



**100 women in  
hedge funds®**

**Education Session No. 350:  
Politics and Your Portfolio**

June 28, 2012 at 6 PM  
Boston, MA

Political and economic rhetoric concerning the US elections and fiscal policy can often contribute to investor uncertainty and capital market volatility. This is expected to be especially true in the second half of 2012 and into 2013. Learn how to analyze the economic outlook through distinct duration lenses; our panelists will help distinguish secular (long-term) trends from cyclical (shorter-term) changes.

**Participants**

**Linda L. Lord, Esq.**, UBS Securities LLC  
**Karthik Ramanathan, Moderator**, Fidelity Investments  
**Kerry Nelson**, Skystone Capital Management  
**Nancy R. Helt**, Fidelity Investments

**Event Details**

**Date:** June 28, 2012

**Time:** 5 PM Registration.

We will begin *promptly* at 6 PM; please arrive early. Since it is disruptive to everyone when latecomers enter the session, those arriving after an education session has begun will only be admitted at the discretion of 100WHF and the host. Please note the start time on this invite and plan to arrive early.

**Host:** Pyramis Global Advisors

**Location:** Seaport Hotel (Lighthouse Room)

1 Seaport Lane Boston, **Boston**, MA 02210

**RSVP:** [RSVP Now](#)

If you have any questions about this event, please contact the [Boston](#) committee.

This event is NOT FOR ATTRIBUTION.

**Admission is free, but there is a \$25 charge if you register and do not attend, even if you cancel in advance. No-show proceeds will be donated to DonorsChoose.org, the 2012 beneficiary of 100WHF's US philanthropic initiatives.**

If you have no-show fees in arrears, the system cannot register you for an event. You can view and pay for any outstanding no-show fees online from your [Member Profile](#)

Space is limited. No walk-ins will be permitted.

## Biographies

**Linda L. Lord, Esq.**, Head, US Legislative and Regulatory Affairs, UBS Securities LLC

Ms. Lord joined UBS in 2003 and serves as Head, US Legislative and Regulatory Affairs for UBS Securities LLC. Ms. Lord publishes the "Current Issues" Report on a weekly basis and is a frequent speaker on major legislative and regulatory issues and trends, and hosts the Regulatory Dialogue Series of conference calls to discuss significant policy issues with featured guests who serve, or have served, in senior policymaking roles in Washington, DC.

Prior to joining UBS, Ms. Lord served as Chief Counsel of the United States Senate Committee on Banking, Housing, and Urban Affairs. Ms. Lord also was a partner in the Washington, D.C. office of the Venable law firm. She spent 12 years in the private practice of law in the District of Columbia, representing banking companies in regulatory compliance and transactional matters, including capital restructuring, mergers and acquisitions. She also represented officers and directors in enforcement proceedings before the Federal banking agencies. Ms. Lord's experience also includes service as an Attorney-Fellow with the Office of General Counsel, United States Securities and Exchange Commission.

Ms. Lord is a member of the Exchequer Club in Washington, DC. and of the Federal Bar Association and also served on the Executive Council of the Association's Banking Law Section. Ms. Lord also served as an advisory board member of "To the Contrary," a national news analysis and public affairs television program produced by an all woman-owned non-profit organization.

**Karthik Ramanathan**, Senior Vice President and Director of Bonds, Fidelity Investments

Mr. Ramanathan is a senior vice president and Director of Bonds for the Fixed Income Division of Fidelity Investments. Karthik assumed his current position in June 2010 and is responsible for leading the Institutional Portfolio Management team to drive fixed income product strategy and positioning internally as well as communicating that strategy externally to institutional investors.

Prior to joining Fidelity, Karthik served as Assistant Secretary for Financial Markets for the U.S. Department of the Treasury beginning in 2008. In that role, he oversaw matters involving Treasury financing, public debt management, Federal regulation of financial markets and related economic matters. From 2005 to 2008, Karthik served as Director of the Office of Debt Management for the Treasury Department and directed the issuance of over \$8 trillion in Treasury securities across bills, notes, bonds and inflation-indexed notes. Before joining the U.S. Treasury, Karthik worked at Goldman, Sachs & Co. in New York and London from 1994 to 2003, serving as vice president in the Foreign Exchange Division.

Karthik received a Bachelor of Arts degree in mathematics and economics, summa cum laude, from Columbia University in 1994.

**Kerry Nelson**, Founder/Managing Partner, Skystone Capital Management

Ms. Nelson is the Managing Partner and Founder of Skystone Capital Management ("SCM"). SCM manages Skystone Partners, LP, a hedge fund focused on the global healthcare industry.

From 2006 to 2010, Kerry managed a \$400 million joint venture with Highbridge Capital Management where she focused on small and mid cap equities with a significant tilt towards the healthcare sector. Prior to SCM, Kerry was a Portfolio Manager at Highbridge where she managed a similar portfolio. From 2001 to 2004, Kerry was a Partner and Portfolio Manager at Blum Capital Partners, where she co-managed a \$3.5 billion investment fund with both private and public equity investments. Along with one other partner, she was responsible for all trading and overall management of the portfolio. She also spearheaded the firm's healthcare investments. From 1995 to 2001, she worked at Fidelity Investments. In her most recent role, Kerry was a Portfolio Manager for the Small Cap Research Portfolio where she was responsible for a broad range of industries, including healthcare, telecom equipment, consumer products and services, and financial services. From 1998 to 2000, Kerry was the Portfolio Manager for the \$140M Select Medical Equipment and Systems Fund, a medical technology fund which she launched and solely managed.

She holds a B.A. from Cornell University.

**Nancy R. Helt**, Vice President, Benefits Policy Development, Fidelity Investments

Nancy Helt is vice president for the Benefits Policy Development Division of Fidelity Investments. Nancy joined Fidelity in January 2006 and is a team member of a group responsible for developing Fidelity's "point of view" with respect to pending legislation and regulations. She also creates and manages content for client engagement and delivers the "Washington Update" for clients, advisors and internal meetings.

Prior to joining Fidelity, Nancy served 18 years in the Retirement and Compliance Practice of Watson Wyatt and before that served five years at a law firm overseeing corporate and ERISA matters.

Nancy received a Bachelor of Arts degree from the University of Michigan, Ann Arbor and Juris Doctor from Suffolk University. Nancy's professional associations include Massachusetts Bar Association and American bar Association (tax section).



#### **About Pyramis Global Advisors**

Pyramis Global Advisors, a unit of Fidelity Investments, is an asset management firm focused on developing solutions for institutional investors, including corporate and public retirement plans, endowments, foundations, Taft-Hartley and sovereign entities worldwide. Pyramis provides expertise across a broad asset class spectrum and a rigorous risk management platform with a commitment to seeking consistent and repeatable investment performance. Pyramis' comprehensive global research coverage\* includes specialized teams with focused expertise resulting in breadth and depth of research. Pyramis is headquartered in Smithfield, Rhode Island, with additional offices in Boston, London, Hong Kong, Toronto and Montreal. As of December 31, 2011, Pyramis manages \$165.5 billion in assets for approximately 601 institutional clients around the world.

\*Research resources described herein include the combined resources of Pyramis and Fidelity Investments

#### **About 100 Women in Hedge Funds ([www.100womeninhedgefunds.org](http://www.100womeninhedgefunds.org))**

100 Women in Hedge Funds is a global, practitioner-driven non-profit organization serving over 10,000 alternative investment management investors and professionals through educational, professional leverage and philanthropic initiatives. Formed in 2001, 100 Women in Hedge Funds has hosted more than 300 events globally, connected more than 250 senior women through Peer Advisory Groups and raised over \$25 million for philanthropic causes in the areas of women's and family health, education and mentoring.