

## 2024 MASSACHUSETTS INVESTOR CONFERENCE SPEAKER BIOGRAPHIES

### Welcome

#### **Sue Perez**

*Deputy Treasurer | Office of the State Treasurer*

Sue Perez is a Deputy Treasurer for Debt Management in the Massachusetts State Treasurer's Office. Sue is responsible for all of the Commonwealth's short-term and long-term borrowing needs and for its \$28 billion debt portfolio consisting of issues within the General Obligation credit as well as various Special Obligation credits. Sue also serves as Executive Director of the Massachusetts Clean Water Trust ("MCWT"), a position she has held since 2012. Since that time, she has guided the MCWT through multiple new money and refunding issues, through a structural change in the way its bonds are issued, and through multiple successful issuances of MCWT Green Bonds. Sue has over 35 years of experience in accounting, audit and financial management. Sue was an auditor at PricewaterhouseCoopers, during which time she received her CPA. She is a graduate of the Boston University School of Management, with a B.S. in Business Administration. She resides in Foxborough, Massachusetts and serves as a Board Commissioner for the Foxborough Housing Authority.

#### **Jim MacDonald**

*First Deputy Treasurer | Office of the State Treasurer*

Jim MacDonald is a forty-five-year career employee in the Office of the State Treasurer. In January 2015, Treasurer Deborah Goldberg appointed Jim to the statutory position of First Deputy Treasurer. Jim also serves as Chief Executive Officer at the Massachusetts School Building Authority. As First Deputy Treasurer, Jim works closely with other state agencies on matters of policy and operations. On top of his duties as First Deputy, Jim is responsible for overseeing the daily clearing of the Commonwealth's bank accounts, short-term investing in Massachusetts Municipal Depository Trust, Small Business Banking Partnership, reconciliation of bank accounts and fund activity. Additional responsibilities include supervising the daily, monthly and quarterly cash flow, replacement of rejected electronic payments, certificate of deposits and investment accounts for various programs and banking relationships. Jim also works closely with the Deputy Treasurer for Debt Management, the Executive Director of the Massachusetts Clean Water Trust, Assistant Treasurer for the Unclaimed Property Department and other agencies and departments that fall under the umbrella of the State Treasurer. Jim is the designee of the State Treasurer on the Board of Bank Incorporation, Clean Water Trust and the MMDT Advisory Board. He also represents the Treasurer at the Massachusetts Collectors and Treasurers Association and is a member of the National Association of State Treasurers. Jim, who lives in Dedham, Massachusetts, attended Boston State College and is married to Paula, a registered nurse at Stewards St. Elizabeth's Hospital in Brighton. They have two sons, James and Stephen. He is active in St. Susanna Church in Dedham. Jim is also involved in many athletic programs for children and young adults with special needs. Jim is in his ninth term as a member of the Dedham Board of Selectmen.

### **An Update from the Massachusetts Bay Transportation Authority (MBTA)**

#### **Lynsey Heffernan**

*Chief of Policy and Strategic Planning | MBTA*

Lynsey Heffernan is a seasoned professional in public policy and strategic planning who has served her entire career in state government. Currently she is serving as the Chief of Policy & Strategic Planning at the MBTA where she is responsible for all rider-focused policies and also the mid- and long-range planning for the agency including the development of the MBTA's Capital Investment Plan. Previous roles include Assistant General Manager of Policy & Transit Planning and Deputy Director of Policy and Strategic Planning at the same organization. Lynsey also has experience in the Department of Youth Services as the Juvenile Detention Alternative Initiative State Coordinator and Detention Reform Specialist. Earlier in the career, Lynsey worked as a Staff Attorney at the Committee for Public Counsel Services. Lynsey has a Master of Public Administration with a focus on Leadership and Management from the Harvard Kennedy School, as well as a law degree from Brooklyn Law School. As the proud mom of three children in our public schools, she is also passionate about local government; Lynsey is in her sixth-year serving on the Shrewsbury School Committee.

#### **Secretary Matthew Gorzkowicz**

*Executive Office for Administration and Finance*

Matthew Gorzkowicz is the Secretary of the Executive Office for Administration and Finance. He has more than 25 years' experience in state finance and budgeting in the Commonwealth. He has served as the Associate Vice President for Administration and Finance at the University of Massachusetts President's Office for more than a decade, where he has had a direct role in setting the University's long-range administrative and financial goals and managed the development of an annual operating budget of \$3.8 billion. Prior to UMass, Secretary Gorzkowicz worked in the Massachusetts Senate, the Department of Mental Health, the School Building Authority, and the Executive Office for Administration and Finance under Governor Deval Patrick, where he served as Assistant Secretary for Budget and then Undersecretary. He is a graduate of Northeastern University and lives in Winthrop, MA with his wife and two children.

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### [An Update from the Massachusetts Bay Transportation Authority \(MBTA\)](#)

#### **Karen Antion**

*South Coast Rail Program Executive | MBTA*

Karen Antion is the Program Executive for the MBTA's South Coast Rail Program. The South Coast Rail Program will offer a reliable transit connection between southeastern Massachusetts and Boston. Riders will be able to take a one-seat ride—no transfers needed—for the first time since the late 1950s. The \$1 Billion investment in South Coast Rail includes planning, design, and construction of 37 miles of new tracks and signal systems, 6 new stations, 2 layover facilities as well as the procurement of locomotives and coaches to provide service. Ms. Antion is a transportation industry executive with decades of experience delivering large scale transportation Programs. During her tenure at the MBTA Ms. Antion has also delivered the \$1 Billion Commuter Rail Safety & Resiliency (CRSR) Program which was created to manage three major interrelated modernization and reliability projects: Positive Train Control Project (PTC), North Side Commuter Rail Automatic Train Control (ATC) Project, and the Commuter Rail Fiber Optic Resiliency (FOR) Project. The purpose of the overall Program is to meet all the requirements of the Federal Railroad Administration (FRA) for implementation of a vital safety system and to improve resiliency and increase reliability of the Commuter Rail signal system.

#### **Christina Marin**

*Director of Investor Relations and Debt Management | Office of the State Treasurer*

Christina Marin works with the Debt Management team to structure bond deals for the Commonwealth. She oversees banking and investor relationships; monitors market trends and opportunities; and looks for innovative ways to strategically optimize the Commonwealth's debt portfolio. Ms. Marin has over a decade of experience in the municipal bond space, working first as an Associate Analyst for S&P Global in its State and Local Government Ratings Group and then transitioning to serve as Director of Treasury Services and P3 Finance for Massachusetts Bay Transportation Authority (MBTA). She began her career as a local journalist covering Massachusetts cities and towns and the executive director of a small nonprofit in Central America focusing on health and education. She is a graduate of Colorado College and the Harvard Kennedy School.

### [An Update from the Massachusetts Housing Secretary](#)

#### **Secretary Edward Augustus**

*Executive Office of Housing and Livable Communities*

Edward Augustus is the Secretary of Housing and Livable Communities. Augustus served as City Manager of Worcester, functioning as the Chief Administrative and Executive Officer of the Gateway City of more than 200,000 people, from 2014-2022. During his tenure, he oversaw the commitment or distribution of \$25.3 million in Community Development Block Group, HOME Investment Partnerships Program, and Worcester Lead Abatement and Healthy Homes Program funds to develop or preserve more than 2,000 affordable housing units throughout the City. Augustus also dedicated \$30 million of the ARPA funds coming into the city to housing, including \$15 million for the Affordable Housing Trust Fund. As City Manager, Augustus managed a \$750 million budget, as well as the \$90 million, 20-year Urban Revitalization Plan. Notably, he spearheaded the \$240 million landmark redevelopment of Worcester's Canal District. Prior to joining the City of Worcester, Augustus served as Director of Government & Community Relations for the College of Holy Cross, State Senator for the 2nd Worcester District, Chief of Staff for Congressman Jim McGovern, and Chief of Staff to the Assistant Secretary for Intergovernmental and Interagency Affairs at the U.S. Department of Education under President Clinton's Administration. He most recently served as Chancellor of Dean College.

### [Economic Development in the Commonwealth](#)

#### **Secretary Yvonne Hao**

*Executive Office of Economic Development*

Yvonne Hao is the Secretary of the Executive Office of Economic Development. She has had more than 25 years of executive business experience as a senior executive, including as Co-founder, Advisor, and Managing Director at investment firm Cove Hill Partners and as an Operating Partner at Pillar Ventures. Previously, she was the Chief Operating Officer and Chief Financial Officer of PillPack, an online pharmacy that was acquired by Amazon in 2018. She is also a former Operating Partner at Bain Capital. In addition, Hao has been a Board Director of companies such as CarGurus, Flywire, Gentherm, ZipRecruiter, and Bose. She also has been involved in the community, is the Vice Chair of the Board of Trustees of Beth Israel Lahey Health, and a Trustee Emeriti of her alma mater, Williams College. She lives in Williamstown and Cambridge, and is a graduate of Williams College and the University of Cambridge.

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### *Economic Development in the Commonwealth (continued)*

#### **Patrick Larkin**

*Program Executive and Deputy Director, Director | Mass Technology Collaborative, Innovation Institute*

In his role at MassTech, Pat Larkin works closely with the Executive Office of Economic Development (EOED) to identify and support high-impact innovation-based economic development opportunities focused on growing the technology and innovation economy across the Commonwealth. Operating as an agent of the state, the Innovation Institute at MassTech provides policymakers independent and objective analysis on opportunities that offer meaningful economic growth for the state, provides professional project support for priority economic development initiatives across the ecosystem, and currently manages four public purpose investment funds supporting activities over a dozen clusters, enabling industry, academic and nonprofit entities to work on projects that improve the conditions for business and employment growth in the state's technology and innovation economy.

#### **Emily Reichert**

*CEO | Massachusetts Clean Energy Center*

As Chief Executive Officer of the Massachusetts Clean Energy Center, Dr. Emily Reichert leads MassCEC's efforts to build a robust, internationally competitive clean energy and climatetech economy in Massachusetts. Before joining MassCEC in 2023, Emily served as CEO of Greentown Labs, the largest climatetech startup incubator in North America, for nearly a decade. As the organization's first employee and Chief Executive Officer, Emily spearheaded the rapid growth of Greentown Labs into a global center for climate technology innovation, based in Somerville, Massachusetts. Under her leadership, the organization grew from a grassroots group of startups sharing space in a warehouse in South Boston to a nationally and internationally recognized organization with operations in Massachusetts and Texas. Over her tenure, Greentown incubated hundreds of cutting edge climatetech startups who have raised more than \$2 billion and created thousands of jobs in Massachusetts. Greentown Labs has evolved into a replicable model for governments around the world seeking to develop similar climatetech innovation ecosystems in their cities and countries over the past decade. Emily started her career at Arthur D. Little as a Ph.D. scientist and progressed into R&D, business development and general management roles. Prior to Greentown Labs, she was the Director of Business Operations at the Warner Babcock Institute for Green Chemistry where she helped grow the angel-funded startup into a sustainable contract R&D business with a mission to minimize environmental impact of chemical products. Emily has been appointed to the Massachusetts Governor's Economic Development Planning Council, the Massachusetts Advanced Manufacturing Collaborative, the U.S. Secretary of Commerce's National Advisory Council on Innovation and Entrepreneurship and the World Economic Forum's Global Future Council on Advanced Energy Technologies. She currently serves as an Ambassador for the U.S. Department of Energy's Clean Energy Education and Empowerment (C3E) Initiative focused on promoting women leaders in the clean energy field. Emily was appointed by Governor Healey to the STEM Advisory Council in June 2024. She holds a Ph.D. in Physical Chemistry from the University of Wisconsin-Madison and earned her MBA from MIT Sloan School of Management.

#### **Undersecretary Ashley Stolba**

*Executive Office of Economic Development*

Ashley Stolba, who has served as EOED Undersecretary of Community Development since 2021, will stay on in the office as Undersecretary of Economic Foundations. She will expand her portfolio to foster foundational economic opportunities for residents, communities, and businesses across Massachusetts. Stolba will continue to lead the community development team by managing the Community One Stop for Growth, serving as vice-chair of the Seaport Economic Council, overseeing work to close the digital divide, and maintaining the state's military installations. In addition to these duties, Stolba will now oversee other key foundational areas such as regional businesses assisted by the Massachusetts Office of Business Development; small, micro, and immigrant-led businesses; and the new Director of Rural Affairs. She will also now serve as the secretariat's climate officer focused on climate infrastructure needs. Stolba will work closely with others across the Healey-Driscoll Administration on these areas of focus, as well as with quasi-government agencies such as MassDevelopment and the Massachusetts Growth Capital Corporation. Prior to joining EOED, Stolba was Chief of Staff at the Harvard Allston Land Company and held roles as Deputy Chief of Staff and Legal Counsel at the Massachusetts Port Authority, Associate Counsel at the Massachusetts Association of Realtors, and Policy Analyst in the Massachusetts House of Representatives. A native of Mashpee, she received her bachelor's degree in business administration from the University of Miami and her juris doctor from Suffolk University Law School.

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### Treasurer's Address

#### State Treasurer Deborah B. Goldberg

*Commonwealth of Massachusetts*

Deborah B. Goldberg is the Massachusetts State Treasurer and Receiver General. In that role she is responsible for the state's cash and debt management, unclaimed property, and chairs state boards and commissions, including the Massachusetts School Building Authority, the Pension Reserves Investment Management Board, the State Board of Retirement, Massachusetts State Lottery Commission, and the Massachusetts Clean Water Trust. In 2015, she established the new Office of Economic Empowerment, the first of its kind in the country, and chairs its Economic Empowerment Trust Fund. Treasurer Goldberg also was elected to serve as President of the National Association of State Treasurers. As a former businesswoman and local elected leader, Treasurer Goldberg brings innovative leadership, disciplined fiscal management and an unwavering commitment to uphold economic stability and create opportunity for every Massachusetts resident. Treasurer Goldberg served for six years on the Brookline Board of Selectmen, including two as its Chair. Prior to her career in public service, she worked in retail operations, buying, and consumer affairs at The Stop & Shop Companies, Inc. Treasurer Goldberg is the President Emeritus of Adoptions with Love and serves on the Advisory Board of the Greater Boston Food Bank. She was one of the founders of Berkshire Hills Music Academy, a school for individuals with intellectual disabilities, is a trustee emeritus at Beth Israel Lahey Health, and a Director at Affiliated Physicians Group / Beth Israel Deaconess HealthCare. Treasurer Goldberg has been actively involved with numerous philanthropic activities, including The Grow Clinic, the 100 Club, Planned Parenthood League of Massachusetts, and the Combined Jewish Philanthropies. A graduate of Boston University, Boston College Law School and Harvard Business School, Treasurer Goldberg lives in Brookline with her husband Michael Winter and their son, Evan, and daughter, Meredith.

### Governor's Address

#### Governor Maura Healey

*Commonwealth of Massachusetts*

Maura Healey is the 73rd Governor of Massachusetts. In 2022, she became the state's first woman and first openly LGBTQ person elected to the position. In her first year as Governor, Healey has already delivered on key promises to help Massachusetts become a leader in clean energy, a more affordable and equitable place to live, and a great place for businesses to operate. On her first day in office, Governor Healey appointed the nation's first cabinet-level Climate Chief and created the Office of Climate Innovation & Resilience to coordinate policies across all of state government to address the climate crisis. Governor Healey has also prioritized education and workforce development by making free school meals for K-12 students permanent and creating a free community college program for residents ages 25 and older. She has made historic investments in apprenticeships and other career pathways. Governor Healey also delivered on her promise to make Massachusetts more affordable by cutting taxes for the first time in 20 years, including creating the most generous Child and Family Tax Credit in the county. Her tax cuts package puts money back into the pockets of families, renters, seniors and others who are struggling to keep up with the rising cost of living. She also recently introduced the \$4 billion Affordable Homes Act, which would be the state's largest housing investment in history, to create tens of thousands of homes and lower costs. Healey previously served two terms as Massachusetts Attorney General, first elected in 2014 and re-elected in 2018. In her role as the People's Lawyer, she took on difficult issues impacting Massachusetts residents, including the opioid epidemic, the climate crisis, escalating health care costs, and student loan debt. Earlier in her career, Healey was a litigation partner at an international law firm. Healey grew up the oldest of five siblings in an old New England farmhouse. She and her siblings were raised by their mother, Tracy, who worked as a nurse at the local elementary school. Her stepfather, Edward, who later joined the family, was a teacher and local union president. He coached her high school basketball team and instilled a lifelong love of the sport. Healey attended Harvard College, where she captained the basketball team, and then spent two years as a 5'4" starting point guard on a professional basketball team in Austria. For much of her career, she's been the only woman in the room and has taken every opportunity to elevate other women. She is a passionate advocate for LGBTQ rights, women's health, and women's equality in general, especially in sports. Governor Healey lives in Arlington, Massachusetts with her partner, Joanna Lydgate.

### The Massachusetts Economy

#### Dr. Michael Goodman

*Executive Director of Economic Development and Community Partnerships, Professor of Public Policy | UMass Dartmouth*

Dr. Michael Goodman is Executive Director of Economic Development & Community Partnerships and Professor of Public Policy at the University of Massachusetts Dartmouth. Prior to assuming this role he served as Senior Advisor to the Chancellor following 18 months of service as Acting Provost and Vice Chancellor for Academic Affairs. This followed six years of service as Executive Director of the Public Policy Center, two terms as Faculty Senate President, and six years as Chair of the Department of Public Policy. A leading analyst of the Massachusetts economy, he has authored or co-authored over fifty professional publications on a wide range of public policy issues including regional economic development and housing policy as well as demographic and other applied social science research topics. Throughout his career he has served as a principal investigator on over \$14 million in external grants and contracts from a diverse array of public and private sources. Professor Goodman currently serves as Co-Editor of MassBenchmarks,

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### *The Massachusetts Economy (continued)*

the journal of the Massachusetts economy published by the UMass Donahue Institute in cooperation with the Federal Reserve Bank of Boston. He is also an active and longstanding member of several boards and community-based organizations including: The Associated Industries of Massachusetts (AIM) Economic Advisory Board, The New England Public Policy Center at the Federal Reserve Bank of Boston Advisory Board, Massachusetts Economic Assistance Coordinating Council (Gubernatorial appointee), Innovation Index Advisory Committee Member (Massachusetts Technology Collaborative), One SouthCoast Chamber of Commerce Education Committee, Community Advisory Board Member (Rhode Island NPR)

### *A Discussion on Municipal Engagement with the Commonwealth*

#### **Sean Cronin**

*Senior Deputy Commissioner for Local Services | Department of Revenue*

Sean Cronin has been the Senior Deputy Commissioner for Local Services at the Department of Revenue since February, 2015. Prior to that, Sean spent 17 years working in Brookline, the last 12 as the Deputy Town Administrator. He holds a bachelor's degree in government from Wesleyan University and a master's degree in public administration from the Maxwell School at Syracuse University.

#### **Quentin Palfrey**

*Director of Federal Funds and Infrastructure | Executive Office for Administration and Finance*

Appointed by Governor Healey in March of 2023, Quentin Palfrey serves as the Governor's principal advisor on how Massachusetts can secure federal dollars through the Bipartisan Infrastructure Law, Inflation Reduction Act, CHIPS and Science Act, and other funding opportunities. Palfrey leads a whole-of-government strategy to ensure state agencies, municipalities, federal recognized tribes, and other partners can effectively leverage the historic amount of federal funding available to Massachusetts to further goals for improved infrastructure, equity, job creation, economic competitiveness, climate resiliency and decarbonization, workforce development, and more. Palfrey has previously served as a senior political appointee in the Administrations of President Obama and President Biden. Under President Obama, he was Senior Advisor for Jobs & Competitiveness in the White House Office of Science & Technology Policy, as well as Deputy General Counsel for Strategic Initiatives in the US Department of Commerce. On Day One of the Biden Administration, Palfrey served as Acting General Counsel of the U.S. Department of Commerce, managing a team of several hundred lawyers in a department with over 50,000 employees. Palfrey was also the first Chief of the Health Care Division in the Massachusetts Attorney General's office during the time when Massachusetts was implementing its landmark health reform law.

#### **Anne Gobi**

*Massachusetts Director of Rural Affairs | Executive Office of Economic Development*

Senator Anne Gobi was elected in 2014 to represent the Worcester, Hampden, Hampshire and Middlesex district. She has served as the Chair of the Joint Committee on Higher Education, Vice Chair of the Senate Committee on Redistricting, and Vice Chair of the Special Joint Committee on Redistricting. Senator Gobi has been a vocal advocate for veterans as the Chair of the Joint Committee on Veterans and Federal Affairs. Gobi's legislative priorities include promoting small businesses, combating the opioid epidemic, promoting clean and affordable energy sources, and making smart capital investments for the continued prosperity of the Commonwealth. Prior to being elected to the Senate, Gobi was a member of the Massachusetts House of Representatives for 12 years. She received her bachelor's degree from Worcester State College and her law degree from Massachusetts School of Law. Gobi resides in Spencer with her husband, Bob, and dog, Quinn.

#### **Kathy Bramlage**

*Senior Debt Analyst | Office of the State Treasurer*

Kathy Bramlage works with the Debt Management team to structure both short-term and long-term general obligation bond deals for the Commonwealth as well as certain special obligation issues. Ms. Bramlage has over 40 years of experience managing fixed income investments. She was a portfolio manager for municipal mutual funds, taxable and tax-exempt money market funds, institutional corporate accounts, as well as fixed income portfolios for high net-worth individuals and families. In addition, she was a fixed income strategist and a municipal credit analyst, covering all investment grade sectors of the market. Prior to joining the Massachusetts State Treasurer's Office, Ms. Bramlage was a municipal portfolio manager and credit analyst at an asset management firm in New York City. She received her Bachelor of Science in Accounting/Finance from Oakland University in southeast Michigan. She is a member of the National Federation of Municipal Analysts, the Boston Municipal Analysts form, and Women in Public Finance.

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### *Luncheon with Dr. David Kelly*

#### **Dr. David Kelly**

*Chief Global Strategist and Head of the Global Market Insights Strategy Team | J.P. Morgan Asset Management*

Dr. David Kelly is the Chief Global Strategist at J.P. Morgan Asset Management and is also the Head of the Global Market Insights Strategy Team which produces the industry-leading "Guide to the Markets". David has over 25 years of experience at major financial firms, providing insight and perspective on investing with a particular focus on how the evolving economic landscape impacts prospective asset class returns. He has written extensively on all aspects of the U.S. economy and his proprietary economic forecasting model helps shape his views. Throughout his career, David has developed a unique ability to explain complex economic and market issues. He is a sought after keynote speaker at many national investment conferences and a frequent guest on CNBC, Bloomberg, and other financial media outlets. He is also sits on JP Morgan Fund's operating committee. In his free time, David is an active runner and is participating in his 5th straight Boston marathon this April. David is a CFA® charterholder, holds a Ph.D and M.A. in Economics from Michigan State University and a B.A. in Economics from University College Dublin in the Republic of Ireland.