



**WOMEN IN PUBLIC FINANCE**

# **WOMEN IN PUBLIC FINANCE 2025 Annual Report**

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## A MESSAGE FROM 2025 BOARD PRESIDENT KATHLEEN BOWE



As I reflect on my year serving as Board President of Women in Public Finance, I am filled with gratitude and pride for what this organization and its members continue to accomplish together. An idea that began nearly three decades ago as the vision of four extraordinary women has grown into a thriving national network united by a shared mission: to support and advance the careers of women in public finance through connection, education, and inspiration.

In 2025, Women in Public Finance continued to strengthen its impact and expand its reach. Our annual conference was, by every measure, a tremendous success. We welcomed more than 500 attendees from across the country to build meaningful connections, engage in thoughtful dialogue, and become inspired by our truly exceptional speakers. The depth of expertise, authenticity, and generosity our speakers brought to the stage reinforced the power of women sharing their stories and lifting one another up. One moment from this year's conference continues to stay with me. In her keynote remarks, Lindsay Shookus shared a story about a woman who encouraged her to chase a dream she wasn't yet sure she could claim. That woman told her "I believe you can do it", and she did. It was a powerful reminder that sometimes the most meaningful leadership doesn't come from titles or accolades but from taking a moment to tell another woman

that she belongs, that she is capable, and that her voice matters.

A central focus for WPF this year was visibility, ensuring that women in our industry are recognized for their accomplishments and potential in our field. Through the continued expansion of the WPF Speaker Bureau and our educational programming, we are creating more opportunities for women to lend their voices to industry conversations and to shape the future of public finance.

This year we invested intentionally in the future of our organization with the launch of the Emerging Leaders Council, designed to elevate high achieving early career professionals and more deeply engage the next generation of WPF leaders. The enthusiasm for this inaugural program speaks volumes about the talent within our membership and the importance of building clear leadership pathways. At the same time, our Issuer Ambassador Program and growing network of 25 chapters continued to strengthen engagement, offer mentorship, and advance the excellence of women in our field.

As we approach Women in Public Finance's 30th anniversary, we do so with momentum, purpose, and an opportunity to continue shaping a more inclusive future for our industry. While progress has been made, there is still important work ahead. I encourage each of us to be the woman who opens a door, who offers encouragement, and who tells another woman "you can do this".

Women in Public Finance has shaped my career from my time as a first-year analyst enlisted to help plan events for the Virginia chapter and feeling so intimidated by the accomplished women in my midst. I would come to see these once-intimidating women as mentors, sponsors and friends who have encouraged me to pursue dreams that once seemed far out of reach. Serving as President of Women in Public Finance is one of those dreams, and leading this organization has been one of the most meaningful experiences of my career. I am deeply grateful to our Board of Directors, chapter leaders, sponsors, and members whose dedication makes this organization thrive. Most of all, I am grateful to the women of WPF who show up for one another, year after year, and prove the lasting impact of women helping women succeed.

## WOMEN IN PUBLIC FINANCE 2025 BOARD OF DIRECTORS



**Front Row, L to R:** Bhanu Patil; Melanie Johnson; Kathleen Bowe; Jennifer Fredericks; Romy McCarthy; **Middle Row:** Sarah Sanchez; Tamika Reed; **Back Row, L to R:** Christina Long; Liberty Ziegahn; Lindsay Evans; Shawn Dralle; Laurie Scott; Anna Horevay; Abigail Urtz; Toni-Marie Kahre; Christine Reynolds; Mikki Mathews. **Not Pictured:** Amanda Lee; Martina Hinojosa; Mary Kate Rogan.

### WPF BOARD EXECUTIVE COMMITTEE

**President**  
**Kathleen Bowe**  
 Wells Fargo Bank, N.A.

**President Elect**  
**Melanie Johnson**  
 Piper Sandler & Co

**Immediate Past President**  
**Jennifer Fredericks**  
 Baker Tilly

**VP, Conference:**  
**Amanda Lee**  
 Jefferies LLC

**VP, Chapters**  
**Sarah Sanchez**  
 UMB Bank

**Secretary**  
**Anna Horevay**  
 McGuireWoods LLP

**Treasurer**  
**Toni-Marie Kahre**  
 San Diego County Water Authority

**Assistant Treasurer**  
**Laurie Scott**  
 Integrity Public Finance Consulting LLC

### BOARD MEMBERS

**Shawn Dralle**  
 Cabrera Capital Markets, LLC

**Lindsay Evans**  
 BOK Financial Securities Inc.

**Martina Hinojosa**  
 Bracewell LLP

**Christina Long**  
 Los Angeles County Metropolitan Authority

**Mikki Mathews**  
 JPMorgan Chase & Co

**Romy McCarthy**  
 D.A. Davidson & Co.

**Bhanu Patil**

**Tamika Reed**  
 Siebert Williams Shank & Co., LLC

**Christine Reynolds**  
 Orrick, Herrington & Sutcliffe LLP

**Mary Kate Rogan**  
 PNC Capital Markets LLC

**Abigail Urtz**  
 FHN Financial

**Liberty Ziegahn**  
 Oppenheimer & Co. Inc.

### COMMITTEE CHAIRS

**Chapters:** Sarah Sanchez  
**Communications:** Liberty Ziegahn  
**Conference:** Toni-Marie Kahre  
**Education:** Martina Hinojosa and Bhanu Patil  
**Issuer Ambassador:** Toni-Marie Kahre

**Membership:** Mary Kate Rogan and Laurie Scott  
**Mentorship:** Lindsay Evans and Anna Horevay  
**Nominating:** Melanie Johnson  
**Scholarship:** Romy McCarthy and Mikki Mathews  
**Speaker Bureau:** Jennifer Fredericks

## WPF CHAPTERS AND CHAPTER PRESIDENTS

### ALABAMA

**Marcie Lewis**

PFM Financial Advisors LLC

### BOSTON

**Rebecca Sullivan**

Massachusetts Development Finance Agency

### CHICAGO

**Katherine Gale**

Chapman and Cutler LLP

### FLORIDA

**Rene´ O´Day**

Deep Blue Investment Advisors

### GEORGIA

**Shaney Lokken**

Hunton Andrews Kurth LLP

### INDIANA

**Susanna Khan**

Indiana University Health

### IOWA

**Melissa Stover**

UMB

### KANSAS & MISSOURI

**Stephanie Bogue**

Gilmore bell

### LOS ANGELES

**Rachel Chang-Kwei**

Fieldman Rolapp & Associates, Inc.

**Shelby Schwabauer**

Build America Mutual

### LOUISIANA

**Tiffany S. Trosclair**

Foley & Judell, LLP

### MARYLAND

**Luisella Wilke**

Hawkins Delafield & Wood LLP

### MICHIGAN

**TeAnn Smith**

Michigan State Building Authority

### MINNESOTA

**Jessica Cameron Mitchell**

PFM Financial Advisors LLC

### MOUNTAIN REGION

**Kathleen Belden**

BMO Commercial Bank

### NORTH CAROLINA

**Kristen Kirby**

McGuireWoods LLP

### NORTHERN CALIFORNIA

**Taylor Hart**

JP Morgan

### OHIO

**Emily Cannon**

PNC Capital Markets LLC

### OKLAHOMA

**Melissa Westfall**

Hillborne and Weidman, P.C.

### PACIFIC NORTHWEST

**Christi Jacobsen**

Hillis Clark Martin & Peterson P.S.

### PENNSYLVANIA

**Morgan Haas**

Ballard Spahr LLP

### SAN DIEGO

**Mia Corral Brown**

Chandler Asset Management

### TENNESSEE

**Carol Ward**

City of Memphis, TN

### TEXAS

**Nicole K. Conley**

Siebert Williams Shank & Co., LLC

### VIRGINIA

**Misty Upson**

Virginia Department of Transportation

### WISCONSIN

**Tatiana Graver**

Wisconsin Health & Educational Facilities Authority

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## OUR STORY

Founders Courtney Shea, Sarah Eubanks, Lois Scott, and Nancy Remar had a vision in 1997 that the public finance industry needed more support for women, so they decided to launch Women in Public Finance (“WPF”). WPF began as a Chicago based organization and has grown over these decades to 25 regional chapters, ultimately drawing interest and participation from all over the United States. WPF is national membership organization with chapters, individual members, and affiliates throughout the United States. Our values are grounded in leadership development to advance women in public finance through mentoring, educational and scholarship programs and relationship building. Members in the organization represent many facets of the industry including state and local government issuers, investment bankers, commercial bankers, attorneys, financial advisors, rating agency analysts, bond insurers, and trust officers, among others.

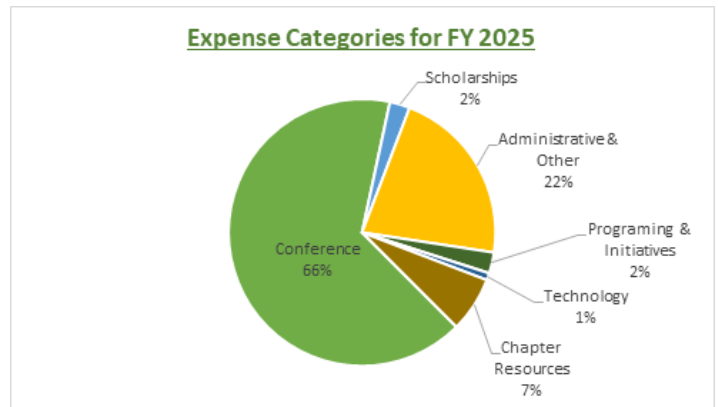
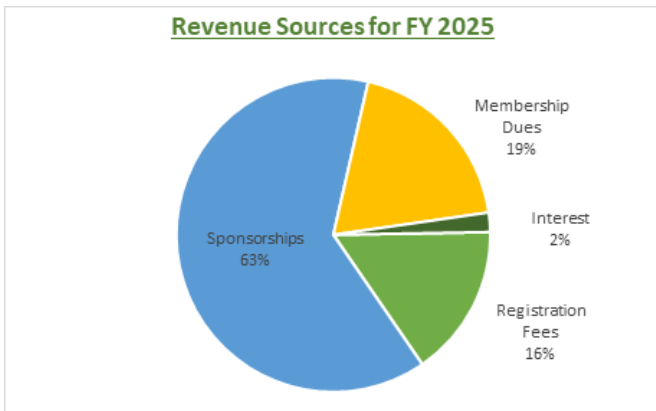
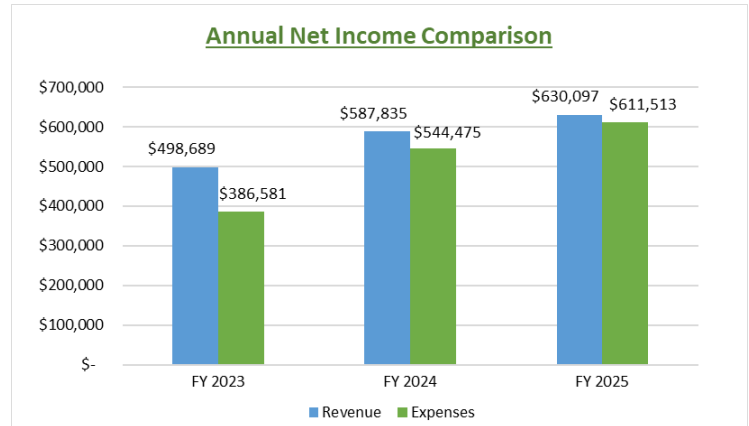


WPF Founders: Nancy Remar, Sarah Eubanks, Courtney C. Shea, and Lois Scott

## 2025 HIGHLIGHTS

### FINANCIALS

WPF derives its income from sponsorships, conference registrations and membership dues. The impact of our sponsors is incredible and is hugely important to WPF’s mission, accounting for over 63% of total income. Nearly 63% of our annual budget is spent on expenses related to our Annual Conference, which underscores the importance of the Annual Conference in furthering WPF’s mission. WPF operates on a May 31<sup>st</sup> Fiscal Year (“FY”). In FY 2025, WPF revenues increased by over \$36,000 or 6%, however increasing costs of the Annual Conference and professional fees offset this to result in net income of \$18,585. WPF continues to focus on identifying ways to increase revenues and manage expenses. Thank you to our sponsors identified herein for your continued support!



### COMMUNICATIONS

WPF’s monthly email newsletter amplifies national and chapter programming and spotlights member achievements. The newsletter also serves as a centralized place to find information on events, membership, sponsorship, job bank and much more. In 2025, WPF also grew our social media outreach adding 703 new followers on LinkedIn. We now have over 5,140 followers and garnered incredible engagement with 123,297 impressions and 3,109 reactions in 2025. We encourage you to engage with us via our website [wpfc.com](http://wpfc.com) or [LinkedIn](https://www.linkedin.com/company/women-in-public-finance) and use the hashtag [#womeninpublicfinance](https://www.linkedin.com/search/content/hashtag/womeninpublicfinance) when posting on social media platforms.





**WOMEN IN PUBLIC FINANCE**  
MONTHLY INSIGHTS

REGISTER FOR WPF 29TH ANNUAL CONFERENCE & FOUNDERS' AWARDS RECEPTION



**29th Annual Conference**  
September 17-19, 2025

at The JW Marriott Atlanta Buckhead, Atlanta, GA

**Registration** for the Women in Public Finance 29th Annual Conference at The JW Marriott Atlanta Buckhead, Atlanta GA is open! Please join us.

UPCOMING EVENTS

5/6/2025  
- Women in Public Finance - Boston Chapter - Happy Hour

5/7/2025  
- Women in Public Finance - WVPF 2025 Founders' Awards Reception

## MEMBERSHIP

Women in Public Finance has approximately 1,000 dues paying members that span the public finance industry, including professionals from state and municipal governments, non-profit organizations, investment banks, rating agencies, bond insurers and legal firms, as well as financial consultants and trust officers. We seek to grow this membership by demonstrating value through robust programming and networking opportunities, as highlighted in the graphic below.

		NATIONAL MEMBER	CHAPTER AFFILIATE
COSTS	Annual Membership	Issuers/Students/Retirees \$40 Other Professionals \$200	No annual fee; Event costs vary by chapter
	Annual Conference including Welcome and Founders' Reception	Issuers \$150 Other Professionals \$450	\$675
	Network with professional women around the country in both the public and private sector	✓	
BENEFITS	Network with professional women in your region in both the public and private sector	✓	✓
	Access online Membership Directory	✓	
	Participate as a Mentor and/or Mentee with professionals across job functions and geographies in a structured program	✓	*
	Identify new professional opportunities through WPF Job Bank	✓	*
	Expand your knowledge and grow professionally through complimentary monthly educational programming	✓	*
	Support educational scholarships for college students	✓	*
	Gain leadership skills serving on Boards and Committees	✓	✓
	Attend Annual WPF Conference	✓	✓
	Attend Member-only Annual WPF Conference Events	✓	

*The table reflects 2025 pricing*

*\* Varies by Chapter*

## SCHOLARSHIP

To encourage young women to consider careers in public finance, the Scholarship Committee recognizes college-bound high school students and both undergraduate and graduate school students who have exhibited scholastic achievement and demonstrated leadership skills by awarding scholarships. In addition to the opportunity for an award, scholarship recipients are afforded the opportunity to meet established women in the public finance industry and learn about career options. In 2025, five national scholarships – totaling \$15,000 – were granted to the aspiring public finance female professionals highlighted herein. In addition, chapters also awarded a total \$68,500 to 28 women, bringing the combined total of WPF scholarship awards to \$83,500. This year, we had one recipient that won an award from the Texas Chapter as well as National for a total scholarship of \$6,000.

**NATIONAL SCHOLARSHIP WINNER**

**Sophie Zhang**

**Columbia University**

Undergraduate Student: Economics and Mathematics  
Graduation Year: Spring 2029



**Community Service**

Girls who Code (non-profit)  
Financial Finesse Instagram account creator  
Affluensity Podcast Producer and Writer  
Tutor UPchieve

**Extracurriculars**

Team Captain for 2024 Junior Olympics and 2024 National Championship for Fencing  
Varsity Tennis Team (4 years)  
Multi-lingual (English, Spanish and Mandarin)

Sophie Zhang describes her interest in public finance focused on public impact. She shared in her essay how learning about municipal finance can be used to support hospitals, clean energy, education and other crucial services, as well as enhancing the reach of public funding to underserved communities.

*What do you hope this scholarship will help you achieve?*

**“My main goal is to actively apply my education (supported by this scholarship) to bring finance into a conversation with impact by raising capital for projects that support schools, housing, clean energy, and opportunity. Women in Public Finance is a community which proves that finance can serve the public good while opening doors for women in a male-dominated field. And just as books have been vital in expanding my knowledge and diversifying my perspective, this scholarship will be instrumental to my development into a leader who invests in relationships, communities, and progress in the financial sector and beyond.”**

**Academic Accolades**

GPA 4.00  
Salutatorian of Class (ranked 2 of 436)  
National Merit Commended Scholar  
AP Scholar with Distinction  
National Honor Society Business Honor Society  
Mu Alpha Theta Math Honor Society  
Spanish Honor Society  
Rho Kappa Social Studies Honor Society  
Rising Entrepreneurial Leaders Association  
Future Business Leaders of America

**ADDITIONAL NATIONAL SCHOLARSHIP WINNERS**

**Skylar Hunter**

**Florida State University**

Graduation Year:  
Spring 2029



**Briana Havlin**

**Southern Methodist University**

Graduation Year:  
Spring 2029



**Erica Jieun Lee**

**Minnesota State University**

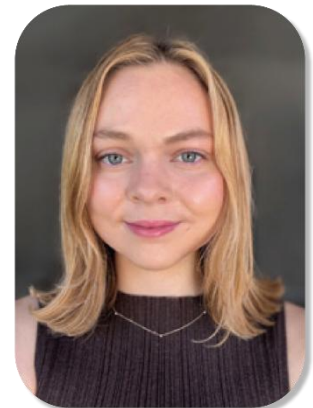
Graduation Year:  
Spring 2026



**Lela Lerner\***

**The University of Texas at Austin**

Graduation Year:  
Spring 2026



Lela Lerner\* received both a Texas Chapter Award as well as a National award for \$6,000 total.

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## **EDUCATION**

The Education Committee supports the organization's mission by providing opportunities and resources designed to advance the careers of women in the public finance industry. By developing and facilitating these initiatives, members enhance their knowledge of the industry, develop unique skillsets and hone leadership skills. In 2025, WPF hosted webinars on leadership and professional development training. Our webinars included:

- **The Silent Negotiator: Mastering Non-Verbal Communication for Everyday Success.** Tonya Reiman, Media Personality led a user-friendly overview on how to be better equipped to negotiate with confidence and finesse using the untapped power of body language.
- **High Heels and High Yields: A Female Professional's Guide to Financial Planning at All Stages of Career Development.** Romy McCarthy, Managing Director D.A. Davidson & Co. hosted our guest Brook Napiwocki, CFP NS Director, Senior Wealth Manager LIDO, who specializes in helping women achieve financial confidence and align their financial resources with their vision and values.
- **Clarity in Career Transitions: Identifying Your Core Values to Approach Career Transitions with Confidence.** Our esteemed panel of i) Martina Hinojosa, Senior Counsel, Bracewell LLP; ii) Jaimee Boyd, General Counsel, Provident Resources Group Inc.; iii) Nicole Conley, Managing Director, Siebert Williams Shank & Co., LLC.; and iv) Linda Vanderperre, Managing Director, KBRA discussed identifying your personal values and long-term goals to determine whether it is time for a change and incorporating transitions with stages of life for career growth, joy, and personal life management.
- **Executive Presence - Getting to Gravitas.** We hosted a dynamic session with Raleigh Mayer, the Gravitas Guru, who helps leaders at clients ranging from American Express to the U.S. State Department elevate their influence and impact.
- **Presence with a Purpose: Building Value, Inspiring Confidence.** Nasreen Davidson, Founder of Kaliok Consulting, shared how leaders and organizations can confidently navigate the accelerating pace of change and the evolving world of work.
- **Fireside Chat with Paulina Bren.** Paulina Bren, award-winning historian and professor, discussed her new book, *She-Wolves: The Untold History of Women on Wall Street*.
- **Gentelligence Webinar.** With five generations currently in the workplace, many leaders view this dynamic as a frustration and a challenge. In this engaging workshop with Megan W. Gerhardt, Ph.D., Professor of Management and Leadership at Miami University's Farmer School of Business, we went beyond the core concepts to activate and apply the strategies of Gentelligence to organizations' unique generational challenges.
- **All about Mentorship.** A panel of mentors and mentees discussed the benefits of mentorship and experience participation in the WPF program. Speakers included: Melanie Johnson, Managing Director, Head of Social Infrastructure, Piper Sandler; Maryam Rawesh, Compliance Examiner, D.A. Davidson; Kayla MacEwen, Managing Director, Masterson Advisors LLC; and Natalie Alviani, Vice President and Trust Officer at Zions Bank.
- **Bonds 101 - Unlocking the Basics of Public Finance.** Hosted by the Emerging Leaders Counsel, the webinar provided a breakdown of the essentials for those new to bonds or just wanting a refresher to provide knowledge and confidence to understand how bond deals work with speakers Lisa Marie Harris, Director of Finance/Treasurer (CFO) San Diego County Water Authority and Caitlyn Burchfield, Partner Butler Snow LLP.

## EMERGING LEADERS' COUNCIL

In 2025, WPF launched our Emerging Leaders Council, a program designed to elevate high-achieving early career professionals in public finance. Thirteen talented and creative women joined WPF to promote their career growth by developing leadership skills, building professional relationships and gaining industry recognition to become the next generation of women leaders. These women were selected from over 40 well-qualified applicants and bring fresh perspectives, energy, and innovation to our organization. They have begun leading key initiatives in the organization including creating a Bonds 101 Webinar Series, the first webinar of which drew an audience of over 250 attendees.

### 2025 EMERGING LEADERS' COUNCIL

**Madison Maher (Chair)**  
Oppenheimer & Co. Inc.

**Kira Antoine**  
DC Housing Finance Agency

**Morgan Corley**  
Cabrera Capital Markets, LLC

**Savannah Gilmore**  
S&P Global

**Charity Karanja**  
Butler Snow LLP

**Anthia Ma**  
Frasca & Associates, LLC

**Megan McCarthy**  
Ballard Spahr LLP

**Lindsay McVicar**  
State of Georgia

**Taylor Medlock**  
JPMorgan Chase & Co.

**Quynh-Thi Nguyen**  
Hilltop Securities Inc.

**Narineh Panosian**  
Siebert Williams Shank & Co., LLC

**Clare Riva**  
Pacifica

**Rose Anne Valera**  
US Bank N.A.

## MENTORSHIP

Mentorship, one of the most important tools for professional development, has been linked to greater productivity, career advancement, and professional satisfaction. WPF recognizes this and assists women in the industry through its Mentorship Program. Under the guidance of the Mentorship Committee, members gain access to a structured and guided mentorship program that fosters supportive professional relationships. Over the last few years, enhancements to the program have been introduced, including the roll out of a lateral match program, and providing professional personality assessments for participants. In 2025, over 75 women participated in the program, and a new mentorship meetup was introduced for program participants at the Annual Conference.



## SPEAKER BUREAU

The WPF Speaker Bureau serves a dual purpose: i) to provide a resource for event managers, conference organizers, journalists, and podcasters to find qualified female speakers, and ii) to support women looking to become more powerful speakers and panelists. The WPF Speaker Bureau can match industry leaders, subject matter experts, and inspirational keynote speakers on a variety of subjects to maximize education and engagement. For those members interested, WPF can provide tools and opportunities to hone and promote your public speaking skills for improved confidence, delivery, and visibility.

## CHAPTERS

The Chapters Committee serves as the vital bridge between the National organization and the 25 Chapters of Women in Public Finance it sponsors at state and regional levels (“WPF Chapters”). In 2025, the Chapters Committee launched a Technology Initiative to streamline National’s technology offerings to the WPF Chapters, with the new plan rolling out in January 2026. Throughout 2025, our Chapters fostered nationwide connection through diverse events spread throughout the country, including book clubs, dine-arounds, lunch-and-learns, and educational tours of municipal infrastructure. Highlights included market updates, golf clinics, and philanthropic service. Notably, Michigan became the 25th Chapter in 2025, and we look forward to welcoming a 26<sup>th</sup> Chapter in 2026!

### 25 TOTAL CHAPTERS

Alabama	Mountain Region
Boston	North Carolina
Chicago	Northern California
Florida	Ohio
Georgia	Oklahoma
Indiana	Pacific Northwest
Iowa	Pennsylvania
Kansas & Missouri	San Diego
Los Angeles	Tennessee
Louisiana	Texas
Maryland	Virginia
Michigan*	Wisconsin
Minnesota	

*\* Denotes a chapter added in 2025*

### CHAPTER SCHOLARSHIP WINNERS

#### Boston

Melody Masunda

#### Chicago

Georgia Beake Little

Kokoro Otsuki

Preethi Anbalagan

#### Florida

Jadae Joseph

Whitney Fontes

Amina Zelihic

#### Indiana

Ashley Flick

Jayla Thomas

#### Los Angeles

Leah Ho

Angela Yang

#### Minnesota

Audrey Kurek

Amrit Bhutani

Sarina Karki

#### Texas

Priscilla Rios

Vanessa Flores

Lela Lerner\*

Mahdis Hamisi

Israa Wadif

Greta Hall

Madison Osazuwa

Ruth Adane

Jubaida Iftekhar

Zylina Jonmari Sala

#### Virginia

Madeline Diluigi

Mara Ball Lidya Beniyan

Lidya Beniyan

Nana Adjoa Birago Adu-Amoah

Taylor Medlock

*\* Lela Lerner received both a Texas Chapter award as well as a National Award for \$6,000 total.*

**HIGHLIGHTS FROM CHAPTER EVENTS**

***Florida Chapter***



***Mountain Region Chapter***



***Pennsylvania Chapter***



### *San Diego Chapter*



### *Texas Chapter*



## ISSUER AMBASSADOR PROGRAM

The Issuer Ambassador Program is a membership drive used to support Chapter’s recruitment efforts and public sector professionals by providing a subsidy for an Issuer Ambassador to attend our annual conference. Issuer Ambassadors provide invaluable feedback, insights about the conference, and help enhance the issuer experience which will help WPF grow and serve one of its most important member segments. In 2025, Chapters received a subsidy of \$500 for every 5 new members added before the deadline with a cap of \$2,000 and up to 4 ambassadors. This program has been highly effective. Congratulations to the 14 participants in the program this year.



### 2025 WPF ISSUER AMBASSADORS

**Jana Brown**  
*Chief Financial Officer*  
**Intercity Transit**  
 (Olympia, WA)

**Mary Chavez**  
*Finance Director/Treasurer*  
**City of Birmingham**  
 (Birmingham, MI)

**Elizabeth Chevalier**  
*Deputy Debt Manager*  
**State of Illinois**  
 (Chicago, IL)

**Erika Coombs**  
*Division Finance Manager*  
**City of Scottsdale, AZ**  
 (Scottsdale, AZ)

**Patty Deangelis**  
*Associate Chief Legal Counsel*  
**Massport**  
 (Boston, MA)

**Kelly Decker**  
*Assistant Chief Counsel*  
**Pennsylvania Turnpike Commission**  
 (Middletown, PA)

**Cheree Gulley**  
*Executive Director*  
**Housing Finance Authority of Miami-Dade Co.**  
 (Miami, FL)

**Dinetta Hill**  
*Assistant Manager- Cash Management and Investments*  
**Virginia Department of the Treasury**  
 (Richmond, VA)

**Kathy Kardell**  
*Debt Manager*  
**Hennepin County, MN**  
 (Minneapolis, MN)

**Karin Luu**  
*Director, Financial Planning & Analysis and Debt Capital Markets*  
**The University of Chicago**  
 (Chicago, IL)

**Darla Moss**  
*Chief Financial Officer*  
**Duncanville ISD**  
 (Duncanville, TX)

**Heather Usiski**  
*Assistant Treasurer & Tax Collector, Public Finance and Investments County*  
**Los Angeles**  
 (Los Angeles, CA)

**Belinda Weaver**  
*Treasurer*  
**City of Austin**  
 (Austin, TX)

**Lisa Williams**  
*Finance Director*  
**City of Raymore**  
 (Raymore, MO)

## 29<sup>th</sup> ANNUAL NATIONAL CONFERENCE Atlanta, Georgia



WPF's 29<sup>th</sup> Annual Conference was hosted at the JW Marriott Atlanta Buckhead in Atlanta, Georgia. Over 505 registered attendees joined us for a conference on connecting, learning, networking and fun after the conference with a pickleball outing.

**KEYNOTE SPEAKERS** Keynote speakers **Lindsay Shookus** (*Legendary Saturday Night Live Producer*), **Shirley Franklin** (*Former Mayor of the City of Atlanta*), **Mo Ivory** (*Fulton County Commissioner, District 4*) and **Rachel Wilson** (*Managing Director, Wealth Management Chief Data Officer, Morgan Stanley*) shared thoughtful and inspirational messages.



**Lindsay Shookus**  
(*Legendary Saturday Night Live  
Producer*)



**Shirley Franklin** (*Former Mayor of the  
City of Atlanta*), **Mo Ivory** (*Fulton County  
Commissioner, District 4*)



**Rachel Wilson** (*Managing Director,  
Wealth Management Chief Data  
Officer, Morgan Stanley*)

## **PANEL DISCUSSIONS**

Conference attendees also benefited from two lively panel discussions with dynamic industry leaders. First, in **Public Finance, Rewired – AI, Innovation and the New Operation System** – **Megan N. Kilgore** (*City Auditor, City of Columbus, Ohio*) and **Amy Edwards Holmes** (*Partner and Principal, Homes Consulting Group*), engaged in dialogue around government AI strategy and explored how artificial intelligence is reshaping the future of public finance, from predictive analytics and real-time transparency to the modernization of legacy systems.



Second, for the **Issuer Panel - Deal or No Deal?** **Kayla MacEwen** (*Managing Director, Masterson Advisors LLC*) (Moderator) led a discussion of esteemed former Issuer Ambassadors **Jenny Kerzman**, (*Assistant Director of Treasury, City Controller’s Office, City of Dallas*), **Jyothi Pantulu** (*Assistant Director, City of San Diego’s Department of Finance*), **Jessica Skibo** (*Capital Funding Debt Manager for the City and County of Denver*), and **Malinda Parker** (*Finance Director, Jefferson County Commission*) in a discussion of how they have survived the volatility of 2025.



## **FINAL DAY ACTIVITIES: COMMUNITY SERVICE EVENT, EXERCISE & NETWORKING LUNCH AT PAINTED PICKLE**

Atlanta Mission is a nonprofit dedicated to transforming lives through Christ for those facing homelessness in Atlanta. Established in 1938, they serve over 3,400 people annually across four campuses, providing emergency shelter, meals, recovery programs, vocational training, and transitional housing to more than 1,000 men, women, and children daily. Their mission is to end homelessness one person at a time by offering personalized services like counseling, childcare, job placement, and spiritual support, helping individuals overcome challenges like job loss, addiction, or domestic violence. WPF volunteers partnered with Atlanta Mission to put together “Women’s Kits” filled with useful items for the women in Atlanta facing homelessness.



**ADDITIONAL SCENES FROM THE  
29<sup>th</sup> ANNUAL CONFERENCE**



## 2025 FOUNDERS' AWARDS RECIPIENTS



**Shirley Franklin** *Former Mayor of Atlanta*

### LIFETIME ACHIEVEMENT AWARD

**Shirley Franklin, Former Mayor of Atlanta.** Shirley Franklin was the 58th Mayor of Atlanta and the first African American woman to hold the office of a major Southern city in 2002 where she served two terms until 2009. Prior to elected office, Franklin served in the executive position Chief Administrative Officer and Chief Operating Officer in the mayoral administrations of Mayors Maynard Jackson and Andrew Young, completing 21 years of public service in 2010.

As Mayor and as city administrator, Franklin developed and led all aspects of local government of day-to-day municipal operation. Her record of accomplishment as a collaborator and partner with communities and businesses alike set the stage for the unprecedented growth of the city and region into the 21st century.

Ms. Franklin is best known for tackling major government operations, leading the city investment in critical water and airport infrastructure and promoting ethics reform. Her administration planned and executed over \$5 billion in the improvements to the water infrastructure as well as Hartsfield Jackson Atlanta International Airport. For example: In 2002, Franklin announced an initiative called "Clean Water Atlanta" to address and begin improving the city's sewer system. She led the acquisition of the Morehouse College Collection of the Martin Luther King Jr. Papers. Ms. Franklin is also known for launching the Atlanta Beltline and the Regional Commission on Homelessness by developing successful business and public sector partnerships and alliances.

Aside from her public service, Franklin has participated in community service for nearly 40 years. Most notably, she led the Board of Directors of the National Center for Civil and Human Rights for 14 years. Franklin serves on the Board of Directors of the Volcker Alliance and is a former board member of Mueller Water Products and Delta Air Lines. She is a contributor to several books: *Leaders on Ethics*, *Real-World Perspectives on Today's Business Challenges*, *Principles for a Successful Life*, *Megaregions Planning for Global Competitiveness*, and *Investing in What Works for America's Communities*.

In 2005, TIME Magazine named Franklin one of the five best big-city American mayors. In October of that same year, she was included in the U.S. News & World Report "Best Leaders of 2005" issue. Mayor Franklin was the recipient of Profile in Courage Award in 2005, issued by the John F. Kennedy Library Foundation. The foundation praised her management of the city of Atlanta during the critical period of enormous deficit and loss of public confidence in government.

## 2025 FOUNDERS' AWARDS RECIPIENTS



**She's Our Hero Award**  
Public Sector Recipient

**Jenny Kerzman**, *Assistant Director of Treasury*



**She's Our Hero Award**  
Private Sector Recipient

**Samantha Funk**, *Head of Public Finance PNC*

### SHE'S OUR HERO AWARDS

**Jenny Kerzman, Assistant Director of Treasury City of Dallas – Public Sector Recipient.** Since joining the City in 2021, Jenny has been responsible for overseeing cash management and banking services, administering the City's \$4.5 billion investment portfolio, and managing the \$6.6 billion debt program.

Jenny began her government career with the City of Arlington and served as the Assistant City Treasurer for the City of Fort Worth for over a decade. Her extensive experience also includes roles in the private sector with companies such as Crescent Real Estate Equities, CEC Entertainment, and Bimbo Bakeries USA. She holds a degree from Texas Wesleyan University and has been a Certified Treasury Professional (CTP) since 1999.

With over 30 years of experience in treasury, Jenny currently serves on the Executive Board of TX Women in Public Finance (WPF) and was honored as an Issuer Ambassador in 2024. She is also an active member of the Government Finance Officers Association (GFOA), the Government Treasurers' Organization of Texas (GTOT), and is currently serving as the Treasurer of the DFW Hispanic 100 Association.

**Samantha Funk, Head of Public Finance PNC – Private Sector Recipient.** In her role as Head of Public Finance at PNC, Samantha leads both the investment banking and traditional banking teams that focus on the origination of municipal capital solutions as well as the delivery of PNC's full banking platform to governmental, higher education and 501c3 entities. This includes the delivery and execution of bond underwriting, credit origination, treasury management and investment management solutions. Prior to this role, she served as the West Region Executive within PNC's Public Finance Group.

Throughout her tenure in the public finance industry, Ms. Funk served as the lead investment banking representative for various governments and their component units. Her financing experience includes over \$27 billion in total issuance for state and local government issuers, transportation, general government, water and sewer, municipal authorities, school districts and higher education transactions. Ms. Funk is likewise active in the public finance industry as well as the community in which she resides. Having been on the Board of Women in Public Finance from 2016 through 2019, she served as the President of the Board of the national organization in 2019 and the Immediate Past President in 2020. She has likewise served as the Board President for Ladies First, a professional organization of women engaged in the public finance industry in the Mid-Atlantic region. In 2019, she was recognized by the Bond Buyer as a Rising Star within the industry. She is a graduate of Leadership Philadelphia's Core Class of 2020, and served on the Board of Directors for the Urban League of Philadelphia as well as the Please Touch Museum in Philadelphia prior to her relocation to Phoenix in 2022. In 2023, Samantha joined the Board of the Children's Museum of Phoenix where she currently serves as the Chair of the Governance Committee. Prior to joining PNC in 2010, Ms. Funk was a member of the Public Finance Department at A.G. Edwards & Sons, Inc. and Wachovia Securities. Ms. Funk received her BA in Business and Economics from Ursinus College and an MBA in Finance from Drexel University's Lebow College of Business. Ms. Funk holds the Series 7, 63 and 53 FINRA licenses.

## 2025 FOUNDERS' AWARDS RECIPIENTS



### Claire Goodman Rising Star Award

Public Sector Recipient

**Meagan Borth**, Finance Director for the City of Merriam, Kansas

Private Sector Recipient

**Isabel Singer**, Senior Managing Consultant at PFM Financial Advisors, LLC

### CLAIRE GOODMAN RISING STAR AWARD

**Meagan Borth, Finance Director for the City of Merriam, Kansas – Public Sector Recipient.** Meagan Borth is the Finance Director for the City of Merriam, Kansas, where she leads all aspects of financial management, including budgeting, forecasting, and investment strategy. A dedicated public servant with just under seven years of experience in municipal government, Meagan has already held senior leadership roles across multiple cities, consistently driving innovation, transparency, and operational improvement. She holds a Masters of Public Administration from the University of Kansas and is known for her collaborative leadership style, fiscal expertise, and passion for ethical governance. Meagan is honored to be recognized as a 2025 Claire Goodman Rising Star, celebrating her commitment to the evolving field of public finance and her growing impact on the profession.

**Isabel Singer, Senior Managing Consultant at PFM Financial Advisors, LLC. – Private Sector Recipient.** Isabel joined PFM in 2019 and is a Senior Managing Consultant at PFM Financial Advisors, LLC in New York, NY. She specializes in financial advisory services for higher education institutions and has experience in debt structuring, credit analysis, and policy development. Isabel oversees the full lifecycle of debt transactions, from securing project approvals to negotiating pricing in dynamic markets, with a focus on optimizing capital costs. She collaborates closely with clients to understand their credit ratings and develop financial policies that align with their strategic missions. Isabel works with a wide variety of higher education institutions, from big publics to small privates across the U.S.

### PAST FOUNDERS' AWARDS RECIPIENTS

	<u>Lifetime Achievement Award</u>	<u>She's Our Hero Award</u>	<u>Claire Goodman Rising Star Award</u>
<b>2024</b>	Fiona Ma	Anna M. Tenaglia	Rupanil Jain
<b>2023</b>	Treasurer Deborah B. Goldberg	Bethany Pugh	Audrey Chu
<b>2022</b>	Ritta McLaughlin	Kathleen Belden	Toni-Marie Kahre
<b>2021</b>	Rachael Eubanks	Suzanne Beitel, Nancy J. Remar	Danielle Scott
<b>2020</b>	<i>Virtual Conference – No Awards Presented</i>		
<b>2019</b>	Darlene Green	Stephanie Tomblin	Gabriella Briceno
<b>2018</b>	Karen Daly	Emily Brock	Lori Schreckengost
<b>2017</b>	Courtney C. Shea	Robin Prunty	Nora O'Brien
<b>2016</b>	Carole L. Brown	Katie Koster	Natasha A. Holiday
<b>2015</b>	The Honorable Denise L. Nappier	Monika Suarez	Jessica Akey
<b>2014</b>	Robin L. Wiessmann	Harriet Welch	Dana Sodikoff Ringer

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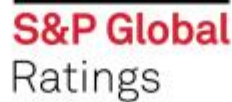
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## BECOME A WPF MEMBER TODAY

Visit <https://wpfc.com/become-member#join> to become a WPF member today and continue the vision of the WPF founders.

## JOIN THE WPF BOARD

The Board of Directors of WPF welcomes indications of interest from members willing to serve on committees and provide the ‘womanpower’ necessary to further the WPF’s mission of supporting and advancing the careers of women in public finance.

*We are always seeking dedicated, enthusiastic and creative women in the field of public finance to join the WPF Board.*

**Application Deadline:** September 30, 2026

**Selection and Notification:** December 1, 2026

**Three-Year Term Begins:** January 1, 2027

## SAVE THE DATE FOR UPCOMING WPF CONFERENCES

### 31<sup>st</sup> Annual Conference

September 15-17, 2027

Philadelphia, PA

### 32<sup>nd</sup> Annual Conference

September 20-22, 2028

TBD

### 33<sup>rd</sup> Annual Conference

September 19-21, 2029

TBD

### 34<sup>th</sup> Annual Conference

September 18-20, 2030

TBD

### 35<sup>th</sup> Annual Conference

September 17-19, 2031

TBD

WOMEN IN PUBLIC FINANCE

# *30th Annual Conference*



*Save the Date!*

**Chicago, IL**

**September 16-18, 2026**

**Women in Public Finance**  
c/o Municipal Advisory Council of Texas  
600 W. 8<sup>th</sup> Street  
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[www.wpfc.com](http://www.wpfc.com)