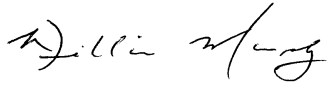





TO: The Honorable Members of the Board of Regents

FROM: William P. Murphy 

SUBJECT: Appointment and Reappointments to the New York State Teachers' Retirement System Board

DATE: March 27, 2025

AUTHORIZATION(S): 

SUMMARY

Issue for Decision (Consent)

Should the Board of Regents approve the appointment and reappointment of members to the New York State Teachers' Retirement System Board?

Reason for Consideration

Required by State statute.

Proposed Handling

This will come before the Full Board at its April 2025 meeting, where it will be voted on and action taken.

Procedural History

Appointment of certain members to the 10-member board of the New York State Teachers' Retirement System (NYSTRS) Board requires approval by the Board of Regents.

Education Law §504(2)(b) provides that:

"...Two members who are not employees of the state, each of whom shall be or shall have been a trustee or member of the board of education of a school district in this state, and at least one of whom shall be or shall have been an executive officer of an insurance company, elected by the Board of Regents of the University of the State of New York to serve for a term of three years, from a list of five or more persons having broad experience

and ability in the fields of finance and investment to be presented to the Regents by the Board of Directors of the New York State School Boards Association, Inc...”

Background Information

In accordance with the provisions of Education Law §504(2)(b), the New York State School Boards Association (NYSSBA) forwarded the names of two individuals for consideration for appointment and reappointment to the Board of Directors of the NYS Teachers’ Retirement System. The New York State Teacher’s Retirement System (NYSTRS) also forwarded the name of an individual for consideration for reappointment to the Board.

Appointment under Section 504(2)(b) of the Education Law:

NYSSBA recommends the appointment of Scott Levy. Mr. Levy is a Partner at Lynrock Lake LP and has an impressive record of experience in nonprofit government and public service. Mr. Levy meets the requirements stated in Education Law §504(2)(b) and has had over 30 years of experience in finance. He currently serves on the Byram Hills Central School District Board of Education. A copy of the NYSSBA recommendation letter is attached as Attachment A. Mr. Levy’s resume is attached as Attachment B.

Reappointments under Section 504(2)(b) of the Education Law:

NYSSBA recommends the reappointment of Jennifer Longtin whose term expires on June 30, 2025. Ms. Longtin is an insurance executive and the Owner and President of Lighthouse Insurance Agency, LLC. Ms. Longtin also serves on the Burnt Hills-Ballston Lake Central School District Board of Education. Ms. Longtin meets the requirements stated in Education Law §504(2)(b) and has had a distinguished career in the insurance industry for over 30 years, together with over 10 years of experience on the Board of Education. A copy of the letter from NYSSBA recommending Ms. Longtin is attached as Attachment A. Ms. Longtin’s resume is also attached as Attachment C.

NYSTRS recommends the reappointment of Ruth H. Mahoney. Ms. Mahoney is the President of Wealth Management and has over 30 years of experience in banking, as well as extensive experience in public service. A copy of the NYSTRS recommendation letter is attached as Attachment D. Ms. Mahoney’s resume is attached as Attachment E.

Related Regents Items

[April 2019: Appointments and Reappointments to the New York State Teachers’ Retirement System Board](https://www.regents.nysed.gov/sites/regents/files/419brca1.pdf)

(<https://www.regents.nysed.gov/sites/regents/files/419brca1.pdf>)

[April 2022: Reappointments to the New York State Teachers' Retirement System Board](https://www.regents.nysed.gov/sites/regents/files/422brca4.pdf)
(<https://www.regents.nysed.gov/sites/regents/files/422brca4.pdf>)

[October 2023: Appointment to the New York State Teachers' Retirement System Board](https://www.regents.nysed.gov/sites/regents/files/1023brca1.pdf)
(<https://www.regents.nysed.gov/sites/regents/files/1023brca1.pdf>)

[May 2024: Reappointment to the New York State Teachers' Retirement System Board](https://www.regents.nysed.gov/sites/regents/files/524brca1.pdf)
(<https://www.regents.nysed.gov/sites/regents/files/524brca1.pdf>)

[September 2024: Appointment to the New York State Teachers' Retirement System Board](https://www.regents.nysed.gov/sites/regents/files/924brca7.pdf)

(<https://www.regents.nysed.gov/sites/regents/files/924brca7.pdf>)

Recommendation

The Department recommends that the Board of Regents take the following action:

VOTED: That the Board of Regents appoint Scott Levy to the NYS Teachers' Retirement System Board pursuant to Section 504(2)(b) of the Education Law for a three-year term commencing July 1, 2025 and expiring June 30, 2028.

VOTED: That the Board of Regents reappoint Jennifer Longtin to the NYS Teachers' Retirement System Board pursuant to Section 504(2)(b) of the Education Law for a three-year term commencing July 1, 2025 and expiring June 30, 2028.

VOTED: That the Board of Regents reappoint Ruth H. Mahoney to the NYS Teachers' Retirement System Board pursuant to Section 504(2)(a) of the Education Law for a three-year term commencing May 1, 2025 and expiring April 30, 2028.

Timetable for Implementation

If approved, Ms. Mahoney's term will begin May 1, 2025 and Ms. Longtin and Mr. Levy' term will begin July 1, 2025.



Better School Boards Lead to Better Student Performance

24 Century Hill Drive, Suite 200
Latham, New York 12110-2125
Tel: 518.783.0200 | Fax: 518.783.0211
www.nyssba.org

← Rectangular Snip

March 4, 2025

The Honorable Betty Rosa
Commissioner of Education
NYS Education Department
Washington Avenue
Albany, NY 12234



Dear Commissioner Rosa:

In accordance with Section 504 of the Education Law, the Board of Directors of the New York State School Boards Association sought nominations for two seats on the Board of Directors of the NYS Teachers' Retirement System. A letter was sent to all school board members of NYSSBA member districts statewide.

A total of five people expressed an interest in being considered for appointment (see attached resumes).

On March 1, 2025, the NYSSBA Board of Directors unanimously approved a recommendation to submit the names of Jennifer Longtin, Burnt Hills-Ballston Lake School Board, and Scott Levy, Byram Hills, to the Board of Regents for appointment to the TRS Board. Both nominees meet the legal qualification criteria.

If you need additional information with regard to this matter, please do not hesitate to contact us.

Sincerely,

A handwritten signature in black ink, appearing to read "Robert S. Schneider".

Robert S. Schneider, CPA, CAE
Executive Director

Enclosures

cc: The Honorable Members of the Board of Regents
Thomas K. Lee, Executive Director, NYS Teachers Retirement System

SCOTT R. LEVY



PROFESSIONAL EXPERIENCE

LYNROCK LAKE LP

Rye Brook, NY

Partner (2022-present)

- Manage firm relationships and provide operational support for investment management firm serving primarily endowments and foundations
- Negotiate and structure contracts and transactions, conduct tax planning, and manage vendors
- Advisory board member of CalAmp Corporation (August 2024 - present)

YALE CENTER FOR EMOTIONAL INTELLIGENCE, YALE MEDICAL SCHOOL

New Haven, CT

Executive Director (2017-2021), Board of Advisors (2021-present)

- Developed self-supporting revenue model to scale and sustain RULER, an evidence-based preK-12 approach to building emotional intelligence skills that serves 3,000 schools across the world
- Lectured superintendents and school board members on leadership and systemic implementation at annual Yale education leadership program and other education forums
- Led center during a period of rapid growth. Responsibilities included foundation relations, partnerships, finance and operations, and district/school relations

KLINGENSTEIN FIELDS ADVISORS

New York, NY

Director of Private Investments (2015-16); Appointed Board Member of Healthcare Company (2017-present)

- Serve as the Klingenstein Fields designated board member of Gold Group, a cloud-based technology company focused on digital healthcare and population health
- Guided KP's review of private investment portfolio and developed a firm private equity strategy

BARCLAYS PLC / LEHMAN BROTHERS. Investment Banking Division (2001-2014)

New York, NY

Technology, Media & Telecom Group (Managing Director)

- Advised CEOs, CFOs and boards on strategic, financial and capital structure decisions
- Launched and led global information services business
- Led global team effort to provide strategic advice to clients. Executed acquisitions, divestitures, LBOs, issuances across the equity, bond, convertible, and loan markets, and risk management solutions.
- Built long term trusted relationships with clients such as Bloomberg, Thomson Reuters, Time Warner, Wolters Kluwer, KKR, and Warburg Pincus
- Served on compensation committees and as line manager. Harvard College recruiting team

J.P. MORGAN & CO. Investment Banking Division, Vice President (1994-2001)

New York, NY

Leveraged Finance, Mergers & Acquisitions, Diversity Task Force

- Originated and structured leveraged finance transactions for companies and financial sponsors across industries, including telecom, media, healthcare, chemicals, industrials and energy
- Assessed strategic alternatives for clients and executed M&A transactions
- Selected to serve a full-time rotation on JP Morgan Diversity Task Force

J.P. MORGAN & CO. Emerging Markets Trading / Global Custody, Intern (1992-1994)

New York, NY

SCOTT R. LEVY

NONPROFIT GOVERNANCE / PUBLIC SERVICE

HARVARD UNIVERSITY

Cambridge, MA

Adjunct Lecturer, Harvard Graduate School of Education (2025-present)

Visiting Fellow, Harvard Graduate School of Education (2022-2024)

Senior Research Fellow, Harvard Kennedy School of Government (2014-15)

- Teach master's program course on education governance (*A301: How School Boards Shape Education*)
- Conduct research on education policy and school board governance, history, and education finance
- Writing nonfiction book on public school governance called *Why School Boards Matter: Reclaiming the Heart of American Education and Democracy*. Expected release date is September 2025 by MIT Press

BLYTHEDALE CHILDREN'S HOSPITAL. *Chairman, Board of Trustees (2013-present)*

Valhalla, NY

- Appointed chairman in June 2020. Provide oversight, governance and leadership to specialty children's hospital serving medically fragile patients. Governed hospital through pandemic
- As former Investment Committee Chair, was responsible for oversight of assets in long-term investment portfolio, pension plan, and capital fund; led effort to revamp investment policies
- Serve on Executive, Finance, Audit, Compensation, Investment, and Nominating Committees
- Co-chair CEO search committee
- Honoree at annual gala (November 2024) for distinguished service

WESTCHESTER PUTNAM SCHOOL BOARDS ASSOC. *President, Board Member, Ex Officio (2017-present)*

- As former president, provided oversight and leadership to organization responsible for training and educating school board members across 54 districts
- Led efforts to develop advocacy agenda and maintained relationships with state and local leaders
- Received Distinguished Service Award (June 2024)

BYRAM HILLS BOARD OF EDUCATION. *School Board Member (2015-present)*

Armonk, NY

- Elected four times (three-year terms) to public school district board. Served as Board President for three years and VP for two years
- Responsible for policies, fiscal oversight (\$100+ million budget), leadership and governance
- Served on Audit, Policy, and Finance Advisory Committees. Emergency Safety Team member. Town Government Liaison. NYS School Boards Association Annual Business Meeting Delegate. Liaison to PTSA and local education foundation

BYRAM HILLS EDUCATION FOUNDATION. *Chair, Board Member, Liaison (2010-present)*

Armonk, NY

- As Chairman (2013-15), led organizational effort to support innovative initiatives in public schools
- Initiated directed giving program and cultivated donor relationships
- Coordinated large team of community members, administrators and teachers
- Currently serve as Board of Education liaison to the Foundation

LOWER HUDSON EDUCATION COALITION. *Steering Committee (2020-2022)*

Harrison, NY

- Helped govern coalition that serves as regional leadership hub for public education advocacy
- Developed and executed a cohesive advocacy agenda that represents 77 districts (239,000 students)

NYS SCHOOL BOARDS ASSOCIATION. *Investment Advisory Committee (2021-present)*

SCOTT R. LEVY

NYS EDUCATION DEPARTMENT TASK FORCE ON REOPENING SCHOOLS. *Task Force Member (2020)*

HARVARD ALUMNI ASSOCIATION BOARD OF DIRECTORS. *Board Member (2021-2024)*

HARVARD ALUMNI ASSOCIATION COMMITTEE TO NOMINATE OVERSEERS AND ELECTED DIRECTORS.

- Committee member (Term began July 2024)

HARVARD-RADCLIFFE CLUB OF WESTCHESTER. *Board Member (2010-present), served as Co-President*

- Member of the Schools & Scholarships Committee (interview high school students for Harvard College)

HARVARD COLLEGE FUND. *Vice Chair, 20th & 25th and Co-Chair, 30th Reunion Campaign Steering Committee*

EDUCATION

HARVARD COLLEGE. *Graduated Magna Cum Laude in Economics. AB 1994* Cambridge, MA
Summa Cum Laude Honors Thesis in Economics: *An Empirical Analysis of Summer Jobs for Inner City High School Students*. Awarded prize for top Economics thesis in 1994. Worked term time in the Development and Admissions Office. GPA: 3.7 overall

LEADERLINK / ROBIN HOOD FOUNDATION. *Member of 2017 Cohort* New York, NY
Selected for leadership program that facilitates transition from corporate to nonprofit sector. Coursework in nonprofit finance and accounting. Exposure to nonprofit sector leadership



BUSINESS OWNER & ENTREPRENEUR

Owner & President of Lighthouse Insurance Agency, LLC. 39+ years in the Insurance industry. Dedicated insurance specialist with extensive knowledge in insurance products, sales and service of personal and commercial insurance. 10+ years as Owner & President of Lighthouse Insurance Agency, LLC.

Owner & President of Longtin Properties, LLC. 13+ years in the Commercial Real Estate industry.

Reputation for being passionate, kind and customer orientated. Highly respected professional within the Insurance industry and among the community, clients and fellow business owners.

AREAS OF EXPERTISE

- Business Management & Development
- Communication and Negotiation
- Accounting & Financial Management
- Strategic, Tactical & Competitive Business Planning
- Team Building & Leadership
- Delegation & Time Management
- P & L Management
- Marketing, Sales & Customer Service
- Personnel Recruiting & Training
- Networking & Consulting
- Problem Solving
- Business Risk Management

KEY ACCOMPLISHMENTS

<p><u>Lighthouse Insurance Agency, LLC</u></p> <p>Built independent insurance agency from scratch in 2002. First agency in the Northeast and first female owned agency to win Erie Insurance Group's Quality Agent Award-2009. Created a top producing multi-million dollar agency.</p>	<p><u>Burnt Hills Ballston Lake Board of Education</u></p> <p>Currently serving my sixth year on the Board. Served as Board President 2017-2018 and Vice-President 2016-2017. Instrumental in updating Board policies as well as creating the BH-BL relationship with NYSSBA.</p>	<p><u>MetLife Auto & Home</u></p> <p>Nationally recognized as #1 agent in the country for Auto, Homeowners and Life Insurance sales. Winner of the prestigious Chairman's Council Award from Metlife-2001.</p>
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PROFESSIONAL EXPERTISE

Lighthouse Insurance Agency, LLC (2002 - Present)

Owner & President

Independent Insurance Broker (Personal, Commercial & Life Insurance)

- Built independent insurance agency from scratch into a top producing, award winning agency
- Created multi-million-dollar agency
- Responsible for profit and loss management
- Responsible for interviewing prospects and training new agents as well as staff management
- Responsible for accounting and financial management
- Responsible for production levels exceeding expectations
- Responsible for expansion into new markets which resulted in increased revenue
- Oversee daily operations including marketing, sales and customer service
- Developed measurable marketing strategies
- Developed referral programs to increase sales-our agency currently gets most of its business from referrals
- Developed measurable sales and retention goals
- Developed action plans for branding, sales and retention
- Developed policies and procedures to ensure accuracy and efficiency
- Developed procedures to nurture relationships with clients
- Developed procedure to boost existing revenue stream by cross-selling to existing clients
- Created a diversified and loyal client book of business
- Designed customizable insurance plans for clients
- Designed reports and proposals to illustrate and communicate better with clients and prospects
- Provide consulting to clients on risk management and assist them in developing ways to minimize risks

Honors and Awards

Founders Auto & Property Casualty Award
Eric Insurance Group's Quality Agency Award
Centennial Award

Triple Crown Award
#1 Auto & Property/Casualty Agent Award
District Auto Award

NY Blue Diamond Award
Marketing Leader Award

District Property Award
ABM District Award

Longtin Properties, LLC (2009-Present)

Owner & President

- Own, manage and develop current and future business strategies
- Responsible for properties, creating and executing leasing agreements
- Responsible for receiving rent monies, maintenance and repairs
- Responsible for accounting and financial management
- Responsible for profit and loss management

Metropolitan Property & Casualty Insurance Co (1995 - 2002)

Insurance Agent

- Top producing, nationally recognized insurance agent
- #1 agent in the country for Auto, Home & Life Insurance sales
- Winner of the prestigious Chairman's Council Award from Metlife
- Pinnacle & top producer awards from Metlife Auto & Home

Burnt Hills-Ballston Lake Board of Education (2013 - Present)

Board Member

- Board President 2017-2018 & 2023-2024
- Board Vice-President 2016-2017 & 2022-2023
- Instrumental in creating the relationship between BH-BL and NYSSBA
- Created the process and procedure to get our Board policies in compliance and up to date
- Created the platform where the Board receives updates to Board policies
- Created the platform of which the Board will prioritize and review Board policies
- Instrumental in bringing the awareness of risk management and assisted to develop ways to minimize risk
- Member of various committees

JENNIFER J. LONGTIN

<u>Education</u>	<u>Professional Memberships</u>
Siena College- Bachelor of Business Administration (B.B.A.) Accounting and Business Management-1994 Insurance Broker & Agent Licenses- Property & Casualty Accident, Life & Health/Consulting-1994 to Present	PIA- Professional Insurance Agents IIABA- Insurance Agents & Brokers of America BH-BL Business & Professional Association The Savvy Professional Women Network



Retirement Board

David P. Keefe <i>President, Hempstead</i>	L. Oliver Robinson <i>Vice President, Clifton Park</i>
Juliet C. Benaquisto <i>Schenectady</i>	Jennifer J. Longtin <i>Ballston Lake</i>
Paul J. Farfaglia <i>North Syracuse</i>	Donald A. Little III <i>Syracuse</i>
Phyllis S. Harrington <i>Oceanside</i>	Ruth Mahoney <i>Albany</i>
Eric J. Iberger <i>Bayport-Blue Point</i>	Nicholas Smirensky <i>Delmar</i>

March 5, 2025

The Honorable Betty A. Rosa
Commissioner of Education and
President of the University of the State of New York
New York State Education Department
89 Washington Avenue
Albany, New York 12234

Dear Commissioner Rosa:

The term of Retirement Board member Ruth H. Mahoney is due to expire on May 1, 2025. I recommend and strongly endorse Ms. Mahoney's re-appointment for an additional three-year term to the Retirement Board of the New York State Teachers' Retirement System.

The provision in the Education Law that relates to Ms. Mahoney's appointment is found in Section 504(2)(a), which reads as follows:

"One member who is not an employee of the State, who shall be or shall have been an executive officer of a bank authorized to do business in this State, elected by the board of regents of The University of the State of New York to serve for a term of three years."

Ms. Mahoney currently serves on our Compensation Committee, Disability Review Committee, Investment Committee, and Risk Committee. Ms. Mahoney is an accomplished banker and a leader in our community. A copy of Ms. Mahoney's resume is enclosed for your information.

Thank you for your consideration. Please do not hesitate to contact me if you have any questions regarding any of the foregoing recommendation.

Sincerely yours,

Thomas K. Lee
Executive Director and Chief Investment Officer

cc: Mr. David Keefe, NYSTRS' Board President
Ms. Ruth Mahoney

Encs.

Ruth H. Mahoney

Executive Vice President and President of Wealth Management responsible for leading NBT's Wealth Management Business. A dynamic, independently motivated professional who provides genuine, unwavering leadership and an entrepreneurial spirit to lead teams to the highest level of performance with optimum profit and corporate growth. Outstanding public speaking and presentation skills, serving as the internal and external spokesperson. Proven track record in strategic planning, attracting and recruiting top talent, assembling high performing teams and generating strong business results. Skilled leader in bank acquisition, integration, relationship / client management and culture development.

CAREER HIGHLIGHTS

NBT, EVP and President of Wealth

August 2021 – Present

Member Executive Management team responsible for leading Company's strategic direction. Leading a \$10B ALIA Wealth Business with 75 employees scattered across the company's footprint. Primary responsibilities include Strategic / growth planning, execution, budgeting, data analysis, vendor relationship management, organizational design, marketing, PR. Work closely with bank regulators to ensure operational and compliance excellence and oversight.

KeyBank, Capital Region Market President

March 2015- August 2021

- Successfully led the integration of First Niagara Bank in the Capital Region. Combined the branches, teams and portfolios of Clients (Retail, Commercial Banking, Business Banking etc.) for the two largest banks in the Capital Region. Successfully maintained market share and with minimal loss of talent and clients.
- Market President responsible for leading the 3rd largest retail business & teams across KeyBank including community relations, philanthropy, sponsorships.
- Lead all partnership and collaboration efforts to deliver the full depth and breadth of Key to our clients.
- Internal and external senior representative and senior leader & spokesperson for Key in market

KeyBank, Capital Region, Regional Retail Executive

October 2017-Present

- Senior Leader for Retail business encompassing \$5.5B in assets, 50 retail locations, approx. 400 employees across an eight - county region. Responsible for P & L, (\$140MM PPNR annually) sales performance, client experience, strategic planning and execution, marketing, talent management, sales & sales practices, mortgage, investments, small business, real estate etc. Consistent top performing region across Key.

Key Private Bank Regional Executive (Capital Region & Hudson Valley / Metro NY) March 2015-October 2017

KeyBank, Hudson Valley/ Metro NY Market President

July 2013-March 2017

Key Private Bank Regional Executive

- Led Key Private Bank team through significant growth and turnaround of business results to Key's top performing team through 2014 and 2015. Received annual Chairman's Award in both years demonstrating the team's ability to grow the business aggressively and outperform other teams at Key.
- Significantly exceeded financial results in HV / Metro NY market with year over year revenue growth of 44%, PPNR 99.5% and investment management and trust sales 71% in 2014.
- Excellent partnerships and ability to influence partners in retail, business banking, middle market and corporate bank partners to refer clients to Key Private Bank.
- Participated in senior level segment strategy team to develop plan for future of the Private Bank business model.
- Internal and external senior representative and senior spokesperson for Key in market.

KeyBank, Hudson Valley/ Metro NY District President**Sept 2010-July 2013**

- Senior leader in the market responsible for all KeyBank business in the region including leading retail, business banking, commercial banking and private banking businesses.
- Internal and external senior representative and senior spokesperson for Key in market.
- Led all strategic business development efforts, execution of strategies and tactics to ensure key's growth and success in region.
- Significantly increased employee engagement in the region from 53% to 67% during tenure.
- Business banking and Commercial banking teams were consistently ranked amongst top teams at Key.
- Significant improvement in brand recognition, community visibility and reputation with business and community leaders over the 3-year period in role.

Key Private Bank Market Manager, Albany, N.Y.**May 2006- Sept 2010****Senior Vice President, Multi Market Manager**

Led Private Bank business for Albany and HV / Metro markets for Key Private Bank. Recruited top talent developed and redesigned team and business model extensively. Recognized as a strong leader, partner and collaborator to drive results across both districts for Key. Member of Private Bank Field Advisory team responsible for selling strategy across Private Bank and execution of all sales processes, strategies etc. Rainmaker for Private Bank. Leader of Key4Women program across both markets.

- Leader of Regional Private Banking Offices with \$525MM AUM, \$220MM in deposits, \$165MM loans.
- Manage all aspects of delivery of complex product set to several thousand clients including Banking, Credit, Investment Management, Trust and Estate Planning and Wealth Strategies.
- Rainmaker who consistently sources new business opportunities for team. Acts as Senior Relationship Manager for larger, high profile clients.
- Implemented and transitioned to new Private Bank Business Model, requiring the hiring of top talent in the marketplace.
- Prominent ambassador in community providing powerful visibility in Private Banking Sector.
- Collaborator, pioneered partnerships with Middle Market and KIS teams to generate tremendous results.
- Client Service standards consistently high, amongst top in the line of business and run-off consistently remains well below industry standards.

Bank of America, Albany, N.Y.**2001 – 2006***Fleet Bank was acquired by Bank America***Senior Vice President, City Executive,
Global Wealth Management Executive**

Responsible for team oversight of High Net Worth Client Advisors / Managers, Trust Officers, Sales/Service Associates and Administrative Staff encompassing Albany/Hudson Valley market. Assumes P & L responsibility for entire market.

- Led Private Banking Office with \$840MM assets under management, representing over \$3MM in revenue, \$35MM in deposits
- Managed all aspects of delivery of complex product set to over fifteen hundred clients including Banking, Credit, Investment Management, Trust and Estate Planning and Wealth Strategies. Portfolios carry \$245MM in outstanding credit balances.
- Individual producer and team leader consistently achieved or exceeded goals, delivered results, drove client satisfaction while ensuring employee motivation and personal success.
- Implemented new Client Contact Standards Program designed to drive client retention and customer satisfaction resulting in excess of 40% revenue growth during 2002 – 2003. Upstate NY had the highest client satisfaction scores in the Northeast.
- Leading revenue producer/ top performer Private Bank Upstate New York – 2003

Vice President, Senior Relationship Manager**1999 - 2001**

- Responsible for financial management of High Net Worth Clients; delivered a variety of complex financial services based upon individual needs. Managed portfolio of 170 Clients Relationships with \$116MM Assets Under Management. Consistently high revenue producer

Vice President and Team Leader, Cash Management 1997 – 1999
 Managed team of Cash Management Sales Specialists and Analysts encompassing Upstate New York and Connecticut Small Business Cash Management markets.

- Singularly managed portfolio of client relationships solicited opportunities for developing Cash Management relationships with companies in Capital District and Hudson Valley markets.
- Successfully developed product suite for market capitalization; hired, trained, mentored sales team. Initiative
- represented significant increase in revenue stream.

Vice President, Corporate Cash Management 1996 – 1997
 Responsible for Cash Management in Upstate New York marketplace. Middle Market companies to \$250MM in annual sales revenues. Worked closely with C & I Relationship Managers to develop proposals and marketing materials for client/prospect presentations. Consistently ranked one of the Top Producers of Cash Management Sales.

Key Bank of New York, Albany, N.Y. 1993 – 1996
Assistant Vice President, Large Corporate Cash Management Sales
 Managed, maintained portfolio of large corporate relationships valued at \$2.4MM in annual revenue. Territory encompassed 7 Eastern and many Midwest States.

- Developed in excess of \$890K in new corporate revenue stream during 2 years. Consistently led sales effort exceeding goals each year.
- Responded to proposals, consulted with existing clients on Cash Management products and services. Average sales \$100K per account, relationship responsibilities representing 50 national corporate accounts.
- Planned, organized, coordinated Cash Management Northeast Regional Sales Meeting 1995/1996.

Other related positions Key Bank:

Banking Officer, Commercial Support Services 1992-1993
 KeyCorp Management Associate Program 1991-1992

Bank of Ireland, Dublin, Ireland 1985-1987
 Branch Officer, Retail Banking

EDUCATION / PROFESSIONAL DEVELOPMENT

Marist College, Poughkeepsie, N.Y.
 BS Major: Business Administration/Marketing – Minor:
 Communications Dean's List

National Association of Securities Dealers (NASD)

Series 7 & 63 securities licenses (Voluntarily Lapsed)

Certified Trust & Financial Advisor (Voluntarily lapsed Dec 2009)

The Institute of Certified Bankers, Washington, D.C.

HONORS AND AWARDS

Named Capital Region **Power 50**, Albany Business Review, May 2021

"Women who mean business" Award, Albany Business Review 2020

Best Places to Work, Capital Region Business Review, 2018, 2019, 2020

United Way of Westchester & Putnam, Woman of Distinction Award 2018

Executive of the Year, Capital Region Business Review, 2017

American Red Cross, Corporate Champion 2017

Dutchess County Chamber of Commerce, Athena award, 2016

American Bankers Most Powerful Women in Banking Team Award member 2016

914 INC, Women who mean business, Westchester NY, 2015

YWCA of White Plains, Corporate Champion Award, 2014

Westchester Business Council, Corporate Partner Award, 2013

Women's Enterprise Development Corp, 2013

Girl's Inc. Personality Award, 2012

Women's Fund of the Capital Region, Trailblazer Award 2011

YWCA Woman of Achievement Award 2009

Chamber of Commerce and Women's Business Council – Woman of Excellence 2004

Chamber of Commerce Leadership Program Alum, Co-Chair 2004 – 2006

Hope House Funding Corporation – Circle of Hope Award 2003

Capital District Business Review – 40 under 40 Award 2003

Chamber of Commerce Capital Leadership Class 2002

Fleet's Women's Interest Group – President & Founding Member Fleet Diversity

Treasury Management Association Upstate New York Chapter – President 1998 –1999

Fleet Financial Group – Top Ten Salesperson, Cash Management 1997

Marist College – Vice President International Students Union 1989 –1991

Women's Division I Basketball - Captain & Scholarship Athlete

Irish National Basketball Team – European Championship 1987

COMMUNITY ACTIVITIES

Albany Medical Center – Board of Trustees (Hospital Affairs, Investments, Executive Compensation committees)

Regional Economic Development Council Co-Chair, 2017-Present

Capital Region Chamber of Commerce, Vice Chair 2019-Present (& Chair Elect)

New York State Teachers Retirement System, Director, May 2021 - Present

Center for Economic Growth (CEG), Board Member 2019-present

Key Women's Network Co-Chair 2014-2020

KeyCorp Diversity & Inclusion Council Member 2016-2020

KeyCorp Corporate Responsibility Council Member 2016- 2020

New York State Bankers Association – Former Board member - Retail and small business committee – Women in banking conference committee. 2010-2018

YWCA – Leadership advisory board

Westchester Medical Center – Foundation Board -2012-2015

United Way of NY State – Former Chair of grants and strategic initiatives committee

United Way of Westchester and Putnam – board member- finance and Women's leadership Committees

United Way of Greater Capital region – Vice Chair, Board

Women's Fund of the Capital Region, Founding member

St Pius X School Board, Finance committee member

Albany Institute of History & Art, Former Board Member

Girls Inc. of Greater Capital Region – Former Board member, Vice Chair of Foundation

Community Foundation of Capital District – Former Professional Advisory Committee

Chamber of Commerce Capital Leadership Program – Former Volunteer, Co-Chair

United Way Pacesetters Campaign KBNY – Chairperson & Co-Chair 1993 – 1995

United Way of Northeastern New York – Volunteer, Allocation Committee 1993 – 1996

Marist College – Alumni Representative, Standing Committee on Athletics