

SPEAKER BIOGRAPHIES

Jamie Dimon, Chairman & Chief Executive Officer



Jamie Dimon is Chairman of the Board and Chief Executive Officer of JPMorgan Chase & Co., a global financial services firm with assets of \$2.5 trillion and operations worldwide. The Firm is a leader in investment banking, financial services for consumers, small business, commercial banking, financial transaction processing and asset management.

Dimon became CEO on January 1, 2006 and one year later also became Chairman of the Board. He was named President and Chief Operating Officer upon the company's merger with Bank One Corporation on July 1, 2004. Dimon joined Bank One as Chairman and CEO in 2000.

Dimon began his career at American Express Company. Next, he served as Chief Financial Officer and then President at Commercial Credit, which made numerous acquisitions and divestitures, including acquiring Primerica Corporation in 1987 and The Travelers Corporation in 1993. Dimon served as President and Chief Operating Officer of Travelers from 1990 through 1998 while concurrently serving as Chief Operating Officer of its Smith Barney Inc. subsidiary before becoming co-Chairman and Co-CEO of the combined brokerage following the 1997 merger of Smith Barney and Salomon Brothers. In 1998, Dimon was named President of Citigroup Inc., the global financial services company formed by the combination of Travelers Group and Citicorp.

Dimon earned his bachelors degree from Tufts University and holds an MBA from Harvard Business School. He serves on the boards of directors of a number of non-profit institutions including the Clearing House and Harvard Business School. Additionally, he is the Chairman of the Business Roundtable and serves on the executive committee of the Business Council and the Partnership for New York City, and is a member of the Financial Services Forum, Financial Services Roundtable and Council on Foreign Relations.

Marianne Lake, Chief Financial Officer



Marianne Lake is the Chief Financial Officer of JPMorgan Chase & Co. and a member of the Firm's Operating Committee. JPMorgan Chase & Co. is a global financial services firm with assets of over \$2.5 trillion and over 240,000 employees. The firm serves millions of consumers in the United States and many of the world's most prominent corporate, institutional and government clients under its J.P. Morgan and Chase brands.

Lake previously was the Chief Financial Officer of Consumer & Community Banking at JPMorgan Chase from 2009 to 2012. From 2007 to 2009, Lake served as the Investment Bank's Global Controller.

From 2004 to 2007, Lake was in the Corporate Finance group managing global financial infrastructure and control programs. Prior to 2004, Lake worked at both Chase and J.P. Morgan in London in various roles and started her career as a chartered accountant.

Lake received a Bachelor of Science degree in Physics from Reading University in the United Kingdom. She is on the Board of Directors for the JPMorgan Chase & Co. Foundation as well as the New York City Ballet.

Douglas Petno, Chief Executive Officer – Commercial Banking



Doug Petno is the Chief Executive Officer of Commercial Banking, one of the Firm's four lines of business. He reports to JPMorgan Chase Chairman and CEO Jamie Dimon and is a member of the Firm's Operating Committee.

Commercial Banking has more than 8,000 professionals in 122 locations across the U.S. and 23 major international cities. Its team members are entrenched in the communities and dedicated to the clients they serve.

With a focus on its local presence, Commercial Banking delivers industry leading capabilities and comprehensive financial solutions from across the Firm while never compromising on service or customer experience.

The business serves ~18,000 clients nationally, including mid-sized businesses and corporations, government entities and not-for-profit organizations and ~37,000 real estate investors/owners.

Petno has more than 25 years of experience at the Firm, most recently as global head of J.P. Morgan's Natural Resources Investment Banking Group, where he oversaw client coverage for Oil & Gas, Power & Utilities, Chemicals, Metals & Mining, Building Products, and Paper & Packaging. He joined Commercial Banking in 2010 as Chief Operating Officer and then became the Chief Executive Officer in 2012.

Passionate about the environment, Petno currently serves on the Advisory Board for NatureVest, a new initiative at The Nature Conservancy. He received a Bachelor of Arts degree in Biology from Wabash College and holds a Master of Business Administration from the University of Rochester's Simon School of Business and was awarded their Distinguished Alumnus Award in 2013.

Daniel Pinto, Chief Executive Officer – Corporate & Investment Bank



Daniel Pinto is CEO of J.P. Morgan's Corporate & Investment Bank, an industry leader in investment banking, trading markets and investor services such as cash management, clearing and prime brokerage. He is a member of the firm's Operating Committee, and also CEO of the firm's Europe, the Middle East and Africa (EMEA) region.

Daniel has spent his career at J.P. Morgan and its predecessor companies. He began his career at Manufacturers Hanover in 1983 as a financial analyst and foreign exchange trader in Buenos Aires. In 1992, he was appointed head of Sales for Chemical Bank in Buenos Aires, responsible for clients in Argentina, Uruguay and Paraguay. Shortly after, he became head trader and Treasurer of Chemical Bank in Mexico. Daniel moved to London in 1996 to oversee local markets in Eastern Europe, the Middle East, Africa and Asia for Chase Manhattan.

In 2002, Daniel became head of the markets side of J.P. Morgan's emerging markets business, and was made global head of Emerging Markets in early 2006. He was given added responsibility for the Global Credit Trading & Syndicate business in early 2008. In 2009, he was made co-head of Global Fixed Income for the Investment Bank before becoming sole head of the group in 2012. He was also made co-CEO of the Corporate & Investment Bank in 2012, and became sole CEO in 2014.

Daniel holds a bachelor's degree in Public Accounting and Business Administration from Universidad Nacional de Lomas de Zamora in Buenos Aires.

Mary Callahan Erdoes, Chief Executive Officer – Asset & Wealth Management



Mary Callahan Erdoes is Chief Executive Officer of J.P. Morgan's Asset & Wealth Management division, a global leader in investment management and private banking with \$2.5 trillion in client assets. She is also a member of JPMorgan Chase & Co.'s Operating Committee.

Ms. Erdoes joined J.P. Morgan in 1996 from Meredith, Martin & Kaye, a fixed income specialty advisory firm. Previously, she worked at Bankers Trust in corporate finance, merchant banking and high yield debt underwriting.

Ms. Erdoes is a board member of Robin Hood, the U.S. Fund for UNICEF, and the U.S.-China Business Council. She also serves on the Federal Reserve Bank of New York's Investor Advisory Committee on Financial Markets.

Ms. Erdoes is a graduate of Georgetown University (B.S., Mathematics) and Harvard Business School (M.B.A.). She lives in New York City with her husband and three daughters.

Gordon Smith, Chief Executive Officer – Consumer & Community Banking



Gordon Smith is the CEO of Consumer & Community Banking at Chase.

The business has more than 130,000 employees serving 60 million households and 4 million small businesses. The business is a leading provider of banking, credit cards, auto finance, payments, mortgages and investment advice. He reports to JPMorgan Chase Chairman and CEO Jamie Dimon and is a member of the Firm's Operating Committee.

Chase has more than 5,200 bank branches (#2 branch network) and nearly 18,500 ATMs (#1) across 23 states in the U.S. Chase is the #1 U.S. credit card issuer and the #2 mortgage originator and servicer in the country. Chase.com is the most-visited banking portal in America with 44 million active online users, including 27 million mobile users.

Smith joined Chase in June 2007. He served as CEO of the Card, Merchant Services and Auto Finance business before taking on his current role in 2012.

Before joining Chase, he spent more than 25 years at American Express, where he led and managed several businesses, including the U.S. Domestic Consumer Card Business. From August 2005 until June 2007, he was President of the Global Commercial Card business, with responsibility for corporate cards and corporate purchasing cards across more than 30 countries.

Smith serves on the Board of Directors for both Choice Hotels International Inc. and Nordstrom Inc. He is also on the Board of the International Rescue Committee, which responds to the world's worst humanitarian crises and helps people to survive and rebuild their lives. He holds a master's degree from the Thunderbird School of Global Management.

He is married with two grown children and lives in New Jersey.

Mike Weinbach, Chief Executive Officer – Mortgage Banking



Mike Weinbach is the CEO of Mortgage Banking.

Chase is one of the largest U.S. providers of banking, lending, treasury, wealth management and investment services. Chase serves 60 million households, including consumers, small businesses, mid-size companies, corporations, financial institutions, nonprofits and governments. Chase's Mortgage Banking business is ranked No. 2 in originations and in servicing.

In Mike's previous role as Head of Servicing, he managed a portfolio of 6.3 million mortgages representing a combined balance of more than \$900 billion. He oversaw the servicing of performing loans, loan transfers and programs to help customers who may be struggling.

Prior to joining Mortgage Banking, Mike was responsible for Sales in Consumer Banking and held a similar role in Business Banking. He also served as CFO for Consumer Banking and Product & Pricing CFO for Chase Auto Finance.

Prior to Chase, he operated a small business specializing in workforce motivational products and services and held senior roles at Citigroup in New York.

Mike graduated from the Wharton School at the University of Pennsylvania and earned his MBA at Harvard Business School.

Thasunda Duckett, Chief Executive Officer – Consumer Banking



Thasunda Brown Duckett is the CEO of Consumer Banking.

She leads the nation's second largest branch network with more than 5,200 branches and the #1 ATM network in the U.S. with nearly 18,500 ATMs. Duckett is also responsible for serving the banking and wealth management needs of 24 million households nationwide and overseeing a deposit franchise that has grown more than twice the industry average since 2012.

Duckett was previously the CEO of Chase Auto Finance, one of the leading bank providers of auto financing in the country, with a portfolio of more than \$60 billion in assets and relationships with 75% of U.S. franchised automotive dealers. Under her leadership, Chase Auto Finance moved from #27 to #1 in Prime and Non-Prime Dealer Satisfaction in the J.D. Power Dealer Financing Satisfaction Survey.

Prior to her role as CEO of Chase Auto Finance, Duckett served in a number of senior leadership roles in Chase Mortgage Banking, including National Retail Sales Executive, Channel Executive for Branch Mortgage Integration, and Director of Affordable Lending and Emerging Markets.

Before joining JPMorgan Chase, Duckett was a Director of Emerging Markets at Fannie Mae.

Duckett is a native of Texas. She holds a Bachelor's degree in Finance and Marketing from the University of Houston, and an MBA from Baylor University. She is married and has four children. She and her family live in Connecticut.

Jennifer Piepszak, Chief Executive Officer – Card Services & Business Banking¹



Jennifer Piepszak is the CEO of Card Services, which includes Chase's consumer, small business and commercial card businesses. Chase is the number one credit card issuer in the United States based on sales volume and loans outstanding.

Jenn has been with JPMorgan Chase for 23 years, the last six in the firm's Consumer & Community Banking division. Prior to becoming CEO of Card Services in February 2017, Jenn was CEO of Business Banking which serves 2.5 million U.S. small businesses and was Chief Financial Officer for Mortgage Banking prior to that.

During Jenn's first 17 years at the firm, she held progressively responsible roles in the Corporate & Investment Bank serving as Controller for Global Equities and Prime Services, CFO and Controller for the Proprietary Positioning Business and Principal Investments Management, and CFO for the Investment Bank Credit Portfolio as well as several Fixed Income markets businesses.

Jenn holds a Bachelor of Science degree from Fairfield University. She serves on the board of directors for Embrace Kids, a New Jersey non-profit foundation that provides support to families whose children are facing serious health challenges. Jenn and her husband have three children and live in New Jersey.

¹ While the management team conducts a thorough process to identify Jenn's successor in Business Banking, Jenn will do both CEO roles until a successor is named