EAST COAST CLASSIC

30 YEARS

Expect Miracles Foundation's 2024

EAST COAST CLASSIC

Pinehills Golf Club

JUNE 13 | PLYMOUTH, MA



Agenda

10:00 am - 10:45 am .... Golf Entertainer,
Dan Boever

11:15 am ..... Shotgun Start

11:15 am - 4:30 pm ..... Golf

4:30 pm - 6:00 pm ..... Post Golf Reception



Our Mission

Expect Miracles Foundation rallies the financial services industry and beyond to invest in life-saving cancer research while advancing the financial and emotional health of people impacted by cancer. We are a 501(c)(3) public charity.

Tax ID # 20-4127495 | expectmiraclesfoundation.org

Welcome to the East Coast Classic 2024

Celebrating 30 Years of Miracles and Impact

Dear Friends and Supporters,

It is with immense pride and gratitude that we welcome you to the 30th anniversary of the East Coast Classic Golf Tournament. This milestone event marks three decades of our collective dedication to the cancer community. Since its inception, the East Coast Classic has been more than just a golf tournament. It has been a beacon of hope and a catalyst for change, fostering a community united in the fight against cancer. Over the past 30 years, your unwavering support has allowed us to make significant strides in cancer research and survivorship programs.

A Day of Legacy and Impact
Whether you are joining us for the first time or have been part of this journey from the beginning, today is a testament to what we can accomplish together. As you enjoy the tournament, we invite you to participate in our fundraising initiatives, knowing that every contribution, large or small, makes a profound difference.

Support Groundbreaking Cancer Research
Funds raised today will benefit EMF's Discovery Fund at Dana-Farber Cancer Institute. Your generosity fuels the pioneering work of doctors and scientists who are accelerating the development of next-generation therapies, improving and extending the lives of cancer patients worldwide.

Empower Cancer Survivors
Your donations also support EMF's SAMFund Grants Program, which provides crucial financial assistance to young adult cancer survivors. These grants help them regain their financial stability and move forward with their lives after treatment.

There are numerous ways to make an impact today: participate in our on-course activities, become a Miracle Maker, or donate at our mission hole. Every act of kindness propels us closer to a brighter future for the cancer community.

A Heartfelt Thank You
We extend our deepest gratitude to our corporate sponsors for their visionary leadership and generosity. A special thanks to our event sponsors, loyal partners, and dedicated volunteers who have worked tirelessly to make today's event a success. Your support embodies the spirit of hope and resilience that defines our mission.

As we celebrate this 30-year milestone, we look forward to many more years of collaboration, innovation, and most importantly, miracles.

Enjoy this special day of impact, camaraderie, and fun.

With heartfelt appreciation,

Frank Strauss
Founder & Chairman

Frank Heavey
Executive Director

EMPOWER ACTIONS

that go beyond words.



At BNY Mellon, we celebrate actions that lead to greater good. As a company committed to powering success for all, we are honored to support Expect Miracles Foundation.

Expect Miracles
FOUNDATION
Financial Services Against Cancer

THE BANK OF NEW YORK MELLON



From the Foundation Sponsor:

BNY Mellon is a proud sponsor of Expect Miracles and their ongoing, vital efforts to fund research and patient care in the fight against cancer.

We are honored to support the Foundation in its mission to find a cure for cancer and hope that together, we can continue to effect positive change for cancer patients, survivors, and their families.

Sincerely,

Bobbie Jo Pippin-Arndt

Senior Relationship Manager
Investment Management

Jane Mancini

Global Head of Business Development
Securities Services and Digital

Upcoming Events

New York YPEM Cornhole Classic
June 25, 2024 | Chelsea Piers Field House, New York, NY

NYSE Impact Celebration
June 26, 2024 | New York Stock Exchange, New York, NY

Boston YPEM Cornhole Classic
August 20, 2024 | 90FS, Boston, MA

Atlantic Coast Classic Golf Tournament
September 30, 2024 | Fiddler's Elbow Country Club, Bedminster, NJ

New York YPEM Battle of the Bartenders
October 23, 2024 | Tailor Public House, New York, NY

Expect Miracles in Boston Cocktail Gala
November 14, 2024 | Intercontinental Hotel, Boston, MA



The Expect Miracles Discovery Fund

Investing in Life-Saving Cancer Research

Expect Miracles Foundation directs its support to the heart of Dana-Farber Cancer Institute's revolutionary research and development model, the Robert and Renée Belfer Center for Applied Cancer Science.

Using a collaborative research approach that brings together resources from academia and the biomedical industry, the Belfer Center is leading the way in translating today's science into tomorrow's targeted therapies more quickly than ever, bringing new hope to cancer patients.

With your support, the Belfer Center:

- Has identified novel targets for drugs
- Is identifying strategies to overcome resistance to existing treatments
- Built less invasive blood-based tests that help match drugs to address resistance as it develops
- Built novel models based on DFCI patient tumors (including tumors that have become resistant to existing therapies) that are being used to prioritize which drugs and combinations should be evaluated in patients

"Expect Miracles Foundation's support has enabled us to move in directions that we couldn't before"

Pasi Jänne, MD, PhD, Scientific Director of the Belfer Center



Belfer Institute

FOR APPLIED CANCER SCIENCE

Board of Directors

Frank Strauss - *Founder & Chairman*

Christine Chigounis - *Bank of America Merrill Lynch*
Michael Collins - *Broadridge Financial Solutions*
Anne Duduch - *SS&C*
Amy Fisher - *Touchstone Investments*
Briana Fisher - *First Eagle Investments*
Mike Foutes - *State Street*
Matt Goulet - *Fidelity*
Justin Hansen - *MFS Investment Management*
Clint Harris - *Invesco*
Domenic Ionadi - *Confluence*
Kevin Johnson - *Allspring Global Investments*
Thom Jones - *Columbia Threadneedle Investments*
Chris Kowilcik - *J.P. Morgan*
A.J. Leimenstoll - *Eaton Vance*
Trip Lilly - *PIMCO*
John Lunny - *Vestmark*
Gary Enos - *Vice Chairman of the Board*
Jane Mancini - *BNY Mellon*
Steve Margolis - *DFIN*
Marie McCarthy
Andy McFetridge - *John Hancock Investment Management*
Sherry Moreland - *BetaNXT*
Kelli O'Brien - *Citi*
Jon Parisi - *ICE*
Kirsten Pickens - *FS Investments*
Bobbie Jo Pippin-Arndt - *BNY Mellon*
Leah Richie - *DWS*
David Rosen - *Morgan Stanley*
Traci Simpson - *UBS*
Mike Small - *Akkodis*
Luci Strauss-Garren - *Goldman Sachs*
Wendy Strutt - *PGIM Investments*

Director Emeritus

Ed Addvensky - *ICE Data Services*
Tom Bagley - *EY*
Sandy Bolton - *Ameriprise Financial Services*
Cindi Boudreau - *Computershare (retired)*
Scott Brady - *Columbia Threadneedle Investments*
Keith Brown - *Accenture (retired)*
Stephen Clarke - *Eaton Vance*
Jeffrey Cooper - *Reis Cooper LLP*
Jeff Duckworth - *John Hancock Investment Management*
Robert Eaton - *BondBloxx Investment Management*
Terence Faherty - *TRG Screen*
Margaret Flynn-Martin - *Morgan Stanley*
Kaela Gibbons - *PIMCO*
Christine Gill - *BNY Mellon*
Mark Heckert - *ICE*
Ben Huneke - *Morgan Stanley Wealth Management*
William Jackson - *Computershare*
Mike Keenan - *MFS Investments Management*
Jim Keenan - *Citi*
Mike Kerrigan - *Accenture*
Stephen Kraunelis - *Compass*
Rich Lenihan - *Bank of America (retired)*
Kevin MacNeil - *DFIN (retired)*
David Martocci - *Citi*
Todd Moyer - *Confluence*
Nick Nichols - *Di Costa Partners*
Jim Nolan - *Citi*
Lisa Onorato - *J.P Morgan (retired)*
John Pavese - *New York Life Investment Management*
Shaun Real - *EY*
Harvey Rosen - *Fidelity Investments (retired)*
Barry Seigerman - *Bradford-Miller LLC*
Brian Shlissel - *J.P. Morgan Asset Management*
Bruce Speca - *John Hancock (retired)*
Irene Speridakos - *BNY Mellon*
Ken Starr - *ICE Data Services*
Eileen Storz-Salino - *Eaton Vance*
Pete Thatch - *Capital Group*
Paul Tillotson - *Fiduciary Trust (retired)*
Lynette Turner - *BNY Mellon*
Rheeta Wise - *MFS Investments*

Honorary Directors

John Dennis - *WEEI (retired)*
Nancy Rowe - *Jimmy Fund Golf (retired)*
Samantha Watson - *Samantha Watson Consulting*

We lovingly remember our late Board Members & Expect Miracles Foundation supporters

Chris Billings
Marion Bowman
Erin Brenner
Patrick Campbell
Greg Cannon
Don DeMarco
Julie Devereaux
Lesley Duffy
Debralee Goldberg
Charles Hallac
Steve Katzin
James Kiernan
George Kozakis
Julio Lugo
Lonnie MacDonald
Kelly Newsome
Paula Pearlstein
Michael Scanlon
Brian Schmidt

Expect Miracles Award

Awarded in memory of Steven Katzin, co-founder of Mutual Funds Against Cancer. This award recognizes an extraordinary individual whose commitment to donate or raise critical funds for Expect Miracles Foundation brings hope to those impacted by cancer.

Past Recipients

2024 - **Christine Chigounis**, *Bank of America Merrill Lynch*

2023 - **Brian Kelley**, Putnam Investments

Sandy Bolton, *Ameriprise Financial Services*

2022 - **Stephen Clarke**, *Eaton Vance*

Margaret Flynn-Martin, *Morgan Stanley Wealth Management*

2021 - **George Kozakis**, *Broadridge*

2020 - **Sandy Bolton**, *Merrill Lynch*

Brett Davenport, *BMD Leadership Institute*

Jeff Duckworth, *John Hancock Investment Management*

Sean Farley, *John Hancock Investment Management*

Ben Huneke, *Morgan Stanley Wealth Management*

Andy McFetridge, *John Hancock Investment Management*

Chuck Ranney, *Ameriprise*

2019 - **Neil Hennessy**, *Hennessy Funds*

2018 - **Scott Brady**, *Columbia Threadneedle*

Jeff Duckworth, *John Hancock Investment Management*

2017 - **Terence Faherty**, *Broadridge*

Michael Collins, *Broadridge*

Jeff Masom, *Legg Mason*

2016 - **Kevin MacNeil**, *DFIN*

Kim Mustin, *BNY Mellon*

2015 - **Maureen Leary-Jago**, *MFS*

Terri Labrecque, *BNY Mellon*

2014 - **Nick Nichols**, *Keane*

2013 - **Lonnie Macdonald**, *UMB*

2012 - **Ken Poudrier**

Paul Timmins

2011 - **Anothony Kraunelis**

2010 - **Jay Keeshan**, *Management Practice*

2009 - **Ken Starr**, *Interactice Data Corp.*

2008 - **Stan Bornstein**, *DiBona, Bornstein & Random*

2007 - **Brian Schmidt**, *BlackRock*

2006 - **Bruce Speca**, *John Hancock Financial*

2005 - **John Dennis**, *WEEI Radio*

Jim Keenan, *State Street Corp.*

2004 - **Bruce Speca**, *John Hancock Financial*

2003 - **Alan Fish**, *Ernst & Young*

2002 - **Lisa Onorato**, *JP Morgan Chase*

Foundation Award

Presented in recognition of a company's outstanding commitment to Expect Miracles Foundation in leading the financial industry in the noble fight against cancer.

Past Recipients

2024 - **SS&C**

2023 - **John Hancock Investment Management**

2022 - **Columbia Threadneedle Investments**

2020 - **J.P. Morgan**

2019 - **BNY Mellon & Eagle Investment Systems**

2019 - **Confluence**

2018 - **Eaton Vance Management**

2017 - **State Street**

2016 - **Interactive Data**

Judy Award

Inspired by Judy Strauss, the original volunteer, this award honors an individual who best embodies Judy's spirit of altruism and unwavering dedication to Expect Miracles Foundation.

Past Recipients

2023 - **Kevin Johnson**, *Allspring*
Kate Richman, *Gainsight*
Katherine Ullucci, *Allspring*
2022 - **Jeff Kenney**, *Assette*
Allison Saloy, *Neuberger Berman*
2021 - **Karen Campanale**, *Confluence*
Gary Casagrande, *Confluence*
2019 - **Nancy Harrington**, *BNY Mellon*
Rupert Thomas, *BNY Mellon*
2018 - **Kelly Newsome**, *ConnectRoot*
Tony Stuart, *Bank of America*
2018 - **Judy Strauss**

Lonnie Award

Inspired by the humble yet determined spirit of Lon Macdonald, the Lonnie Award honors an individual whose passion advances the life-saving mission of Expect Miracles Foundation.

Past Recipients

2024 - **Kaela Gibbons**, *PIMCO*
Brian Shlissel, *J.P. Morgan*
2023 - **Ed Addvensky**, *ICE*
Mark Heckert, *ICE*
Todd Moyer, *Confluence*
2022 - **Tom Bagley**, *EY*
John Pavese, *New York Life Investments*
Irene Speridakos, *BNY Mellon*
2021 - **Brandon Anderson**, *SS&C*
2019 - **Paul Torre**, *AST Fund Solutions*
2017 - **Cathy-Jo Reed**, *J.P. Morgan*
2016 - **Seyfarth Shaw LLP**
2015 - **Kevin Caravella**, *Boston Financial*
Karan McClimans, *T. Rowe Price*
2014 - **Lisa Onorato**, *J.P. Morgan*
2013 - **Paul Tillotson**, *Fiduciary Trust*
2012 - **Eileen Storz-Salino**, *Eaton Vance*
2010 - **Paul MacLellan**
2009 - **Doug Quagliaroli**
2008 - **Nancy Stokes**
2007 - **Cindy Boudreau**
2006 - **Don DeMarco** (1945-2005)
Ken Michaud
2005 - **Kevin Welby**
2004 - **Chris Lacey**
2003 - **Gary Enos**
Jeff Tompkins
2002 - **Steve Katzin**
2001 - **Paula Pearlstein**
2000 - **Gerald Roche**

Strauss Lifetime Acheivement Award

Established in honor of Frank Strauss, the Founder of Expect Miracles Foundation, this award is given in recognition of individuals who, throughout their career, have impacted countless lives with their vital and unwavering support of Expect Miracles Foundation.

Past Recipients

2022 - **Samantha Watson**

2019 - **Gary Enos**
Frank Strauss, *Accenture*

YPEM Award

In recognition of a young professional whose exceptional commitment ignites the next generation of leaders to support the life-saving mission of Expect Miracles Foundation.

Past Recipients

2024 - **Nameeta Kamath Baxter**, *Morgan Stanley*

2023 - **Melaina LaSalle**, *Mastercard*
Mario Reto, *Ampersand Capital Partners*

2020 - **Shannon Cullinane**, *John Hancock Investment Management*
Melissa McNeillie, *John Hancock Investment Management*

2019 - **Luci Strauss-Garren**, *Goldman Sachs*

2018 - **Matt Collins**, *Morgan Stanley*
Chelsea Gavitt, *IR&M*

2017 - **Matt Mackay**, *J.P. Morgan*
Kate Richman, *FRT*
Brian Rudenauer, *State Street*

2016 - **Ashley Gregory**, *Sapient Global Markets*

2015 - **Charles Goodman**, *State Street*

Become a Miracle Maker

Expect Miracles Foundation is proud to recognize the community of Miracle Makers whose annual leadership gifts advance our mission and impact. These individuals make a yearly commitment to fund life-saving cancer research while advancing the financial and emotional health of people impacted by cancer.

Hope Circle
Gifts of $25,000+/yr

President's Circle
Gifts of $3,000+/yr

Founder's Circle
Gifts of $10,000+/yr

Leadership Circle
Gifts of $1,000+/yr

Chairman's Circle
Gifts of $5,000+/yr

Young Professionals
(age 21-39)
Gifts of $500+/yr

Corporate matching gifts are eligible to elevate membership above the Leadership Circle. For more information on how you can be a Miracle Maker and make a personal difference in the fight against cancer, please contact:

Maggie Dombroski, Director of Development:
P: 814.241.4431 | E: maggie@expectmiraclesfoundation.org

Miracle Makers *List updated 5.6.2024*

Founder's Circle - Gifts of $10,000+ per year

Stephen Clarke
Eaton Vance

Christopher Debiase & Hilary Moffett

Jeffrey Duckworth
John Hancock Investment Management

Mark Grand
Grand & Grand

Mark Heckert
ICE

Neil Hennessy
Hennessy Funds

Sharon Karsten
GemShares

Edward Kerschner
Columbia Threadneedle

Terry Metzger
SS&C (retired)

Matthew Ramer
MOR Wealth Management

Chairman's Circle - Gifts of $5,000+ per year

Ed & Amanda Addvensky

Thomas Bagley
EY

Scott Couto

Raymond D'Arcy
Interactive Data (retired)

Mike Dougherty
Morgan Stanley

Gary & Peggy Enos

Mark Evans
Confluence

Larry Fahey
Morgan Stanley

Tom & Winnie Faust

Michael Foutes
State Street

Domenic Ionadi
Confluence

Christine James
Allspring Global Investments

Carl Katerndahl
First Eagle Investments

Michael Keenan
MFS

Stephen & Linda Kraunelis

Lisa LaSalle
Coldwell Banker Real Estate

A.J. Leimenstoll
Eaton Vance

John Lunny
Vestmark

Steven & Jenifer Margolis

Marie McCarthy

Peter & Beth McKeon

Stephanie Meadows

Michael Messinger
Redwood Investment Management

Matt O'Connor
Capital Group

Harvey Rosen
Fidelity (retired)

James Ross
SSGA (retired)

Brian Shlissel
J.P. Morgan Asset Management

Mike Small
Akkodis

Frank Strauss
Beacon Analytics

Joe Sullivan
Allspring Global Investments

Martin Sullivan
State Street (retired)

Miracle Makers *continued* *List updated 5.6.2024*

President's Circle - Gifts of $3,000+ per year

Neil Bathon
FUSE Research Network LLC

Sandy Bolton
Ameriprise Financial Services

Scott Brady
Columbia Threadneedle

Keith Brown
Accenture (retired)

Keelie Bruce

Greg Carr
Ameriprise Financial Services

Tom Clark
Nuveen

Jeffrey Cooper
Reis Cooper

Alexander Csik
Goldman Sachs

Robert Eaton
BondBloxx

Terence Faherty
Confluence

Jon Gezotis
Mercer

Kaela Gibbons
PIMCO

Laura Giesler
ICON Clinical Research

Gregory Hall
PIMCO

John Kenney
Allspring Global Investments

Michael & Mary Kerrigan

Chris Kowilcik
J.P. Morgan

Rich Lenihan
Bank of America (retired)

Trip Lilly
PIMCO

Kevin MacNeil
DFIN

Dave & Diana Martocci

Jeff & Elizabeth Masom

Andy & DeAnna McFetridge

Dianna McNeish
Howell & Minchello LLP

Sherry Moreland
BetaNXT

Todd Moyer
Confluence

Peter O'Toole
Fidelity National Information Services, Inc.

John Parisi
ICE

Bobbie Jo Pippin-Arndt
BNY Mellon

Mario & Sarah Reto

David Rosen
Morgan Stanley

Andrew Schlueter
Voya Investment Management

Barry & Susan Seigerman

Traci Simpson
UBS

Bruce & Gail Speca

Irene Speridakos
BNY Mellon

Ken Starr
ICE

Eileen Storz-Salino
Eaton Vance

Luci Strauss Garren*
Goldman Sachs

Leadership Circle - Gifts of $1,000+ per year ($500 Young Professionals*)

Jennifer Abate
Lazard Asset Management

Richard Aftanas

Isabelle Ahl*
John Hancock Investment Management

Brooke Alam

Todd Albaum

Karen Alberthal

Bruce Alpert
Gabelli Funds LLC

John Alshefski
SEI

Erika Alter
FundGuard

Brandon & Sue Anderson

Eric Augustyn

Rich Babineau
BetaNXT

Brad & Wendy Baker

Michelle Bender
Potomac Financial Consultants

Abagail Benham
John Hancock

Stacy Bernstein
American Century Investments

Janet Bienkowski
MFS Investment Management

Kevin Blake

Dan Boever
Dan Boever Entertainment

Cindi Boudreau
Computershare

Chris Bradford
Goldman Sachs

Deirdre Bradley
Conduent

Dan Bradley
AEW Capital Management

Jim Bumpus
Columbia Threadneedle

Chris Bunker
Franklin Templeton

Gary Calmia

Wendy Campbell
Columbia Threadneedle Investments

Jim Campbell

Bob Cantey
Nuveen

Gary Casagrande
Northern Trust

Christine Chigounis
Bank of America Merrill Lynch

John Clare
Mutual of America Financial Group

Jessica Clark

Christine Collins
Allspring Global Investments

Michael Collins
Broadridge

Brett Condron

Mark Coneeny
Franklin Templeton

Ross Connell
Fidelity Investments

Shawn & Kim Correia

Nicholas Cortese*
Morgan Stanley

Marc Costantini
Manulife Investment Management

Shannon Cullinane*
Merrill Lynch

Patricia Currey
Robert M. Currey & Associates, Inc.

Stephen Dane
PGIM Investments

Brett & Joanne Davenport

Brianna Day*
EY

JoAnn DeCesaris

Adriana Destefanis*
John Hancock Investment Management

Jeffrey Dickin
John Hancock Investment Management

Maggie Dombroski*
Expect Miracles Foundation

Anne Duduch
SS&C

Steve Duncan
J.P. Morgan

Mick & Angela Edwards

Richard Ernesti
Citi

Christopher Evans
Confluence

Sean Farley
John Hancock Investment Management

Miracle Makers *continued* *List updated 5.6.2024*

Leadership Circle - Gifts of $1,000+ per year ($500 Young Professionals*)

Pat Feigley
PIMCO

Joe Feloney
Thornburg Investment Management

John Ferrick
VanEck

Briana Fisher
First Eagle Investments

David Fisher
PIMCO

Amy Fisher
Touchstone Investments

Scott FitzGerald
State Street (retired)

Zach Flechtner
John Hancock Investment Management

Margaret Flynn-Martin
Morgan Stanley

Pat Foley
Allspring Global Investments

Madeline Forrester

Jay Fortuna
Invesco

Hatherly Foster*
Dane Street

Carla Fuller
Allspring Global Investments

Ellen Furlong
BNY Mellon

Chris Fuschillo
John Hancock Investment Management

Justin Garren*
Bread Financial

Carol Geremia
MFS Investment Management

Kenny Gersh
J.P. Morgan

Brendan Gill
PGIM Investments

Christine Gill
BNY Mellon

Christopher Goff
Columbia Threadneedle

Brendan Good
Fidelity Investments

Matt Goulet
Fidelity Investments

Kelli Grady
John Hancock Investment Management

Kristin Greeley
Columbia Threadneedle

Bern & Cindy Haan

Bill Hall

Greg Hall

Damian Handzy
Confluence

Justin Hansen
MFS Investment Management

Nancy Harrington
BNY Mellon

Clint Harris
Invesco

John Hartnett
State Street

Frank Heavey
Expect Miracles Foundation

Vishal Hindocha
MFS Investment Management

Christpoh Hofmann
Alger

Ben Huneke
Morgan Stanley

Heather Hunt-Ruddy
Wells Fargo

Kristy Ives
Goldman Sachs

William Jackson
Computershare

Brian Jacobs
Jacobs Children's Charitable Foundation

Rachel Jacobs Antonaccio
AMG

Daniel Janis

Jim Jessee

Kevin Johnson
Allspring Global Investments

Eric Johnson
DFIN

Thomas Jones
Columbia Threadneedle

Rich Joseph
Mercer

Kara Julian
Morgan Stanley

Adam Kacamburas
ICE

Nameeta Kamath Baxter*
Morgan Stanley

Lisa Kasser

Leadership Circle - Gifts of $1,000+ per year ($500 Young Professionals*)

Brian Kelley
Franklin Templeton

Hugh Kelly
Harbor Capital Advisors, Inc. (retired)

Melissa Kennedy
BNY Mellon

Jeff Kenney
Confluence

Carol Kenney

Anne Kinsman

Patricia Koschik

Andrew & Tricia Kramer

James Kraunelis*
PwC

Christoph Krey*
J.P. Morgan

Steve Lack

Melaina LaSalle*
Mastercard

Mark Lavan
Franklin Templeton

Daniel Lee
Invesco

Brett Lincoln
DFIN

Mike Ludwin
Infinex Financial Group

Matt Mackay
J.P. Morgan

Brian MacPhee
Computershare

Joseph Malone
First Eagle Investments

Jane Mancini
BNY Mellon

Ann Manion
Expect Miracles Foundation

Billy Martin
John Hancock Investment Management

Christine Mattone
Citi

Joseph Mazalewski
ICE

Andrew McCarten

Karan McClimans
T. Rowe Price

Tim McGowan
Fidelity Investments

Paul & Jill McKeon

Kate McKinley
Allspring Global Investments

Mike McLaughlin
Wells Fargo

Diane McLoughlin
FundGuard

Melissa McNeillie*
Manulife Investment Management

Jeannie & Cliff Meijer

Melda Mergen
Columbia Threadneedle

David Michaud
Eaton Vance

Ann Miletti

Robert Milliman
Confluence

John Moninger
Allspring Global Investments

David Moore
Confluence

Blake Moore
Touchstone Investments

Nathan Morrison

Shannon Myatt
DFIN

Fred Naddaff
Symmetry Panoramic Trust

Denise-Marie Nakamura

Amit Nanavati
EY

Rick Nathanson
Nathanson and Company

Michael Naughton
Lord Abbett

Nick Nichols
Morrow Sodali Fund Solutions

Michelle Nicoletta
ICE

Jim & Judy Nolan

George Norcross
Columbia Threadneedle

Kelli O'Brien
Citi

Mark O'Brien
Confluence

Kelly O'Donnell
Investment Company Institute

Lisa Onorato
J.P. Morgan (retired)

William Park

Miracle Makers *continued* *List updated 5.6.2024*

Leadership Circle - Gifts of $1,000+ per year ($500 Young Professionals*)

Susan Parsons

Carolyn Pasek
DFIN

Tim Paulin
Touchstone Investments

John Pavese
NYL Investments

Kirsten Pickens
FS Investments

Kara Ploski*
ICE

May Poon
Alger

Patrick Prato
Boyd Watterson

Brian & Lynette Quinn

Charles Ranney
Ameriprise Financial Services

Shaun Real
EY

Janina Repetto

Kate Richman*
Ceres

Leah Ritchie
DWS

Noah Rogers
DFIN

Edward Ross
ICE

Jassi Sandhu
ICE

Phil Schachter

Andrew Schoelkopf

Brandon Sexton
John Hancock Investment Management

Sachin Shah
55ip

Tracy Shelby
SS&C

Jennie & Andrew Sheridan

Keith Slattery
J.P. Morgan

Phil Sloan
Sports Concierge Group

Steve Solomon

Malcolm Sparks
JUXT

Rick Spear
Simon-Kucher

Kurt Spero
Old Farm Partners

Jeff Sprecher

Sallie Squire
Allspring Global Investments

Kelly Stead
ICE

Laura Steinbach
BNY Mellon

Wendy Strutt
PGIM Investments

Amy Stueve
Allspring Global Investments

Valerie Sun
Optum

Eric Sutherland
PIMCO

Jay Taylor*
Dimensional Fund Advisors

Eric Teschemacher*
SS&C

Peter Thatch
Capital Group

George Theodoropoulos*
J.P. Morgan

Blaine Thibodeau*
Akkodis

Kyle Thompson*
Voya Investment Management

Paul Tillotson
AFC Pensions Inc.

Paul Torre
AST Fund Solutions

Mark Towler
Phase 2

Ted & Kathy Truscott

Katherine Ullucci
Allspring Global Investments

Bryant VanCronkhite

Brian Walsh
Capital Group

Jessi Weatherl

JJ Wilczewski
DWS

Robert R. Williams

Rheeta Wise
MFS Investment Management

Jason Xanthakis

Julie Zaccaria
SimCorp

Allspring

Allspring Global Investments is proud to support the Expect Miracles Foundation's 2024 East Coast Classic.



" The most rewarding things you do in life are often the ones that look like they cannot be done.

— ARNOLD PALMER

allspringglobal.com

©2024 Allspring Global Investments Holdings, LLC. All rights reserved.

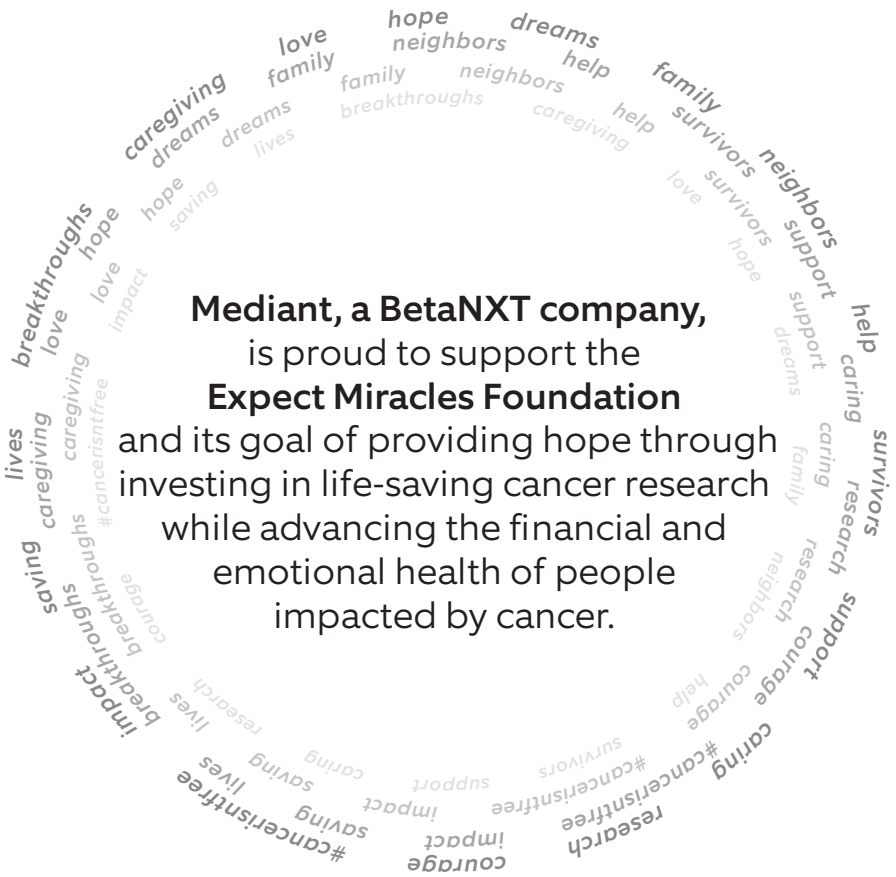

Seeking a Higher Rate of Return in Lives Improved, Dreams Reached, A World Made Better.
Investing with us means investing in a healthier world. Because 40% of our profits fund research for cures.
American Century Investments®
©2024 American Century Proprietary Holdings, Inc. All rights reserved.

ARCHER

Expect Miracles FOUNDATION



Archer is proud to support the Expect Miracles Foundation in providing life-saving cancer research and creating hope for families impacted by cancer.



Mediant, a BetaNXT company,
is proud to support the
Expect Miracles Foundation
and its goal of providing hope through investing in life-saving cancer research while advancing the financial and emotional health of people impacted by cancer.

BetaNXT | mediant



Assets travel, we have the coordinates

DISTRIBUTION ANALYTICS,
INSIGHTS AND ADVISORY SOLUTIONS

Ready for Next

Create change. Create hope.

Citi recognizes the work of Expect Miracles and those who work together to build a better tomorrow.



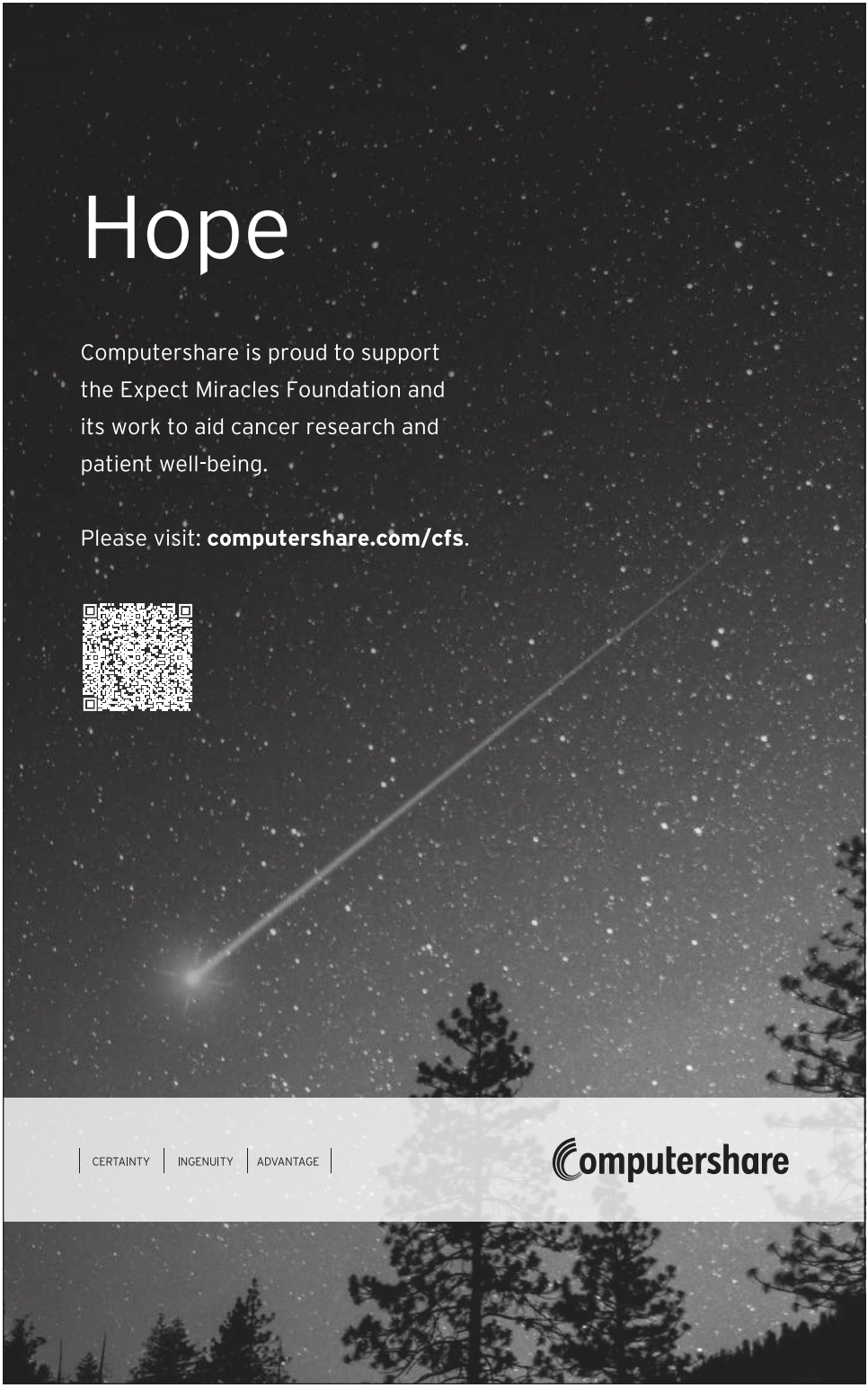
© 2019 Citigroup Inc. All rights reserved.
Citi and Citi with Arc Design are registered service marks of Citigroup Inc.

COLUMBIA THREADNEEDLE
INVESTMENTS

AT COLUMBIA THREADNEEDLE INVESTMENTS, WE MAKE YOUR SUCCESS OUR PRIORITY.

We are proud to continue to support the Expect Miracles Foundation.

Columbia Threadneedle Investments is the global brand name of the Columbia and Threadneedle group of companies.
Columbia Management Investment Distributors, Inc., member FINRA


Hope
Computershare is proud to support the Expect Miracles Foundation and its work to aid cancer research and patient well-being.
Please visit: computershare.com/cfs.
CERTAINTY | INGENUITY | ADVANTAGE
Computershare

Confluence™

Expect Miracles
FOUNDATION
Financial Services Against Cancer



"Individually, we are one drop. Together, we are an ocean."

- Ryunosuke Satoro

Confluence proudly supports the Expect Miracles Foundation's mission to bring meaningful resources to cancer research and financial and emotional assistance to people and families impacted by cancer.

SEARCH "CONFLUENCE TECHNOLOGIES"
www.confluence.com

© 2023. Confluence Technologies, Inc.



DFIN joins the Expect Miracles Foundation to picture a cancer-free future.

Donnelley Financial Solutions (DFIN) is a leading global risk and compliance company. Markets fluctuate, regulations evolve, technology advances, and through it all, DFIN delivers confidence with the right solutions in moments that matter.

DFINsolutions.com

©2024 Donnelley Financial Solutions (DFIN)









An experience you won't soon forget.

In the midst of your round, as you stroll from tee to the impeccably maintained fairway alongside your colleagues, a revelation unfolds: this is more than just a game. It's an opportunity to connect, to forge relationships that transcend the typical boardroom boundaries. Here, amidst stunning landscapes and unparalleled service, every shot, every conversation is a chance to strengthen bonds. Discover an experience where business, pleasure, and the spirit of the game converge to create unforgettable moments.

Get on the list at dormienetwork.com

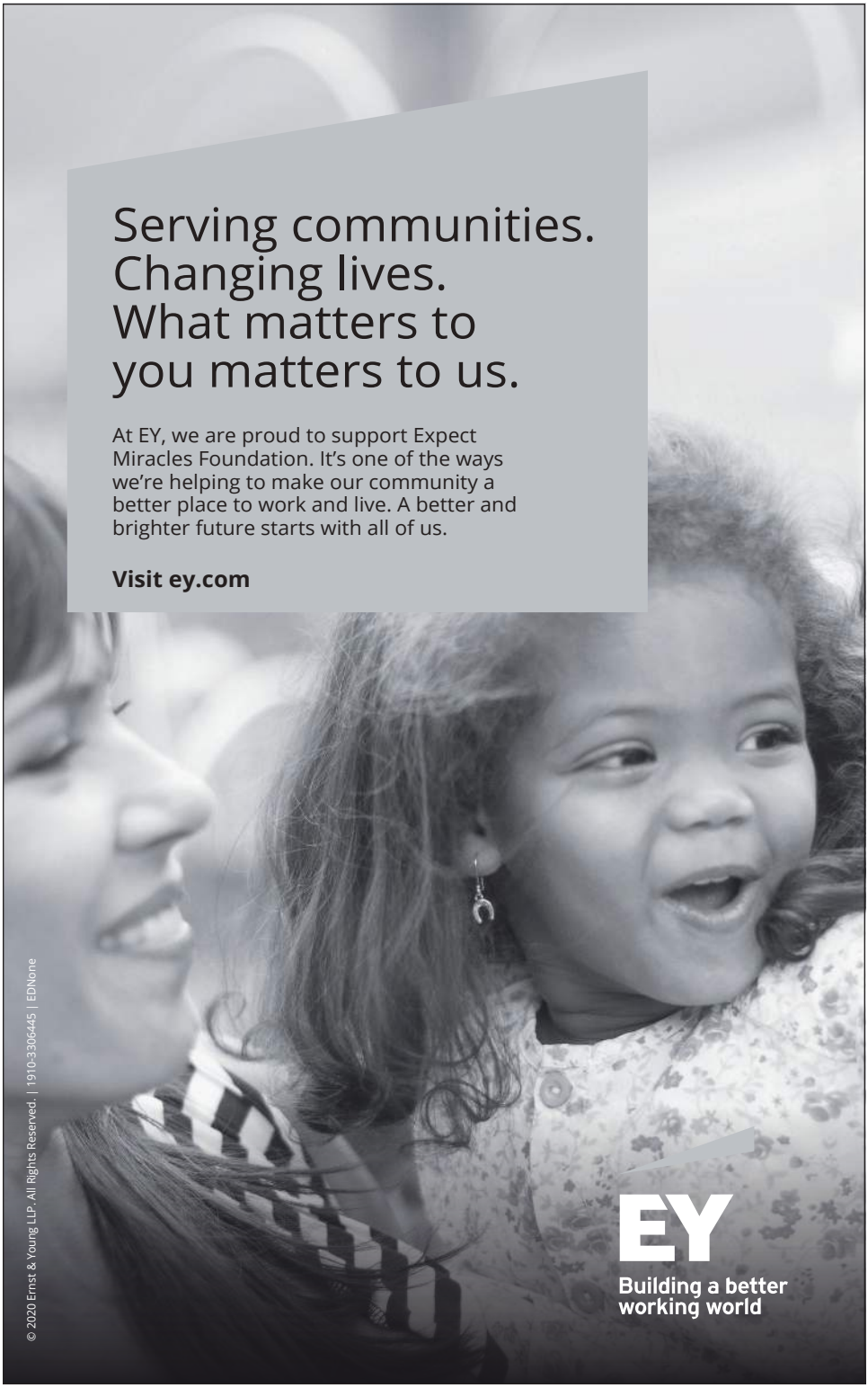
DORMIE NETWORK®
Where every club is your home club.

ArborLinks — Nebraska City, Nebraska
BALLYHACK® — Roanoke, Virginia
BRIGGS RANCH® — San Antonio, Texas
DORMIE CLUB™ — West End, North Carolina
GrayBull™ — Maxwell, Nebraska
HIDDEN CREEK® — Egg Harbor Township, New Jersey
Victoria National® — Newburgh, Indiana



Eaton Vance
is proud
to support the
Expect Miracles
Foundation.

©2024 Eaton Vance Management. Two International Place, Boston, MA 02110.
eatonvance.com


Serving communities.
Changing lives.
What matters to
you matters to us.
At EY, we are proud to support Expect Miracles Foundation. It's one of the ways we're helping to make our community a better place to work and live. A better and brighter future starts with all of us.
Visit ey.com
EY
Building a better working world
© 2020 Ernst & Young LLP. All Rights Reserved. | 1910-3306445 | EDNone

Fabrizia



SPIKED LEMONADE

LEMONS FROM ITALY

MADE IN NEW ENGLAND

FIND A STORE

FIDELITY INVESTMENTS®
is proud to support

Expect Miracles Foundation



Fidelity Investments & Pyramid Design
is a registered service mark of FMR LLC.

FIDELITY DISTRIBUTORS COMPANY LLC
500 SALEM STREET, SMITHFIELD, RI 02917

1085761.2.0

First Eagle
Investments

Disciplined, Unconventional Thinking. Global Perspective. Long-Term Alignment.

1345 Avenue of the Americas, New York, NY 10105

www.firsteagle.com

First Eagle Investments is the brand name for First Eagle Investment Management, LLC and its subsidiary investment advisers.
©2024 First Eagle Investment Management, LLC. All rights reserved

Hello progress®

Our two word philosophy.

We're committed to progress. That restless desire for better has made us the world's 6th largest independent investment firm, and is why we're developing solutions, like portfolio analytics and custom indexing, to help better serve clients. We never look backwards, we never stand still, and we'll always stand by our philosophy.

Visit franklintempleton.com/helloprogress



FRANKLIN TEMPLETON | 75 YEARS OF PROGRESS

All investments involve risk, including possible loss of principal.

© 2023 Franklin Distributors, LLC. Member FINRA/SIPC.

FUNDGUARD

FUNDGUARD PROUDLY SUPPORTS THE EXPECT MIRACLES FOUNDATION IN THEIR FIGHT AGAINST CANCER.

New Generation Investment Accounting Utility

ABOR, IBOR, NAV CONTINGENCY



Mitigate the costs and risks of multi-application legacy models



Create unparalleled scalability and operational optimization



Innovate and digitalize to differentiate the customer experience

FundGuard is driving the new era of investment management operations with an AI-powered, cloud-native, and multi-asset class operating platform for asset managers, asset owners, custodian banks and fund administrators.

Join the transformation.
Visit fundguard.com

Goldman Sachs Asset Management

gsam.com

Bringing together traditional and alternative investments, Goldman Sachs Asset Management provides clients around the world with a dedicated partnership and focus on long-term performance.

Your Performance, Our Priority.

As the primary investing area within Goldman Sachs, we deliver investment and advisory services for the world's leading institutions, financial advisors and individuals, drawing from our deeply connected global network and tailored expert insights, across every region and market—overseeing $2.5 trillion in assets under supervision worldwide as of September 30, 2023.



As of September 30, 2023. Goldman Sachs Asset Management leverages the resources of Goldman, Sachs & Co. subject to legal, internal and regulatory restrictions. Assets Under Supervision (AUS) includes assets under management and other client assets for which Goldman Sachs does not have full discretion. This material is provided for informational purposes only. It is not an offer or solicitation to buy or sell any securities.

Confidentiality: No part of this material may, without Goldman Sachs Asset Management's prior written consent, be (i) copied, photocopied or duplicated in any form, by any means, or (ii) distributed to any person that is not an employee, officer, director, or authorized agent of the recipient. © 2023 Goldman Sachs. All rights reserved. Date of First Use: February 14, 2023. 307642-OTU-1747453.



A Bermuda Classic

FOR THOSE TIMES WHEN YOU NEED TO RELAX, REFLECT AND RECHARGE



The Hamilton Princess & Beach Club is a classic, offering exceptional dining experiences, indulgent Spa therapies and exciting weekend activities. And all in the name of luxury.

Visit thehamiltonprincess.com for more information on all of our hotel offerings.

HAMILTON PRINCESS

BERMUDA

HOTEL • BEACH CLUB • MARINA

Data and technology that connect you to opportunity

Manage risk and make informed decisions with ICE's end-to-end solutions.

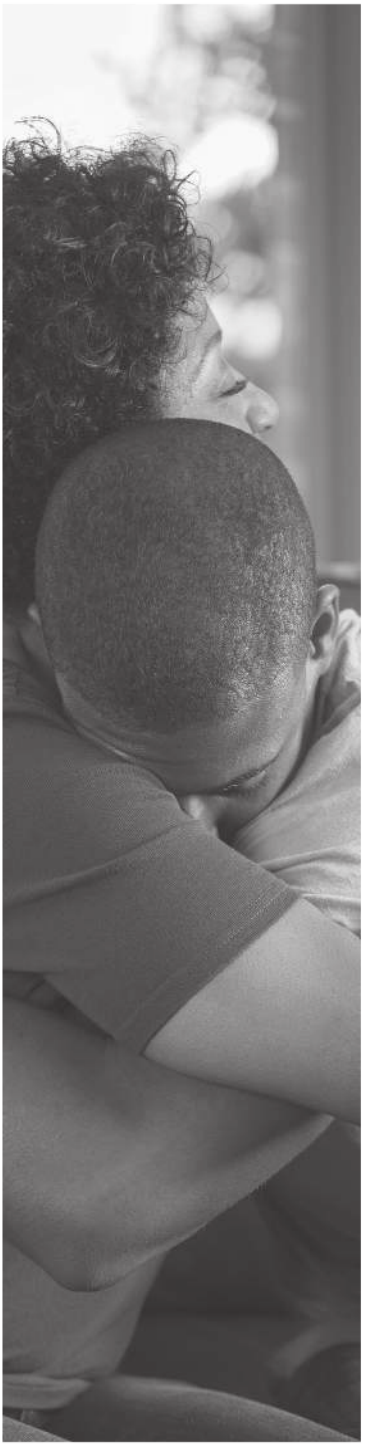
ice.com/index

Invesco

Here's to Greater Possibilities

Invesco is honored to be a supporter of the Expect Miracles Foundation and its commitment to advancing cancer research and offering aid to those affected by the financial and emotional burdens of the disease.

Expect Miracles
FOUNDATION



John Hancock
Investment Management

Coming *together* to fight cancer

John Hancock Investment Management is a proud sponsor of the Expect Miracles Foundation, which supports *groundbreaking research* into cancer and provides much-needed financial assistance to those recovering from treatment.

Expect Miracles
FOUNDATION
Financial Services Against Cancer

Manulife, Manulife Investment Management, Stylized M Design, and Manulife Investment Management & Stylized M Design are trademarks of The Manufacturers Life Insurance Company and are used by it, and by its affiliates under license.

A company of Manulife Investment Management

J.P.Morgan

J.P. Morgan proudly supports the
Expect Miracles Foundation.

We are honored to join you in the
fight to tackle cancer.

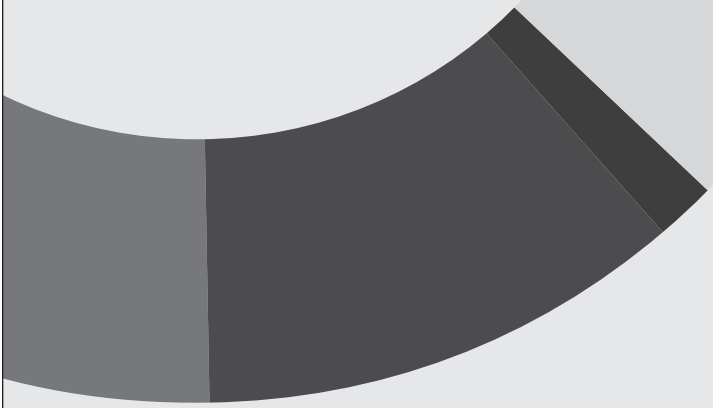
jpmorgan.com



© 2024 JPMorgan Chase & Co. All rights reserved.

Research empowers better lives

J.P. Morgan Asset Management is proud to support cancer patient care initiatives and research.



J.P. Morgan Asset Management is the marketing name for the asset management businesses of JPMorgan Chase & Co., and its affiliates worldwide. © 2024 JPMorgan Chase & Co.

J.P.Morgan
Asset Management



Funding Health, Creating Hope.

MFS® is proud to support the Expect Miracles Foundation – Financial Services Against Cancer and its dedication to bringing meaningful resources to cancer research and advance care programs

mfs.com





40590.2

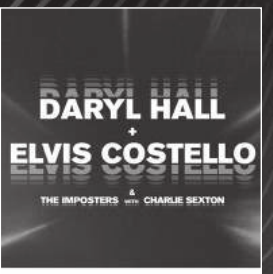
MGM MUSIC HALL
FENWAY



JUNE 16



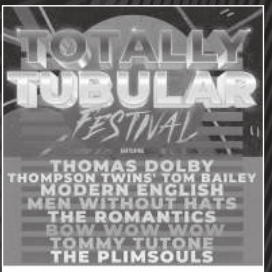
FRI. & SAT. JULY 12 & 13



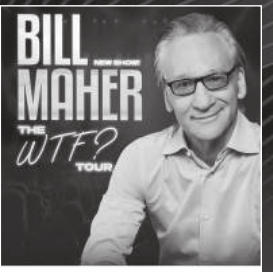
JULY 14



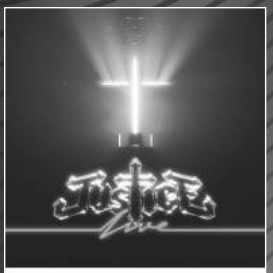
JULY 16



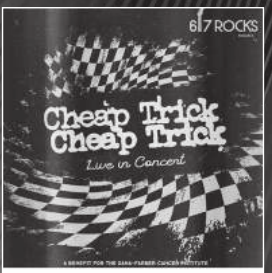
JULY 17



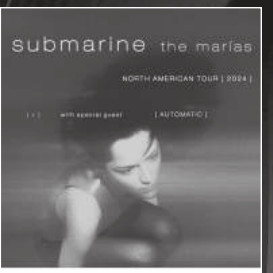
FRI. JULY 26



FRI. AUGUST 2



SAT. AUGUST 3



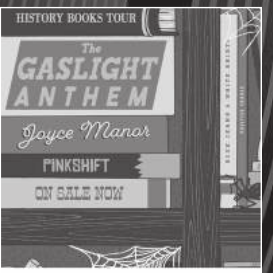
AUGUST 11



AUGUST 13



AUGUST 14



AUGUST 18

LIVE NATION

MIXED·UP
AUTHENTICALLY CRAFTED
NM US
Cocktail Co

CREATIVE CRAFT COCKTAILS.

REAL BOOZE. REAL FRUIT.



ALL-NATURAL & DELICIOUS.

SIMPLE, CLEAN INGREDIENTS.

NATURALLY VEGAN & GLUTEN FREE.



Northern Trust Asset Servicing is proud to sponsor Expect Miracles Foundation

We are proud to support Expect Miracles Foundation's commitment to aiding life-saving cancer research while advancing the financial and emotional health of people impacted by cancer. For nearly 135 years, we've been meeting our clients' financial needs while nurturing a culture that invests in the communities we serve.

FOR MORE INFORMATION
Scan the QR code or go to
northerntrust.com/gfs

NORTHERN TRUST

WEALTH PLANNING | BANKING | TRUST & ESTATE SERVICES
INVESTING | FAMILY OFFICE



PGIM INVESTMENTS

PGIM INVESTMENTS is proud to support

EXPECT MIRACLES FOUNDATION

We commend you and our Financial Services partners in the fight against cancer.


scp
HILO
HOTEL
Every stay at Soul Community Planet comes with the joy of making the world a better place.
Through the Pristine Makai program, every stay at SCP Hilo Hotel supports Hawai'i Wildlife Fund's efforts to keep the Island's beaches magnificent and pure. Learn more about how Every Stay Does Good at scphotels.com.



SEI is proud to support

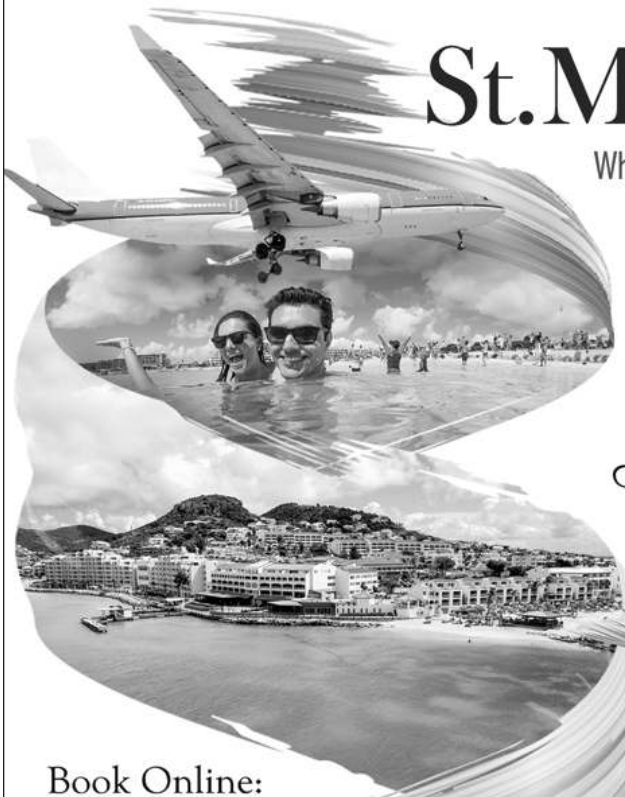
Expect Miracles Foundation.

FINANCIAL SERVICES AGAINST CANCER

Delivering technology and investment solutions that connect the financial services industry

Corporate Headquarters
1 Freedom Valley Drive
P.O. Box 1100
Oaks, PA 19456
+1 610 676 1270





St.Maarten

Where sun-kissed sands
meet unforgettable
Summer Moments!

Simpson Bay
RESORT, MARINA & SPA

Book Online:

SCAN ME

CONTACT US AT:

1-888-721-4407

+52 9987588542

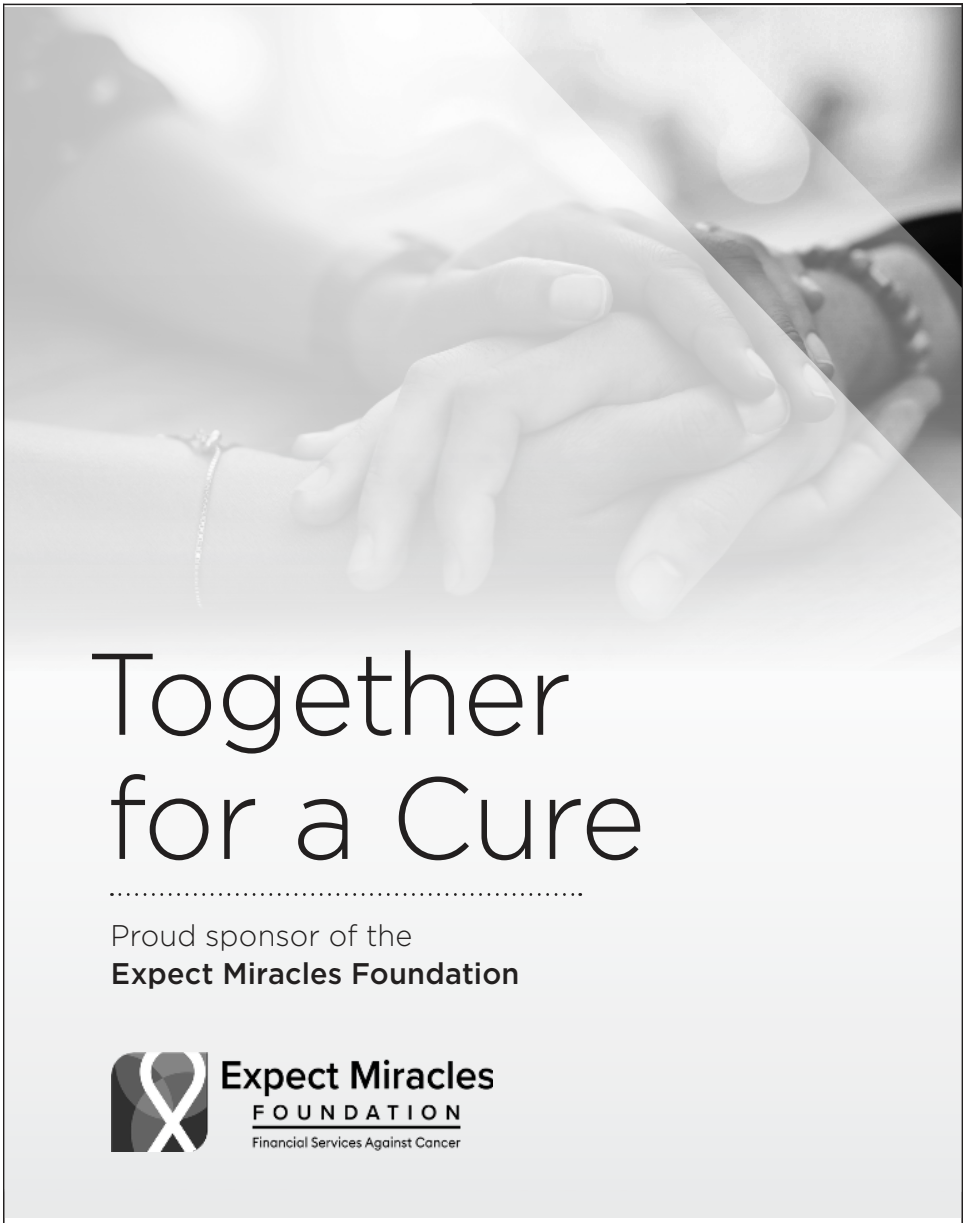
SBRreservations@simpsonbayresort.com

Visit www.simpsonbayresort.com



Proud sponsor:
Expect Miracles
Foundation

ssctech.com



Together for a Cure

Proud sponsor of the
Expect Miracles Foundation

Expect Miracles
FOUNDATION
Financial Services Against Cancer

ssctech.com

SS&C

STATE STREET

We are proud to sponsor the

Expect Miracles Foundation

Engaging with our communities around the world goes far beyond financial support. We believe giving back is an investment in the future.

statestreet.com

LOVE, Tito's®

TURNING SPIRITS INTO LOVE AND GOODNESS

"Spread some joy. Spread some love."

-Tito

If you would like to request support for an upcoming program or event for a **501(c)(3)** organization, please fill out a donation request form at ***titosvodka.com/donation*** to get started.

• **TitosVodka.com** • **Crafted to be savored responsibly.** DISTILLED & BOTTLED BY FIFTH GENERATION INC. AUSTIN, TEXAS 40% ALC./VOL. ©2023 TITO'S HANDMADE VODKA.

T.RowePrice

Thrive in an evolving world.

As a leading global active manager, we identify market risks and opportunities so you and your clients can feel confident in the face of change.

Learn More
troweprice.com/advisor



T. Rowe Price Investment Services, Inc.
© 2024 T. Rowe Price. All Rights Reserved.
T. ROWE PRICE, INVEST WITH CONFIDENCE, and the Bighorn Sheep design are, collectively and/or apart, trademarks of T. Rowe Price Group, Inc.

CCCN0170053
202312-3266464



Rigorous Processes. Robust Portfolio Construction. Active Strategies.

Touchstone Investments is proud to support the

Expect Miracles Foundation

Touchstone Investments®

DISTINCTIVELY ACTIVE®

For more information about a Fund, contact Touchstone Investments at 800.638.8194 or visit TouchstoneInvestments.com

Please consider the investment objectives, risks, charges and expenses of the fund carefully before investing. The prospectus and the summary prospectus contain this and other information about the Fund. To obtain a prospectus or a summary prospectus, contact your financial professional or download and/or request one at TouchstoneInvestments.com/resources or call Touchstone at 800.638.8194. Please read the prospectus and/or summary prospectus carefully before investing.

Investment products offered are not FDIC insured, may lose value and have no bank guarantee.

Touchstone Funds are distributed by Touchstone Securities, Inc.*

*A registered broker-dealer and member FINRA and SIPC

Touchstone is a member of Western & Southern Financial Group

Not FDIC Insured | No Bank Guarantee | May Lose Value

For Financial Professional Use Only – Not for Distribution to the Public

TSF-2447-2310

TRG SCREEN

OPTIMIZE

Enterprise subscriptions **optimized**



Simplify subscription management and unlock actionable insights

www.trgscreen.com


turtleson
www.turtleson.com

ULTIMUS
FUND SOLUTIONS

Ultimus proudly supports the Expect Miracles Foundation in its quest to create hope within the cancer community.

For a better today.
And a better tomorrow.



www.ultimusfundsolutions.com

© 2023 Ultimus Fund Solutions 231150SD 8.23

Vestmark is proud to support the Expect Miracles Foundation in their mission to unite the financial services community around the common goal of assisting those impacted by cancer and those working toward a cure.

Vestmark

www.vestmark.com

Wakefield, MA • Jersey City, NJ



Become a Miracle Maker

Miracle MAKER

Elevate Your Impact.

Expect Miracles Foundation is proud to recognize the community of Miracle Makers whose annual leadership gifts advance our mission and impact. These individuals make a yearly commitment to fund life-saving cancer research while advancing the financial and emotional health of people impacted by cancer.



For questions regarding the Miracle Maker program, please contact EMF's Director of Development, Maggie Dombroski, at 814.241.4431 or maggie@expectmiraclesfoundation.org.

Join YPEM

YOUNG PROFESSIONALS

ypem

Expect Miracles

Young Professionals Expect Miracles [YPEM] is a group of dedicated professionals aged 21-39, actively advancing the fight against cancer. YPEM gathers people of all ages who are committed to supporting the life-saving and life-changing mission of EMF through volunteer opportunities, fundraisers, and networking events.



For questions regarding YPEM, please contact Events & Design Associate, Lauren Beimler, at 774.266.5600 or lbeimler@expectmiraclesfoundation.org.

SPONSORS
THANK YOU

FOUNDATION SPONSOR

BNY MELLON

PLATINUM SPONSORS

SS&C

J.P.Morgan

J.P.Morgan
Asset Management

GOLD SPONSORS

Broadridge

COLUMBIA THREADNEEDLE INVESTMENTS

Eaton Vance

FRANKLIN TEMPLETON

John Hancock Investment Management

Morgan Stanley
WEALTH MANAGEMENT

STATE STREET

ICE

DFIN

SILVER SPONSORS

Allspring
Archer
BetaNXT
BlackRock
Capital Group
Citi
Computershare
Confluence
EY
FS Investments
Fidelity
First Eagle
Goldman Sachs
Invesco
Lord Abbett
MFS
New York Life
PGIM
PIMCO
SEI
T. Rowe Price
Touchstone
TRG Screen
Ultimus
Vestmark

INDUSTRY PARTNERS

Citywire
Nicsa
Seyfarth

Expect Miracles Foundation (EMF) rallies the financial services industry and beyond to invest in life-saving cancer research while advancing the financial and emotional health of people impacted by cancer.

Expect Miracles
FOUNDATION
Financial Services Against Cancer