

Teresa Araco Rodgers

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Professional

Independent Philanthropy Advisor

harp-weaver LLC

Philadelphia, PA

March 2010 – Present

Serve as Principal and founder of harp-weaver, an independent philanthropy advisory firm. Work with individuals and families to gift to issues that matter in a meaningful way. Serve as a shared Executive Director for private family and independent foundations. Oversee grant making, board meetings, governance, and administration. Work with individuals and families to fulfill their philanthropic visions. Host Night Out With Meaning, a dinner series for women that inspires through storytelling. Co-Founder and Manager of The Exchange, Philadelphia's only co-working space for philanthropy.

Angel Investor

Investors' Circle, Philadelphia

Philadelphia, PA

July 2014 – Present

Largest and most active early-stage impact investing network. Investor Circle (IC) has propelled nearly \$200 million into over 300 enterprises dedicated to improving the environment, education, health and community. Angel investor and member of IC Philadelphia chapter. Members are responsible for vetting and coaching selected impact entrepreneurs; participating in due diligence; and incubating new initiatives and financial instruments.

Private Banking Project Lead

SEI Investments

Oaks, PA | London, England

June 2007 – June 2011

Developed the business requirements for SEI's Wealth Platform for EMEA- and UK-based firms. Lead 7-person Solution Team responsible for the creation of services for Independent Wealth Advisers in the UK. Responsibilities included: market requirements gathering and validation; business model determination; standard configuration definition; prospect support; partner identification and contracting; client implementations; general team management. Assisted with other strategic projects.

Conversion Relationship Manager

SEI Investments (Europe) Limited

London, England

January 2006 – June 2007

Managed the conversion of SEI's Wealth Platform for the first client – HSBC Private Bank. Served as client advocate and relationship manager throughout conversion process. Internal client expert to configure Platform covering all areas including Solutions, Users and Entitlements, Reporting, Rebalancing, Fee Process, and Information Access. Developed training material, documented changes in procedures, and managed internal and external validation of Platform functions and configuration.

Managing Director of Global Client Service

SEI Investments (Europe) Limited

London, England

June 2004 – December 2005

Created a team and processes to support asset management programs provided to global private banks, financial advisor firms, institutional clients and wealthy families/individual investors in the UK, Europe, South Africa and Asia representing \$7 billion in assets and \$30 million in revenue. Oversaw client service professionals who acted as primary day-to-day contacts for clients' asset management programs as it relates to investment program reporting, investment communications and marketing services, operations and administration, program management and project management. Guided and coached team members for their career development. Served as Global Program Coordinator for \$3 billion asset management program provided to HSBC Private Bank. Coordinated and liaised with groups throughout the company to drive projects for improved automation and increased efficiency, to enhance process management and to develop a sales strategy and positioning for each of the markets.

Executive Director – Philanthropy Solutions

SEI Investments

Oaks, PA

June 2001 – June 2004

New business venture for SEI Investments. Developed products, services and advice around philanthropy for nonprofits, foundations, wealthy families, and financial advisors. Served as Executive Director of SEI Giving Fund – a donor-advised fund. Other products and services included personal philanthropy support (mission definition, strategic grant making), planned giving vehicles, family foundation solution, and donor management technology. Created SEI Cares Fund as a collection vehicle for corporate and employee contributions and oversaw \$1 million + in grants. Founding Director of the SEI's Community Philanthropy Program.

Relationship Manager

SEI Investments (Europe) Ltd.

London, England

June 1999 – June 2001

Relocated to London to start-up SEI's European headquarters along with the Managing Director of the region. Set up infrastructure for headquarters including selection of PR firm, head hunting firm, office. Served as Relationship Manager for an Italian insurance company, Mediolanum. Responsible for product development, marketing initiatives, promotion, reporting, and all aspects of legal and administrative processes as the client's main SEI contact. Closed partnership deal with Bipiemme Gestioni SGR, the Italian asset management arm of Banca Popolare di Milano and co-created product, marketing material, and launch plans. Provided marketing and product planning for joint-venture asset management company in France. Researched and developed product for SEI's UK intermediary market investment solution. Selected Internet development company, responsible for SEI UK's site, which includes marketing, lead generation, and client servicing.

Product and Marketing Manager

SEI Investments

Oaks, PA

July 1995 – June 1999

Responsible for all aspects of the management of an offshore-domiciled family of funds including performance, monitoring of expenses, client communications, product enhancements, packaging, administration and client service. Worked extensively with offices around the world, distribution partners, strategic alliances, and joint ventures on all investment product issues. Managed relationship with Taiwanese joint venture partners of a Securities Investment Trust Enterprise. Liaised with various business units throughout the company on behalf of the Global Unit including: Investment Management Unit, Legal Team, SEI Trust Company, SEI Global Fund Services (Dublin, Ireland). Designed, prepared and delivered presentations in order to educate distribution partners and other alliances on SEI's investment philosophy, process and products in Asia, Latin America, Europe and South Africa. Participated in the set-up of acquisitions, joint ventures, and strategic alliances in Asia, Latin America, Europe and South Africa – specifically focused on integration, technology transfer, and education. Assisted in performing asset/liability studies for major South African and European pension plans.

Education

The American College – CAP, Chartered Advisor in Philanthropy; 2010

University of Pennsylvania, Fels Institute – MGA & Nonprofit Certificate; 2004

Lehigh University – BS, cum laude, Finance; 1995

Community

Chestnut Hill Community Association, Member

Chestnut Hill Historical Society, Member

Gwynedd Mercy Academy High School, Board Member

Kelly Anne Dolan Memorial Fund, Board President

Norwood-Fontbonne Acad. Parents' Assoc., Board Member

Memberships and Associations

Exponent Philanthropy

Mission Investors Exchange

Philadelphia Cricket Club

Philanthropy Network Greater Philadelphia

The globalislocal Fund

Women for Social Innovation

Honors and Awards

Advisors in Philanthropy CAP Scholarship, 2010

Gwynedd Mercy Academy High School Alum. Award, 2014

Kelly Anne Dolan Memorial Fund Director's Award, 2013