google acquired MMI in 2012 at the headline valuation of \$12.5 billion.

Prior to joining Motorola, John worked as a buy-side investment analyst for his current employer, PRIMECAP Management Company. Prior to PRIMECAP, John worked as a Wall Street sell-side analyst and Managing Director at the Bank of Montreal (BMO Capital Markets), including predecessor firm Gerard Klauer Mattison. During the early-to-mid 1990s, John held product management, marketing and network operations positions with Bell Atlantic/NYNEX Mobile and PCS PrimeCo, which now collectively constitute Verizon Wireless.

John began his career in 1983 as an officer in the United States Marine Corps (USMC), where he served on active duty for ten years, including two overseas deployments with an A-6 Intruder all-weather attack squadron, one tour as a forward air controller (FAC) with a special-operations-capable (SOC) infantry battalion, and one tour in procurement with the Marine Corps Systems Command. John holds an MS in Telecommunications Systems Management from the Naval Postgraduate School and a BA in Economics from UCLA.



Joseph V. Fellerman BA '73

Principal

RRP Global, LLC

Joseph V. Fellerman is the Principal of the firm RRP Global, LLC which provides advice and guidance on significant regulatory matters to the largest financial firms in the world as well as major advisory firms. Mr. Fellerman has over 45 years of banking experience in both the regulatory and private sector space, providing a unique perspective on governance, market and balance sheet risk, liquidity and asset management, with an emphasis on regulatory and private sector responses to banking crises.



Valentina Glaviano BA '85

*Managing Director
Strategic Investment Group*

Valentina is responsible for building new client relationships. She has over 35 years of experience working in investment management holding senior leadership positions at Guggenheim Investments, iShares, and Lazard Asset Management.

She is a member of Strategic's Diversity, Equity, and Inclusion Committee, a cross-functional team that works to develop and retain diverse talent both within the firm and within the financial industry, to encourage and evaluate diversity within our sphere of influence (our firm, our managers, our vendors), and to foster an equitable and respectful work environment throughout the firm. Prior to joining Strategic, she was a Director at Covariance Capital Management, formerly a subsidiary of TIAA Endowment & Philanthropic Services. At Covariance, Valentina headed a business development effort to provide comprehensive OCIO services to non-profits with complex investment and risk management needs. Valentina received a B.S. in Economics from the University of California at Los Angeles. She is a Certified Investment Management Analyst professional and has also been elected as a member of the International Women's Forum ("IWF"). IWF's members are elected by IWF leadership and include more than 7,000 diverse and accomplished women from 33 nations on six continents.



Michael C. Iracondo,CTP BA '91

*Vice President, Treasury
The Clorox Company*

Michael leads Clorox's worldwide treasury operations, ensuring that the company maintains liquidity requirements and access to capital markets to support operating needs and fund strategic initiatives, developing and executing capital structure and allocation decisions, leading the Company's efforts to mitigate financial risk associated with commodity price, foreign exchange, and interest rate volatility, and providing direction and oversight of the Company's defined contribution plan investments.

Over more than 20 years at Clorox, Michael has provided thought leadership to a variety of strategic initiatives, including transformational operating model and technology projects, financing and integrating acquisitions, supporting divestitures, and helping the Company achieve climate stewardship goals. Before joining treasury in 2005, Michael held roles in Clorox's accounting and investor relations departments. Prior to Clorox, Michael worked at EY in their audit practice in San Francisco and London, and in treasury with Transamerica Corporation in San Francisco.

Michael received his B.A. in economics/business from UCLA, is a Certified Treasury Professional and Certified Public Accountant (inactive) and currently serves as a member of the UCLA Economics Department Board of Visitors.



Terry D. Kramer BA '82

*Adjunct Professor, UCLA Anderson School
Former US Ambassador*

Terry has a 30 year career in telecommunications. For 18 of the 30 years, Terry worked for Vodafone Group Plc/AirTouch Communications in a variety of roles domestically and internationally including Group Strategy and Business Improvement Officer and Regional President, Vodafone Americas which included oversight of Vodafone's 45% interest in Verizon Wireless and Vodafone's venture capital activities. Terry also sat on the Executive Committee of Vodafone Group Plc and on the Board of Verizon Wireless.

In June 2012, Terry received an appointment by President Obama to serve as Ambassador, Head of U.S. Delegation for the World Conference on International Telecommunications. This 100 person delegation comprised of members of U.S. Government, industry and civil society, formulated and communicated the U.S. policy regarding the criticality of a free and open internet, the criticality of inclusive, multi stakeholder governance, the need to proactively address cybersecurity threats and the need for liberalized, open markets which encourage accelerated broadband access globally.

Terry is currently the Faculty Director of the UCLA Anderson's Easton Technology Management Center, which is responsible for preparing the next generation of leaders for a world driven by technology-based innovation. He is also a full time Adjunct Professor at UCLA's Anderson School of Management teaching three courses—the foundational technology management course covering the impact of disruptive innovation on products, services, markets and competition, another course on technology and society addressing the changing nature of leadership addressing the benefits technology can offer juxtaposed against a growing techlash and a third course—a global immersion program covering the transformational impact of technology on the greater China region. From 2011-13, he was an Entrepreneur in Residence at the Harvard Business School. In each year from 2017-2021, he was awarded UCLA Anderson Teacher of The Year by the Fully Employed Executive MBA's and in 2019 additionally received the Citibank Teaching Award.

Terry sits on the Advisory Board of RapidSOS, is the Board Chair of the Harvard Business School California Research Center and is a member on the UCLA Economics Department Board of Visitors. He is also the former Board Chair of Skylo Technologies. Terry holds a Bachelor's degree in Economics from UCLA and MBA from Harvard University and resides in the San Francisco Bay Area.



Erik Lam BA '98

*Chief Relationship Officer
Coatue Management*

Erik Lam is Chief Relationship Officer at Coatue Management, a New York-based global investment firm focused on technology investing. During his more than 12 years at Coatue, he has led the firm's strategic relationships across the Asia-Pacific region. Prior to joining Coatue, Erik served as Head of Asia Sales at Auerbach Grayson. Earlier in his career, he was an equity research analyst at AllianceBernstein and Prudential Securities, where he covered consumer companies. Erik earned a Bachelor of Science in Mathematics and Applied Science from UCLA and an MBA from New York University. He also serves as Vice Chairman of the Board of NPIC, a Dallas-based pet wellness company.



Albert Lee Ph.D. '99

*Founding Principal
Summit Consulting, LLC*

Dr. Albert J. Lee is the founding principal of Summit Consulting, a Washington D.C.-based consultancy. He has extensive experience managing consulting engagements involving diverse teams of experts and professionals.

Prior Summit, he was a senior consultant at Bates White LLC, where he specialized in economic damages. Albert participated in some of the largest litigated matters handled by Bates White. He was also a manager at KPMG. His clients included many Fortune 500 companies.

At Summit, Albert has led a number of high-profile engagements and served as a testifying expert. Under his leadership, Summit was recognized by Inc. Magazine in 2015 and 2016 as one of the fastest growing firms in the U.S. Summit also earned the 2015 Seal of Distinction Award from WorldatWork Alliance for employee work-life balance.

A frequent lecturer at universities, Albert received his PhD from UCLA, and a B.A. from USC. He served as the UCLA Centennial Campaign chair for the New York region, and is a member of the Board of Visitors of the UCLA Economics Department. Since 2021, Albert has served on the Board of Trustees at Harvey Mudd College. Albert spends the bulk of his free time from work enjoying the company of his family, supporting local charitable organizations. He hails from Hong Kong and visits Asia frequently but spent his formative years in New York City. Southern California is his second home.



Paul Lin BA '99

*Chief Executive Officer
United Pacific Industries, Inc*

Paul Lin serves as the Chief Executive Officer (CEO) and co-owner of United Pacific Industries, Inc. (UPI). Over his 25-year tenure, he has led the company through significant milestones, including substantial revenue growth, the implementation of ERP, WMS, CRM, and PIM systems, and the successful

completion of two built-to-suit industrial warehouse developments totaling more than 500,000 square feet.

UPI maintains a global presence, with offices in Taiwan and Shanghai, as well as distribution centers in California and Texas, supporting the company's extensive supply chain and operational capabilities. Paul holds a Bachelor of Arts degree in Economics from the University of California, Los Angeles. He began his career at PricewaterhouseCoopers (PwC), where he earned his Certified Public Accountant (CPA) license before joining UPI in 2001.



Christian MacCarren BA '07

*Vice President
Capitala Investment Advisors*

Christian MacCarron is a vice president of Capitala Investment Advisors, opening the firm's Los Angeles location in 2014. Prior to joining Capitala, Christian worked in distressed and healthy private equity investing at Platinum Equity and

Windjammer Capital Investors and in investment banking at Merrill Lynch and FocalPoint Partners. Christian received a BA in Economics from UCLA.



Andreas Martin MBA '06

*Managing Director
Bank of America Merrill Lynch*

Andreas Martin has over 20 years of experience across investment banking, corporate finance, and asset management. Andreas is a Managing Director in the Financial Sponsors Group at Bank of America Merrill Lynch (BAML) where he is responsible for providing strategic advisory and capital solutions to private equity firms and their portfolio companies. Andreas leads all aspects of origination, underwriting, deal execution, and portfolio management. He has a proven track record with over \$300 billion in aggregate transaction value across a variety of industries with a particular focus on software, technology, and tech-enabled businesses.

Prior to joining BAML, Andreas was a Vice President at Credit Suisse where he evaluated, structured, and executed leveraged loan and high yield financings, public and private equity financings, M&A, LBOs, and restructurings for financial sponsors and corporate clients. Previously, he provided financial advisory services at Corporate Value Consulting (now part of Duff & Phelps) and Arthur Andersen. Andreas began his career as an investment analyst at Aegis Asset Management.

Andreas received his MBA from the UCLA Anderson School of Management and BA in business economics from the University of California, Santa Barbara. Andreas is a CFA Charterholder and member of the CFA Society of San Francisco. He is also NACD Board Certified and a member of both the National Association of Corporate Directors and Private Directors Association.



Ronald D. Mass BA '87

*Managing Partner
Almitas Capital, LLC*

Ronald Mass is the founder of Almitas Capital. He was a senior portfolio manager for over 20 years at Western Asset Management, an institutional fixed income manager with over \$450 billion in assets under management, and led the Asset Backed Securities (ABS) and Mortgage Backed Securities (MBS) portfolio management teams. Mr. Mass chaired the Leveraged Products Committee, was a senior member of the Broad Market Strategy and Risk Management Committees, and was responsible for management of over \$100 billion in assets. He initiated the launch and management of the Western Asset Mortgage Capital (WMC) Reit, numerous closed and open end mutual funds, CDO and CLO products, and customized client portfolios. Additional responsibilities included management of Convertible Bonds, Preferred Stock, Aircraft Equipment Financing, and Secured Corporate Bonds.

Prior to joining Western Asset, Mr. Mass was a Research Associate at Credit Suisse First Boston. He graduated Magna Cum Laude and Phi Beta Kappa from the University of California, Los Angeles with a Bachelors in Economics and Business. Mr. Mass is a CFA Charterholder and a member of the CFA Institute. He currently serves as a board member of Woodside Homes, a leading West Coast homebuilder, is a guest lecturer at the UCLA Anderson School of Management and CFA Society of Los Angeles, and is a frequent speaker at industry events.



Brandon Matloff

Financial Advisor and Entrepreneur

With over 19 years of experience in the wealth management industry, Brandon is a principal at Northwestern Mutual Wealth Management Co. | Stella Oak Financial, where he provides comprehensive financial planning and investment advisory services to high-net-worth individuals, families and businesses. Brandon has expertise in mergers and acquisitions (M&A), estate planning, retirement planning and tax strategies. Brandon has built a multi-million dollar practice working part time.



Sanjay Morey BA '94

Founding Partner

Twin Ridge Capital Management

Sanjay Morey is a Co-Founder of Twin Ridge Capital Management ("TRC"), a private equity firm focused on investing in family-owned food and food-related businesses. Prior to founding TRC, Mr. Morey was a senior executive at Kohlberg Kravis Roberts & Co. (KKR) focused on retail and consumer investments. Mr. Morey holds a B.A., magna cum laude, Phi Beta Kappa, from the University of California, Los Angeles and an M.B.A. from Harvard Business School.



Ayuko Mueller BA '95

Head of Finance Transformation

Bloomberg LP

Ayuko Mueller brings a robust and diverse background through her extensive managerial experience in the global banking sector across the U.S. and Asia. Her leadership is characterized by strategic financial planning, operational efficiency, and stakeholder collaboration at both regional and global levels.

She has the proven ability to build high-performing teams from the grounds up. She is known for her inclusive leadership style and emphasis on developing talent, fostering a culture of accountability, and instilling a shared vision on a global scale. Her leadership in transformation projects has earned accolades for not only meeting business objectives but also cultivating cohesive, motivated teams that thrive in fast-changing environments.

Currently, Ayuko leads the Finance Transformation team at Bloomberg Inc., where she oversees large-scale initiatives aimed at re-engineering core financial processes and implementing advanced systems to improve transparency, scalability, and automation.



Elizabeth Obershaw BA '81

*Retired Managing Director
Horsley Bridge Partners*

Elizabeth is retired Managing Director at Horsley Bridge Partners, a private equity firm which she joined in 2007. She was previously the Chief Investment Officer of Hewlett-Packard Company's U.S. retirement plans, investing across the major public and private market asset classes. Elizabeth holds a BA in Economics from UCLA and an MBA from Stanford University.



Doug Pak BA '96

*Principle and Owner
BLD Brands*

Doug Pak is a serial entrepreneur and seasoned executive. Mr. Pak founded a chain restaurant and franchise investment company (BLD Brands) with no money in his pocket and raised more than \$120 Mill. The company grew from scratch to \$200+ Mill in 8 years and such fast growth earned him MVP Award for Mega Growth Leadership. He recently launched BLD Ventures to focus on building and supporting companies and organizations that make a positive impact and deliver high value. The company also makes opportunistic investments. His prior work and startup experiences include such diverse areas as technology, real estate, finance, and restaurants.

He graduated UCLA in 1996 with a degree in business/ economics and currently serves on two UCLA advisory boards. In addition, he is a donor to Pak Family Endowed Speaker Series which will launch in the 2023 school year. He has served at the Pepperdine University Board and several private and non-profit companies.



Sandeep Pathak BA '97

*Chief Executive Officer
MDP Capital*



Art Perez BA '95

*Chief Audit Executive
Salesforce*

Art Perez is executive vice president, chief audit executive at Salesforce where he brings over 30 years of Silicon Valley tech experience to the world's #1 Agentic CRM where humans and AI agents drive customer success. Art leads a global team of internal audit professionals who protect trust, provide assurance and business insights for board oversight, and support enterprise risk management. He has worked closely with the Salesforce board in his present role and across his other executive roles at the company over the last decade. Previously, Art was a partner with EY in the Assurance and Advisory Business Services practice and held leadership roles at venture-backed technology startups. He also serves on the non-profit board of The Institute of Internal Auditors, San Francisco and volunteers in the Salesforce Amplify Mentorship Program and Alumni Mentoring Program for students at UCLA.

Art earned his BA in Business Economics from UCLA and completed leadership and board governance programs at Stanford University and Harvard Business School. Art is certified as a CPA, CIA, and National Association of Corporate Directorship Certified (NACD.DC).



Jim Renton BA '64

Attorney (retired)



Sam Sheth BA '89

*Founder and Senior Managing Director
VerityPoint*

Sam is a founder and Senior Managing Director of VerityPoint. Since 1994, Sam has worked with several of the nation's largest corporations and institutions to develop and implement executive and employee benefit plans that are most effective and efficient. He has worked with clients in a broad range of industries and is dedicated to helping them solve their unique benefit related challenges.

Sam's expertise includes all aspects of nonqualified plans (including Deferred Compensation Plans, Supplemental Executive Retirement Plans, Rabbi Trusts and specialized state-of-the-art nonqualified plans), as well as other broad-based employee benefit plans. He is a frequent speaker on these topics, having spoken at World at Work, The Conference Board and other industry events.

Sam shares a strong commitment to the community and currently serves as a Board member and member of the Executive Committee for Junior Achievement of Southern California, and as a Board member for the Torrance Memorial Hospital Foundation. He has also previously served on UCLA's Alumni Association Board and the UCLA Foundation's Board of Governors. Sam is also an active member of several other industry and community-based organizations. Sam graduated from the University of California, Los Angeles with a degree in Business and Economics in 1989.



Mila Skulkina BA '01, MBA '07

*CFA, Senior Managing Director
Lord, Abbett & Co.*

Mila Skulkina is the Head of Emerging Markets Fixed Income and a portfolio manager at Lord Abbett. She manages emerging markets sovereign and corporate debt across fixed income and multi-asset portfolios. Ms. Skulkina leads the ESG Sovereign analysis and integration for Emerging Markets. Prior to joining Lord Abbett in 2013, Ms. Skulkina was a research analyst at Sanders Capital working across long-only, long/short, and multi-asset portfolios. Previously, she was a strategy consultant at Bain & Company and an investment banking analyst at Merrill Lynch. She has 20 years of investment experience and holds an MBA from the UCLA Anderson School of Management. She received her undergraduate degree in business economics from UCLA, graduating summa cum laude. She is also a member of the Board of Visitors of the UCLA Economics Department and a member of the Bretton Woods Committee.



Mark Spindel

*Founder and Chief Investment Officer
Potomac River Capital, LLC*

Mr. Spindel is the Co-Founder and Chief Investment Officer of MBB Capital Partners, a Chicago-based single family office. Mark and his team manage a global investment portfolio across a broad range of public markets and private assets including PE, VC and Real Estate. Prior to launching MBB, Mark was the CIO of the DC Retirement Board, an \$11bn municipal pension plan covering Washington DC's 25,000 Police Officers, Fire Fighters and Teachers. In 2007, Mark launched and ran Potomac River Capital, an SEC-registered macro hedge fund with a specific focus on the intersection of macroeconomics, central bank policy and financial markets. Mr. Spindel spent a decade at the World Bank where he was Deputy Treasurer and CIO of the International Finance Corporation investing \$15B in reserves.

He was also on the board of the World Bank's pension fund where he helped oversee strategic asset allocation. Mark began his career at Salomon Brothers in 1985. Mark's practical investment experience is complemented by on-going, award-winning academic research. His work on the Federal Reserve includes *The Myth of Independence* (Princeton University Press, 2017), a history of the Fed's relationship with Congress. Mark graduated from Cornell University with a BS in Operations Research and Industrial Engineering. He is a member of the Board of Visitors of the UCLA Economics Department where he is also an investor-in-residence.



Tracy Stuart BA '83

Managing Partner

Corbin Capital Partners

Tracy serves as the Chief Executive Officer and is a Managing Partner of Corbin Capital Partners, a New York-based majority women-owned independent alternative asset management firm that specializes in multi-strategy and opportunistic credit investing. Corbin has experience creating and managing differentiated commingled and bespoke portfolios for investors globally. As of August 1, 2025, Corbin has \$ 9.7 billion in assets under management.

With over 30 years of industry experience, Tracy is responsible for management of the firm and is a member of Corbin's Multi-Strategy Investment Committee, Credit Investment Committee, and Operating Committee. Prior to joining Corbin in April 2004, Tracy was Managing Director and Head of the Global Multi-Manager Strategies group at Goldman Sachs Asset Management. Previously, Tracy was a Managing Director at BARRA/RogersCasey Strategic Consulting Group ("BSCG") a consultant at Wilshire Associates, Inc. and a financial analyst at SEI Corporation. Tracy graduated from UCLA with a B.A. in Economics. She received her M.I.M. from the American Graduate School of International Management (Thunderbird) and was awarded the CFA charter in 1992.

Tracy lives in Fairfield, Connecticut with her husband, Tim, and their two children. Tracy passionately supports organizations focused on women's and children's issues. She currently serves on the Board of Save the Children's Head Start Program, where she chairs the Audit and Finance Committee, and previously served on the Board of Save the Children, where she chaired the Investment Committee. Former board involvement includes High Water Women and Shepherd's Inc. Additionally, Tracy is an Advisory Committee Member of No Labels, a group committed to bipartisanship by bringing Congressional Democrats and Republicans together to break the gridlock in Washington.



Shaun Tan BA '96

Entrepreneur



Ben Wallace BA '02

*Partner
Goldman Sachs*

Ben Wallace is a Partner in the Healthcare Investment Banking Group and the Mergers & Acquisitions Group, where he has responsibility for originating and advising on M&A transactions across Goldman Sachs' healthcare franchise. During his career, Ben has advised on hundreds of M&A transactions, resulting in over \$700 billion of announced transactions across a variety of mergers, divestitures, unsolicited M&A, corporate defense and other structured transactions. Prior to joining Goldman Sachs, Ben was a Managing Director at J.P. Morgan, where he led Mergers & Acquisitions across several industry sectors, including Healthcare. Ben earned a BA in Business Economics, magna cum laude, from the University of California, Los Angeles and an MBA from the University of Chicago. He resides in New York City with his wife and three sons.



Brandon Watkins BA '10

*Partner, Global Head of Internet Investment Banking, TMT Investment Banking
Goldman Sachs*

Brandon Watkins is a Partner in TMT Investment Banking and Global Head of Digital Finance Banking at Goldman Sachs, where he advises leading technology and fintech companies on IPOs, capital raising, and mergers and acquisitions. Since joining the firm, he has played a key role in major transactions involving Robinhood, SoFi, Plaid, and Credit Karma. A Forbes 30 Under 30 honoree in Finance, Watkins holds a degree in Business Economics with a focus on Accounting from UCLA.



Wendy Will BA '90

Member, UCLA Economics Board of Visitors

Wendy spent 14 years at Digital Realty as the Senior Vice President, Capital Markets in San Francisco. Wendy was instrumental to Digital's transformation from private equity IPO to an S&P 500 company. She delivered over \$15.B of equity and \$14.B of debt to fund over 200 portfolio properties with a \$35B market capitalization. She also led efforts to obtain BBB investment grade credit ratings 5 years after the IPO and during the 2009 Financial Crisis.

As CFO and Managing Director of EMEA, Wendy relocated to London in a 5-year role to transform the region for accelerated growth. She led Digital's inaugural and follow-on Sterling, European, and Green Bond offerings and expanded her role to include Operations. Wendy grew the region from 23 to 40 properties, increasing revenues over 57%. Wendy overhauled EMEA's strategy, initiated key performance indicators, and implemented ESG programs. She also led portfolio and IT system integrations for eight portfolio acquisitions spanning the world and totaling over \$6B in value.

Previously, Wendy spent six years at Prudential Capital Group. In that role, she managed over a \$1.5 billion portfolio comprised of senior and mezzanine debt as well as private equity investments. Wendy also spent five years at Price Waterhouse with responsibility for audit and computer information systems consulting engagements. Wendy received a Bachelor of Arts in Economics/Business from the University of California, Los Angeles and a Master of Business Administration from the Fuqua School of Business at Duke University. She is also a CPA.

Wendy has been active with UCLA on the Centennial Capital Campaign (in the UK and US), Chancellor's Society, Chancellor's Cabinet, and Alumni Scholarship Committees. She is also a member of the Golden Gate National Parks Conservancy, the California Academy of Sciences, San Francisco Bay Area Planning and Urban Research Association.



Clay Young BA '85

*Former Senior Partner
Deloitte & Touche LLP*

Clay is a retired senior partner from Deloitte & Touche LLP. He served clients predominantly in the Technology and Banking sectors, specializing in ERP implementation and IT/Cyber auditing. He held various roles in practice leadership and for client service teams during his 33 years at Deloitte. Clay has served on the boards of Junior Achievement and RAFT (Resource Area for Teachers). He has a BA in Economics from UCLA, and an MBA in Finance from the University of Chicago.

ASSOCIATE BOARD MEMBERS



David Buck BA '10

Vice President

Oaktree Capital Management

David Buck is a Vice President at Oaktree Capital Management, L.P., where he focuses on acquisitions for the firm's \$8.6 billion real estate strategy. Prior to joining Oaktree in 2013, Mr. Buck worked for Morgan Stanley's Real Estate Investing group in San Francisco. Mr. Buck received a B.A. degree in Business Economics from the University of California, Los Angeles, where he was a 2010 William Sharpe Fellow.



Jamie Claypool, CFA BA '08

Senior Vice President

Capital Group | American Funds



Andrew Morris BA '10

Managing Director

Solace Capital Partners

Mr. Morris joined Solace in 2014. Prior to joining Solace, Mr. Morris was an Associate at Saybrook Capital, LLC where he focused on lower-middle market special situations and distressed debt investments spanning a number of sectors including manufacturing, food, construction services, rental equipment and business services. Previously, Mr. Morris interned with Saybrook while earning a BA in Economics from the University of California, Los Angeles. Mr. Morris is a Chartered Financial Analyst and a member of the board of CST Industries, Patriot Environmental Services, and Sun Mountain Sports. Mr. Morris also serves on the Los Angeles Metro Advisory Board for the Network for Teaching Entrepreneurship and the UCLA Economics Associate Board of Visitors.



Ciaran O'Neill BA '23

Private Equity Analyst

One Rock Capital Partners

Ciaran O'Neill is a Private Equity Analyst at One Rock Capital Partners. Ciaran graduated from the University of California, Los Angeles with a degree in Business Economics and a Concentration in Value Investing. He was also a Simon Fellow and William F. Sharpe Fellow.



Jack Posner BA '23

*Private Equity Associate
Coalesce Capital*

Jack Posner is a Private Equity Associate at Coalesce Capital, a New York based Private Equity firm investing in human capital and technology enabled business services companies. Prior to Coalesce, Jack was an Investment Banking Analyst at Morgan Stanley in the Financial Institutions Group. Jack graduated from the University of California, Los Angeles with a degree in economics and a concentration in value investing. During his time on campus, Jack was the President of the Bruin Investment and Trading Group, and held leadership roles for the Undergraduate Business Society.



Henry Pray BA '16

*Head of Product
Up.Labs*

Henry is a head of product at UP.Labs, a venture incubation firm focusing on creating mobility startups. Prior to UP.Labs, Henry acted as head of product at various startups while working under Boston Consulting Group's corporate innovation arm, was director of product at UpKeep, and co-founded a fintech stock trading app. During his time at UCLA, Henry graduated with a degree in Economics and was a member of the NCAA water polo team.



Spencer Schlee BA '10

*Managing Director
Canyon Partners LLC*

Spencer Schlee, Managing Director, heads the Southwest region for Canyon's opportunistic and value-add real estate platforms and is responsible for originating, structuring and executing both equity and debt investments. Mr. Schlee joined Canyon's acquisitions team in 2012 and has since worked on transactions investing over \$1.0 billion of committed capital and totaling over \$3.0 billion in total capitalization across various sectors including multifamily, hospitality, office, retail, senior housing and mixed-use. Prior to joining Canyon, Mr. Schlee was an analyst at BlackRock in New York and is a graduate of the University of California, Los Angeles (B.A. Business Economics).



Parsa Sobhani BA '09

Parsa Sobhani has a career in corporate strategy, advisory, and M&A. He previously held investment banking roles at Barclays and Perella Weinberg Partners, where he focused on financial institution coverage. He has provided strategic advisory for public and private company C-suites throughout the business life cycle, from early-stage investments and capital raising to take-private transactions and transformational M&A. He previously held investment advisory roles at Mozaic LLC, a multi-family office for UHNW families, foundations, and corporations.

Mr. Sobhani holds a Bachelor of Arts in Economics with minors in Statistics and Global Studies from UCLA, a Fellowship in Public Affairs from Coro Southern California, and a Masters of Business Administration from NYU Stern School of Business.



Albert Wang BA '23

*Technology Strategy & Advisory Analyst
Accenture*

Albert Wang is a Technology Strategy & Advisory Analyst at Accenture. Prior to joining Accenture, Albert worked at the Walt Disney Company as a Group Business Planning Analyst under the Disneyland department.

Albert graduated from the University of California, Los Angeles with a degree in Mathematics and Economics. During his time at UCLA, Albert was a William F. Sharpe Fellow and won the 2023 Social Enterprise Academy Competition. Albert will be heading to the University of Chicago Booth School of Business in 2 to 5 years as part of the deferred MBA admissions program.



Adam Wong BA '21

*Associate
Bain Capital*

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