

# 2<sup>nd</sup> Annual Marketing to Latinos Banking & Financial Conference and Business Networking Event



November 29, 2012 New York City  
Bank of America Tower

## Companies Biographies

See full list of biographies below this summary

Id	Name	Last Name	Title	Company	Status
S	Monika	Mantilla	CEO	Altura Capital	Invited
M	Amanda	Smith	Owner	Amanda Smith Caterers	Confirmed
S	Judith	Cruz	Marketing Director	American Express	Invited
S	Dawn	Carrillo	VP NY Metro Marketing Manager	Banco Popular	Invited
S	Antonio	Pertinez	Senior Vice President - Consumer Marketing	Bank of America	Invited
S	Jorge	Möller	SVP Multicultural Markets Manager	BB&T Corporation	Invited
M	Carmen	Wong Ulrich	Author, TV/Print journalist Personal Finance	Carmen Wong Ulrich	Invited
S	Driss	Temsamani	Head of Marketing & Strategic Planning	Citi	Invited
S	Mike	Periu	Principal & Managing Director	Ecofin Media	invited
S	Daniel	Vasquez	Co-Founder and Managing Partner	EDM Capital Partners	Invited
S	Charles	Garcia	CEO	Garcia Trujillo	Invited
S	Juan C	Capello	Shareholder	Greenberg Traurig	Invited
S	Guillermo	Kopp	Chairman	GUAU Corporation	Invited
S	Julie	Stav	Owner	Juliestav.com	invited
M	Karla	Palomo	Journalist	Karla Palomo	Invited
C	Carlos	Vassallo	CEO	LatinVision Media	Confirmed
S	Martee	Saldaña Pierson	Director of Diversity Programs	Liberty Tax Service	Confirmed
S	Mercedes	Garcia	Multicultural Manager	MasterCard	Invited
S	Carolina	Walther-Meade	Partner	Milbank	Invited
S	Maria del P	Avila	CEO	New America Alliance	Invited
S	Eduardo	Bohórquez	Principal	Nexos Capital	Invited
S	Marcos	Rodriguez	Managing Partner	Palladium Equity Partners	Invited
S	Martin	Bueno	Co-Chairman Board of Directors	Quorum Digital Venture Partners	Invited
M	Liz	Sarachek-Blacker	Chief Revenue Officer	Terra	Invited
S	Petra	Pasquina	Vice President, Client Development	Univision Communications	Confirmed
S	Victoria	Lopez-Negrete	SVP and General Manager	Western Union	Invited
S	Julian	King	SVP of Marketing and Corporate Developmt	Xoom	Invited
	Maria	Otero	Founder and President	Women's Venture Fund, Inc.	Invited

### Conference Sites

English: [www.latinvision.com/conference/banking](http://www.latinvision.com/conference/banking)

Spanish: [www.latinvision.com/conferencia/bancos](http://www.latinvision.com/conferencia/bancos)

Become a Sponsor: [www.latinvision.com/conference/banking/sponsors.pdf](http://www.latinvision.com/conference/banking/sponsors.pdf)

Venue [Bank of America Tower](#)

This is an official event of  
The Latin Media & Entertainment Commission of the City of New York



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## Contacts

Violeta Alba  
Conference Manager  
Tel: (646) 519-3580  
Fax: (469) 533-4874  
Email: [violeta@latinvision.com](mailto:violeta@latinvision.com)

Daren McKelvey  
Director Business Development  
Tel: (617) 291-6320  
Fax: (469) 533-4874  
Email: [daren@latinvision.com](mailto:daren@latinvision.com)



Monika Mantilla, CEO, [Altura Capital](#)

Altura provides Institutional Investors with customized manager-of-managers investment solutions, investment advisory and research services to search, invest, and partner with emerging and diverse managers.

Currently Altura oversees the management of more than \$5.7 billion in assets and serves more than 12 of the largest institutional investors in the world.

Altura Capital is headquartered in New York City and has other offices in Chicago and Seattle. Altura is a Women-owned and Hispanic-owned company.



Amanda Smith, Owner, [Amanda Smith Caterers](#)

Amanda Pilar Smith is the owner and operator of Amanda Smith Caterers, a catering and event planning company established in 2002. Originally from Mexico, Amanda is a graduate of Cornell University's Hotel and Restaurant School, where she also received a Masters in Agriculture Economics.

Amanda honed her skills in Thailand, Singapore, Hong Kong, and South Africa before moving back to her native Mexico to work for the multi-national company Del Monte Fresh Produce. There she traveled from coast to coast on the hunt for quality produce to export to the United States, Europe, and Japan.

In 1996, she moved to Paris where she researched and wrote a book about the open-air food markets and their impact on the city's culture. The book, Paris in a Basket (Könemann, 2000), is fully illustrated with more than 70 recipes and 400 photographs by Amanda and co-author Nicolle Meyer.

Amanda's trademark is her commitment to using fresh ingredients and preparing them in a simple, yet sophisticated manner. This is the essence of her latest endeavor, Amanda Smith Caterers. Here, Amanda together with chef Domingo Garza, has set out to capture the flavors of New York with the spirit of her native Mexico.



Judith Cruz, Marketing Director, [American Express](#)

American Express is a global service company, providing customers with exceptional access to products, insights and experiences that enrich lives and build business success.

Each day, American Express makes it easier, safer and more rewarding for consumers and businesses to purchase the things they need and for merchants to sell their goods and services. An engine of commerce, American Express provides innovative payment, travel and expense management solutions for individuals and businesses of all sizes. Most of all, we help our customers realize their dreams and aspirations through industry-leading benefits, access to unique experiences, business-building insights, and global customer care. We enable our customers to do and achieve more.

Learn more about us at: [www.americanexpress.com](http://www.americanexpress.com)

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Dawn Carrillo, VP NY Metro Marketing Manager, [Banco Popular](#)

Founded in 1893, Popular, Inc. (NASDAQ: BPOP) is the No. 1 bank by both assets and deposits in Puerto Rico and ranks 35th largest by assets among U.S. banks. In the United States, Popular has established a community banking franchise providing a broad range of financial services and products with branches in New York, California, Illinois, New Jersey, and Florida.



Antonio Pertinez, Senior Vice President – Consumer Marketing, [Bank of America](#)

Bank of America is one of the world's largest financial institutions, serving individual consumers, small- and middle-market businesses and large corporations with a full range of banking, investing, asset management and other financial and risk management products and services. The company provides unmatched convenience in the United States, serving approximately 57 million consumer and small business relationships with more than 5,800 retail banking offices and approximately 18,000 ATMs and award-winning online banking with 29 million active users. Bank of America is among the world's leading wealth management companies and is a global leader in corporate and investment banking and trading across a broad range of asset classes, serving corporations, governments, institutions and individuals around the world. Bank of America offers industry-leading support to approximately 4 million small business owners through a suite of innovative, easy-to-use online products and services. The company serves clients through operations in more than 40 countries. Bank of America Corporation stock (NYSE: BAC) is a component of the Dow Jones Industrial Average and is listed on the New York Stock Exchange.



Jorge Möller, SVP Multicultural Markets Manager, [BB&T Corporation](#)

BB&T Corporation (NYSE: BBT) is one of the largest financial services holding companies in the U.S. with \$157 billion in assets and market capitalization of \$19.1 billion, as of March 31, 2011. Based in Winston-Salem, N.C., the company operates approximately 1,800 financial centers in 12 states and Washington, D.C., and offers a full range of consumer and commercial banking, securities brokerage, asset management, mortgage and insurance products and services. A Fortune 500 company, BB&T is consistently recognized for outstanding client satisfaction by J.D. Power and Associates, the U.S. Small Business Administration, Greenwich Associates and others. More information about BB&T and its full line of products and services is available at [www.BBT.com](#).

BB&T's operating strategy distinguishes it from other financial holding companies. BB&T's banking subsidiaries are organized as a group of community banks, each with a regional president, which allows decisions to be made locally, close to the client. This also makes BB&T's client service more responsive, reliable and empathetic.

Since 1989, BB&T has completed the acquisition of more than 63 community banks and thrifts, more than 95 insurance agencies, and 37 non-bank financial services companies. This acquisition strategy has contributed significantly to BB&T's success.



Carmen Wong Ulrich, Author, TV/Print journalist Personal Finance, [Carmen Wong Ulrich](#)

Carmen Wong Ulrich is a personal finance expert and former host of CNBC's daily personal finance show, On the Money. She is currently a contributor to The Dr. Oz Show and iVillage. Carmen is also Glamour magazine's money expert and can be seen regularly on NBC's The Today Show, MSNBC and CNN. She has enjoyed also being a regular guest on ABC's The View, NBC Nightly News with Brian Williams, as well as HLN, The Rachel Ray Show, and the CBS Early Show. In addition, Carmen has been a weeklong expert lifeline on the nationally syndicated game show Who Wants to Be a Millionaire.



Driss Temsamani, Head of Marketing & Strategic Planning, [Citi](#)

Citi, the leading global financial services company, has approximately 200 million customer accounts and does business in more than 160 countries and jurisdictions. Through Citicorp and Citi Holdings, Citi provides consumers, corporations, governments and institutions with a broad range of financial products and services, including consumer banking and credit, corporate and investment banking, securities brokerage, transaction services, and wealth management. For more information, please visit: [www.citigroup.com](#) or [www.citi.com](#).

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**EcoFin Media**

Mike Periu, Principal & Managing Director, [Ecofin Media](#)

EcoFin Media, LLC produces and markets financial literacy content for print, television, radio and online in Spanish and English. Our mission - established by our founder Mike Periu- is to empower individuals to make sound financial decisions for themselves. Our content is developed with a friendly, engaging style that informs but does not intimidate.

Daniel Vasquez, Co-Founder and Managing Partner, [EDM Capital Partners](#)

EDM Capital strives to generate top-tier, risk-adjusted returns for its investors through its dedicated team of investment professionals, strategic partnerships, network and expertise.

EDM Capital invests a percentage of its annual revenue income with microfinance programs in support of developing capital markets in the most undervalued regions and populations globally.

EDM Capital is a Registered Investment Adviser (RIA#147066) in the State of California.



Charles Garcia, CEO, [Garcia Trujillo](#)

Garcia Trujillo helps Fortune 500 and multi-national management teams to significantly grow their market share in the Hispanic market, focusing on strategy, execution, operations and organization.

Our merchant bank works with Hispanic owned companies and companies seeking to expand their presence in the Hispanic market. We connect them to non-traditional sources of capital in Latin America, and our Founding Members and our venture capital fund may also invest in their businesses.



Juan C Capello, Shareholder, [Greenberg Traurig](#)

Greenberg Traurig, LLP is an international, full-service law firm with approximately 1800 attorneys serving clients from more than 30 offices in the United States, Latin America, Europe and Asia. In the U.S., the firm has more offices than any other among the Top 10 on The National Law Journal's 2011 NLJ 250. For additional information, please visit our newsroom at: <http://www.gtlaw.com/NewsEvents/Newsroom> or Twitter at [www.twitter.com/gt\\_law](http://www.twitter.com/gt_law).

GT Locations: Albany Amsterdam Atlanta Austin Boston Chicago Dallas Delaware Denver Fort Lauderdale Houston Las Vegas London\* Los Angeles Mexico City+ Miami New Jersey New York Orange County Orlando Palm Beach County North Palm Beach County South Philadelphia Phoenix Sacramento San Francisco Shanghai Silicon Valley Tallahassee Tampa Tysons Corner Washington, D.C. White Plains.



Guillermo Kopp, Chairman, [GUAU Corporation](#)

We provide strategic consulting and research on risk management, innovation, and governance. We integrate risk and customer insights, and help you find courses of action that are creative, profitable and sustainable. Your clients, business partners, employees, shareholders, and the public deserve the best.



Julie Stav, Owner, [Juliestav.com](#)

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Karla Palomo, Journalist, [Karla Palomo](#)

Bilingual Journalist with more than 10 years of national and international experience in television, radio, print and digital media. Extensive knowledge of global affairs, business and personal finance combined with the ability to explain complex material in simple terms. Significant contacts for researching and securing high-profile interviews. Key role in editorial planning and execution coverage of local, national and international events for multiple platforms. Fluent in English and Spanish and conversant in Portuguese.



Carlos Vassallo, CEO, [LatinVision Media](#)

LatinVision Media, Inc. is a New York-based company that operates business portals targeting U.S. Hispanic and Latin American entrepreneurs, business owners, executives and professionals in small and medium-sized companies. LatinVision portals include: [www.latinvision.com](http://www.latinvision.com); [www.latinvision.com/finance](http://www.latinvision.com/finance); [www.latinvision.com/jobs](http://www.latinvision.com/jobs); [www.latinvision.com/digital](http://www.latinvision.com/digital) among others. For more information: <http://tinyurl.com/LatinVision>



Martee Saldaña Pierson, Director of Diversity Programs, [Liberty Tax Service](#)

Liberty Tax Service is the fastest-growing retail [tax preparation company](#) in the industry's history. Founded in 1997 by CEO John T. Hewitt, a pioneer in the tax industry, Liberty Tax Service has prepared over 8,000,000 individual income tax returns. With 41 years of tax industry experience, Hewitt is the most experienced CEO in the tax preparation business, having also founded Jackson Hewitt Tax Service (NYSE:JTX).

Each Liberty Tax office offers customers audit assistance, a money-back guarantee, and free tax return reviews. An elite group of [Hispanic Services Seal of Excellence Certified](#) offices also provide assistance in Spanish and offer many special services geared toward our Hispanic population free of charge, across the nation.

The Liberty Tax Service franchise opportunity is #7 on the list of [fastest-growing franchises](#) in *Entrepreneur* magazine's "Franchise 500" list for 2011, and was selected as one of the [top 25 Franchises for Hispanics](#) by *PODER* magazine.



Mercedes Garcia, Multicultural Manager, [MasterCard](#)

MasterCard's strength draws in part from its unique, three-tiered business model. Our success is built on a solid foundation—namely, our business model as a franchisor, processor and advisor.

## Franchisor

Through the thousands of financial institutions that are MasterCard's customers, the company markets a strong portfolio of brands and products worldwide, including MasterCard, Maestro®, Cirrus® and MasterCard® PayPass™. With these, MasterCard opens the door to commerce at an unsurpassed network of more than 28.5 million acceptance locations around the world and, in many cases, guarantees payment through its system.

## Processor

MasterCard's streamlined and intelligent approach to processing enables efficient commerce on a global scale. It is based on an agile network, one of the largest VPNs in the world, which offers unparalleled speed, integration, and reliability. MasterCard helps banks and merchants grow by enabling rapid adoption of new ways to pay and offering customized solutions that deliver value through technology.

## Advisor

MasterCard provides industry-leading insight and solutions that advance commerce on a global scale. Using sophisticated processing and data-mining capabilities, for example, MasterCard tracks consumer behavior and buying trends around the globe and provides that knowledge to its customers. Through MasterCard Advisors, the largest global professional services firm focused exclusively on the payments industry, the company provides strategic and operational solutions covering the payments process from end to end.

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Carolina Walther-Meade, Partner, [Milbank](#)

A leading international law firm, Milbank has helped shape the legal landscape since its founding in New York City in 1866. Influential industrialists, financiers and entrepreneurs turned to us for the strategies that empowered the economic development of the US and the world. They still do.

Around the world, in industry after industry, Milbank's outstanding record of making great things happen for clients has earned us consistently high rankings and myriad top awards. Accolades from publications like The American Lawyer, Chambers and International Financial Law Review attest to the firm's well-deserved reputation.



Maria del P Avila, CEO, [New America Alliance](#)

New America Alliance is an organization of American Latino business leaders committed to leading the process of Latino empowerment and wealth-building by expanding the forms of capital most crucial for economic advancement -- economic capital, political capital, human capital and philanthropy.



Eduardo Bohórquez, Principal, [Nexos Capital](#)

Nexos Capital Partners, LLC ("Nexos") is a Hispanic-controlled private equity firm focused exclusively on investments in smaller U.S. companies which are owned by Hispanics and/or which serve the needs of the diverse Hispanic community.

Operating from its headquarters in New York and an office in Los Angeles, Nexos evaluates investments in all parts of the United States and in Puerto Rico. The Principals of Nexos and its Strategic Advisory Board of business leaders have extensive operating expertise, which allows the firm to consider investments across a range of industry sectors.

Nexos specializes in fragmented industries with significant consolidation opportunities, which is typical of many U.S. Hispanic markets.

Nexos' "cultural capital" -- the Hispanic heritage, experience and networks of its Principals and advisors is a unique asset which facilitates finding investment opportunities in the different Hispanic communities and working closely with company managements to rapidly grow businesses.

Nexos' mission is to generate superior performance from its portfolio companies, and in so doing advancing the economic cause of the U.S. Hispanic community.



Marcos Rodriguez, Managing Partner, [Palladium Equity Partners](#)

Palladium Equity Partners provides equity capital to companies seeking to grow, restructure or provide liquidity for shareholders. Palladium principals have invested more than \$2.5 billion of equity in over 60 companies in the last two decades while developing a distinguished track record of successful partnerships with management teams. Formed in 1997, the firm currently has in excess of \$1 billion of committed equity capital.



Martin Bueno, Co-Chairman Board of Directors, [Quorumm Digital Venture Partners](#)

Quorumm Digital Ventures, was created in 2007 as a Global Venture Capital and Accelerator platform with over \$500 Million under management searching for leading Entrepreneurs in the Digital Marketing and Social Media landscape. Our investment focus is on Early Stage Ventures and Ideas in the high-growth Digital Sector that demonstrate Innovative Business Models and have unique Management Team capabilities. The firm's partners have been Active Investors and Entrepreneurs in the digital sector for over 15 Years with a solid track record Investing and Accelerating companies at global level.

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Liz Sarachek-Blacker, Chief Revenue Officer, [Terra](#)

Terra is the largest Latin American online media company, ranked as the 31st most popular internet destination in the world. Offering Entertainment, News and Sports to the 70 million people who visit its portals monthly, Terra was named by Fast Company in 2011 as one of the most innovative company in the music area, "for a multipronged, and profitable, music-focused content model". Terra is a Grupo Telefonica company.



Petra Pasquina, Vice President, Client Development, [Univision Communications](#)

Univision Communications Inc. is the premier Spanish-language media company in the United States. Its operations include Univision Network, the most-watched Spanish-language broadcast television network in the U.S. reaching 95% of U.S. Hispanic Households; TeleFutura Network, a general-interest Spanish-language broadcast television network, which was launched in 2002 and now reaches 85% of U.S. Hispanic Households; Galavisión, the country's leading Spanish-language cable network; Univision Studios, which produces and co-produces telenovelas, reality shows, dramatic series and other programming formats for all of the Company's platforms; Univision Television Group, which owns and operates 62 television stations in major U.S. Hispanic markets and Puerto Rico; Univision Radio, the leading Spanish-language radio group which owns and/or operates 68 radio stations in 16 of the top 25 U.S. Hispanic markets and 5 stations in Puerto Rico; and Univision Interactive Media, which includes [www.univision.com](http://www.univision.com), the premier Spanish-language Internet destination in the U.S., and Univision Móvil, the industry's most comprehensive Spanish-language suite of mobile offerings.

Univision Communications also has a 50% interest in TuTv, a joint venture formed to broadcast Televisa's pay television channels in the U.S. Univision Communications has television network operations in Miami and television and radio stations and sales offices in major cities throughout the United States. For more information, please visit [www.univision.net](http://www.univision.net)



Victoria Lopez-Negrete, SVP and General Manager, [Western Union](#)

The Western Union Company (NYSE: WU) is a leader in global payment services. Together with its Vigo, Orlandi Valuta, Pago Facil and Western Union Business solutions branded payment services, Western Union provides consumers with fast, reliable and convenient ways to send and receive money around the world, to send payments and to purchase money orders. The Western Union, Vigo and Orlandi Valuta branded services are offered through a combined network of 455,000 Agent locations in 200 countries and territories.

In 2010, The Western Union Company completed 214 million consumer-to-consumer transactions worldwide, moving US\$76 billion of principal between consumers, and 405 million business payments.

For more information, visit [www.westernunion.com](http://www.westernunion.com) .



Maria Otero, Founder and President, [Women's Venture Fund, Inc.](#)

The Women's Venture Fund is a non-profit organization that helps women of diverse backgrounds establish thriving businesses in urban communities. WVF offers training, small business loans, and a network of business advisors to help women reach their business goals. By troubleshooting specific challenges and encouraging women to share their experiences with other entrepreneurs, WVF is able to expedite the growth of businesses participating in our programs.



Julian King, SVP of Marketing and Corporate Development, [Xoom](#)

XOOM is revolutionizing the international money transfer market by providing people with an easy, convenient, cost-effective, and safe means of sending money worldwide. XOOM currently serves 45+ countries, is growing rapidly and is backed by top Silicon Valley investors.