

# The Women of CCM

March 2024



# The Women of CCM

We are pleased to share our sixth report on the women of CCM. Despite the gender gap that persists in the asset management industry, women comprise 61% of our employees and 57% of our investment team.<sup>1</sup> In this report, you will find compelling insights into the roles, responsibilities, and accomplishments of our talented women across various departments and levels within the organization.

In honor of Women's History Month, this report serves as a celebration of our ongoing commitment to creating an inclusive workplace where every individual feels valued, empowered, and supported in reaching their full potential. By amplifying the voices and experiences of our women employees, we aim to inspire future generations and foster a culture of equality and opportunity for all.



**Alyssa Greenspan, CFA**  
CEO and President



of team members  
are women



of women team  
members are  
people of color



of the investment  
team are women



of the firm board  
are women



There is no limit to what we,  
as women, can accomplish.

— Michelle Obama

<sup>1</sup> As of 3/25/2024

## MEET THE WOMEN OF CCM

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**Alyssa Greenspan, CFA**  
CEO and President

Alyssa began her career at CCM on the investment team as a portfolio manager before becoming chief operating officer in 2009, president in 2015, and most recently, CEO, in 2023. Alyssa has oversight responsibilities for CCM's operating business, including its strategic direction and investment strategies. In addition, Alyssa is responsible for managing the operations of the firm as well as overseeing risk management, compliance, and client service. As an impact and ESG industry veteran, Alyssa is a frequent speaker on the topic and has been involved in the creation of detailed impact metrics and customized reporting at CCM, working closely with clients to understand both their impact and investment goals. Alyssa enjoys giving back to her community and is actively involved in the Junior Achievement Circle of Wise Women, Women United of Broward County, and the Women's Executive Circle of the Jewish Federation of Broward County YWCA Racial Justice League.



*CCM's approach looks to make a positive impact to communities nationwide. It's an honor to help our clients invest into their communities and/or along with their missions, impact objectives, or faiths. Being involved with impact investing has encouraged me to give back and be more active in my local community.*

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**30 years**  
in the investment  
industry

**21 years**  
at CCM

Serves on CCM's Board of Directors, Compliance Committee, DEI Committee, Impact and CRA Committee, Enterprise Risk Management Committee, and Investment, Trading & Valuation Committee.

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*There are many highlights of my time at CCM but one that stands out is when the firm crossed \$1 billion in assets. It was an historic milestone, especially in 2009 during a time of widespread economic crisis. Reaching \$1 billion shortly after hitting our 10-year track record felt like we had officially graduated from an emerging manager to a respected and well-known staple among institutional investors.*

**Jamie Horwitz**  
Chief Marketing Officer



Jamie joined CCM in 2005 as a sales and marketing assistant upon relocating from New York City where she previously worked in the marketing department for an investment bank. She was promoted to director of marketing in 2012 and chief marketing officer in 2015. She is responsible for developing and implementing the firm's overall positioning in the market and has written a variety of reports on impact and ESG investing including gender lens, sustainable investing, affordable housing, racial equality, and place-based impact investing.

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**26 years**  
in the investment industry

**19 years**  
at CCM

Serves on CCM's Board of Directors, Impact and CRA Committee, and Investment, Trading & Valuation Committee.

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**Maria Leon**  
Client Service Manager

Since joining CCM in 2008, Maria has always played an integral role in the operational and administrative areas of the firm. Due to her strong work ethic, she worked her way from office coordinator to the client service side. Maria was promoted to client service manager in 2020, where she is responsible for assisting with all facets of client servicing including updating client information, monitoring the progress of the account opening process, and working with clients to resolve any issues.



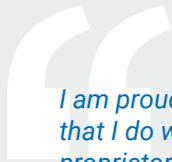
*What I have loved the most during my time at CCM is our involvement in supporting and assisting communities in need and the positive impact our investments have on them.*

**15 years**

in the investment industry

**15 years**

at CCM



*I am proud of the work that I do with CCM. As the proprietor of a woman-owned business, I can personally attest to CCM's leadership and how they embrace impact in all forms. They were the impetus to starting my own firm and have been extremely supportive business partners.*

**Stefanie Little**  
Chief Compliance Officer



Stefanie has served as CCM's outsourced chief compliance officer since 2010. She is responsible for overseeing all firm- and mutual fund-related compliance. She works closely with CCM regarding regulatory developments and best practices to help integrate such practices into the firm's business.

**25 years**

in the investment industry

**13 years**

as CCM's outsourced CCO

Serves on CCM's Compliance Committee and Enterprise Risk Management Committee



**Jessica Botelho**  
Director of Impact and CRA Research

Jessica joined CCM in 2013 and took on the role of overseeing and managing all impact and CRA research and reporting. She develops measurement tools, aggregates and analyzes impact and CRA data, and contributes to the development and refinement of CCM's proprietary impact tracking database. She provides clients with comprehensive information on the positive impact outcomes of their fixed income investment portfolios and how it is furthering their specified impact investment goals. She also works closely with bank clients for their CRA investment test needs including CRA documentation and fulfillment, proactive summary earmarking letters prior to a bank's CRA exam, and maintaining relationships with federal regulators.



*I love our team, our mission, and the impact we have. Also, the clients – we are extremely fortunate to work with such mission-driven, wonderful people.*

**18 years**

in the investment industry

**11 years**

at CCM

Serves on CCM's Board of Directors and is co-chair of the firm's Impact and CRA Committee.



**Allison Glansberg**  
Credit Analyst

Allison joined CCM in 2017 as a client services associate, and in January 2020, she transitioned to the investment team to join the firm's analyst program. Upon completing the analyst program in 2022, she became a credit analyst where she assists all aspects of the corporate and municipal credit review process. Her responsibilities include analyzing and monitoring individual credits while seeking out relative value opportunities in the space.

**7 years**

in the investment industry

**7 years**

at CCM



*CCM's collaborative culture has been central to my experience. Since my first day at the firm, I have been greeted with a generosity of knowledge, passion, and innovation.*



*At CCM we learn a lot from one another, but most of all, we have fun bringing solutions to our clients and soon-to-be clients.*

**Kristin Fafard, CFA**  
Chief Investment Strategist



Kristin joined CCM's investment team in early 2018 to help strengthen strategic relationships with national and regional consultants, communicate CCM's value-added market and investment insights, and serve as an investment product specialist. Prior to joining CCM, Kristin spent 25 years leading investment manager research and client consulting, making her well-versed in the unique needs of consultants and large institutional investors. She serves on the steering committee for Women for UMASS Amherst and is a voting member of the investment committee for the United Nations Foundation.

**34 years**

in the investment industry

**6 years**

at CCM

Serves on CCM's Investment, Trading and Valuation Committee



**Barbara Seaman**  
Client Portfolio Manager

Barbara relocated to South Florida in 2018 from New York City and joined CCM as a sales and marketing specialist where she supported all aspects of sales and marketing. In 2024, Barb became a client portfolio manager as the firm's Southeast wholesaler with a primary focus on large advisory channels. Barbara develops key relationships with financial advisors to create new business, provide sales and marketing updates, and share technical details on CCM's investment products and services.

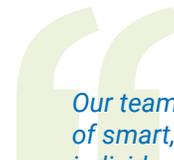
**13 years**

in the investment industry

**5 years**

at CCM

Serves on CCM's Compliance Committee



*Our team is comprised of smart, motivated individuals who are truly passionate about the firm and impact investing. It is exciting to be a part of a financial organization that can quantifiably show its investments' positive impacts in addition to traditional financial returns.*



## Martha Schuman

Senior Client Portfolio Manager

Martha joined CCM in April of 2019 as CCM's first west-coast based wholesaler in California with a primary focus on large advisory channels. Martha develops key relationships with financial advisors to create new business, provide sales and marketing updates, and share technical details on CCM's investment products and services. Martha is a seasoned investment professional with more than two decades of experience in the investment management industry and is active in her local community and the Episcopal Church serving on the Vestry.

**34 years**

in the investment industry

**5 years**

at CCM



*Living in California, I am acutely aware of the problems of homelessness and its effect on our most vulnerable members of society including seniors, veterans with disabilities, and people suffering from mental illness. Having spent my professional life in the investment management field, I am grateful to now be a part of CCM and am inspired by the investments we make and their positive outcomes to people and communities in need.*



*By investing in bonds that finance projects for affordable housing, schools, and environmentally sustainable initiatives like clean water, we can sleep well at night knowing CCM is helping to make our communities a better place for all.*

## Priscilla Lozevski

Head of Operations



Priscilla relocated to South Florida in 2019 from New York City and joined CCM as an operations specialist responsible for all middle and back office functions. She was promoted to Head of Operations in 2020. Priscilla handles daily reconciliation, settlements, cash management, and reporting for all of CCM's mutual funds and separate accounts. She also oversees the firm's trade processes, data, and portfolio management functions. Her previous experience includes operations and trading positions at Lehman Brothers Holdings, Inc., Citi and Bear Stearns.

**22 years**

in the investment industry

**5 years**

at CCM

Serves on CCM's DEI Committee



## Shonali Pal

Portfolio Manager

Shonali joined the CCM team in 2020 as an investment analyst and was promoted to junior portfolio manager in 2022 upon completing the analyst program. At the end of 2023, Shonali was promoted to portfolio manager with generalist and securitized responsibilities. Shonali is responsible for building and maintaining investment portfolios focused heavily in the securitized sectors and performance reporting at the composite levels. She assists with researching investment opportunities for their environmental and social impacts as well as community development activities that meet the Community Reinvestment Act (CRA).



*I am passionate about ESG investing and am thrilled to be at a firm that incorporates impact criteria into its investment strategy. The CCM team is full of thoughtful, smart, and passionate individuals that are dedicated to our firm's mission.*

**9 years**

in the investment industry

**4 years**

at CCM



## Amina Rubin Impact Research Analyst

Amina joined CCM's investment team in 2020, responsible for conducting impact and ESG research and articulating the positive impacts of securities purchased on behalf of CCM's clients. This includes writing detailed summary reports on the environmental and social impacts of the firm's fixed income holdings, tracking quantitative impact metrics, and creating impact reports for shareholders. Amina previously worked in the impact investment industry where she started a shareholder advocacy program, voted proxies, and pushed for corporate accountability on ESG issues.



*I love working with people who genuinely care about the impact of our investments. I feel uplifted when I research a great impact story, and I especially appreciate supporting investments that benefit people who are vulnerable or underserved.*

**9 years**

in the investment industry

**4 years**

at CCM

Serves on CCM's  
DEI Committee



*At CCM, I love working with thoughtful, smart, and passionate individuals, and enjoy working on enterprise solutions to achieve CCM's portfolio management and trading requirements.*

## Yuhong Wang Software Application Developer

Yuhong joined CCM in 2022 with extensive financial software design and development in the asset management industry. As a senior application developer, Yuhong develops and deploys scalable enterprise data solutions related to CCM's portfolio management, trading, and impact platform. Her responsibilities include building and enhancing software that captures and distributes real time market data, tracks portfolios, integrates order and execution systems, and develops interactive analytical tools to be used by the investment team. She collaborates with internal partners, including the investment team, senior leadership, and business development collateral.



**27 years**

in the investment industry

**1.5 years**

at CCM



## Miriam LeGrand Director of Research/Portfolio Manager

Miriam joined CCM in 2022 with extensive experience in credit research. She conducts economic and credit research to support investment and risk management decision making for investment grade corporate securities and taxable municipals. She analyzes individual credits, portfolio credit risks, liquidity profiles, and relative value opportunities and helps the investment team source impact investment opportunities. As an integral part of the investment team, Miriam manages the firm's core fixed income products, including the flagship CCM Community Impact Bond Fund and separately managed accounts.



*I am excited I joined a thoughtfully growing leading impact investment manager. It was important for me to make my next career move purposeful and intentional. The portfolio is fully integrated, with our proprietary impact themes aligned with each investment holding. It's been gratifying reading the financials and seeing how the bond proceeds will benefit the communities we are investing in nationwide.*

**23 years**

in the investment industry

**1.5 years**

at CCM



**Adele MacEwen**  
Impact Research Analyst

Adele joined CCM in 2022 upon completing her master’s in sustainability management from Columbia University. As an impact research analyst, she researches and writes impact investment summary reports, including articulating the positive impact outcomes of securities to society and tracking relevant quantitative impact and ESG metrics. She also works closely with IT, marketing, and the investment team in overseeing client impact reports, including quality assurance with respect to impact data points, impact themes, and impact stories.

**3 years**

in the investment industry

**1.5 years**

at CCM



*In a field that's been historically oversaturated with men, it's exciting and inspiring to be surrounded by so many accomplished women. The female representation at CCM brings invaluable diversity, and I am thrilled to be a part of the team.*



*I grew up volunteering with many non-profits in Boston, so it has always been my priority to work for a company that is passionate about paying it forward. At CCM, I am lucky to be a member of a community that cares about having a positive impact through its investments in addition to helping and supporting underserved neighborhoods and people through volunteering.*

**Victoria Reseska**  
Manager of Consultant and Platform Relations

Victoria joined CCM in 2022 as a consultant relations specialist having worked as a network relationship management associate and operations specialist in the investment industry. In 2023, she was promoted to manager of consultant and platform relations where she is responsible for building and managing the firm’s consultant relationships and investment platform networks. She works to enhance existing relationships by effectively communicating CCM’s impact investing strategies and helps with the sourcing of new opportunities within current and prospective distribution channels. She is also responsible for writing, developing, and editing end-to-end content for investment management questionnaires, including formal RFPs/DDQs.



**8 years**

in the investment industry

**1.5 years**

at CCM



**Ilyne Barton**  
Chief of Staff

Ilyne joined CCM in 2023 as chief of staff with extensive experience in accounting, finance, office management, and operations. In her new role, she supports the executive team with day-to-day operations of the firm. She collaborates with the executive team to determine and prioritize business strategies, helping to solve core problems or opportunities with business processes. She additionally provides support for special projects and initiatives, including company events and employee engagement activities and trainings.



*CCM is filled with the most intelligent, hardworking, and compassionate team members that genuinely care not only about the firm’s clients but one another. I am thrilled to be surrounded by incredible and talented individuals and to join the impact investing industry.*

**23 years**

in the investment industry

**1.5 years**

at CCM



**Mona Sang**  
Data and Reporting Analyst

Mona joined CCM as an intern in May 2022 and continued her internship throughout her final semester of her master’s program at Tulane University, where she received her master’s in business analytics. As a data and reporting analyst, Mona builds and enhances software that extracts financial data across systems, interprets results for presentations and RFPs, and generates investment reports across firm portfolios. She works with third party platforms to provide statistical support and quality assurance analytics for marketing and portfolio management. Mona collaborates across CCM teams, including investments, marketing, sales, and operations.



*CCM is my first official job from internship to full-time employee and I've already learned so many things as a data analyst and continue to learn about the investment industry. I'm proud to be a part of the CCM family.*

**1 year**

in the investment industry

**1.5 years**

at CCM



*At CCM, I'm surrounded by a group of amazing women who are not only incredibly smart, but also incredibly kind. I love being part of a dynamic team where everyone's unique talents come together to create something extraordinary. Working with exceptional women isn't just a job; it's a feeling of belonging where we can support each other while also creating positive and lasting impacts internally and externally.*

**Rebecca Newbold**  
Office Manager



Rebecca joined CCM in 2023 as officer manager where she oversees and supports all administrative duties to ensure that the office is operating smoothly. She serves as the primary liaison for vendor relations, including office technology, and manages office supplies inventory. Rebecca provides direct administrative support and helps review and improve administrative systems, policies, and procedures.

**<1 year**

in the investment industry

**<1 year**

at CCM



**Jenny Kwon**  
Impact Research Analyst

Jenny joined CCM in 2023 after working at Barclays in New York City as an equity derivatives sales trader. As an impact research analyst, Jenny is responsible for researching and writing impact investment summary reports including articulating the positive impact outcomes of securities to society and tracking relevant quantitative impact and ESG metrics. She also assists with all facets of client servicing for institutional investors, including updating client information, monitoring the progress of the account opening process, and working with clients to resolve issues. Jenny works closely with IT, marketing, and the investment team in overseeing client impact reports including quality assurance with respect to impact data points, impact themes, and impact stories.



*I believe all investing should be intentional. I am proud to be a part of CCM because not only do we invest intentionally to have an impact in our communities, but we are also intentional about diversity in our workplace. Being surrounded by women who are passionate about their intentionality and are driving forces in the investing space is an incredible experience.*

**2 years**

in the investment industry

**<1 year**

at CCM



**Risa Solomon**  
Assistant Controller

Risa joined CCM in 2023 with over 20 years of experience in accounting. As assistant controller, Risa assists the CFO with the management of all accounting operations, preparing the budget and financial forecasts, and publishing timely monthly financial statements. She coordinates the preparation of regulatory reporting, including annual and periodic program review audits, and supports month-end and year-end close process. Risa ensures quality control over financial transactions and reporting, while managing and complying with local, state, and federal government reporting requirements and tax filings. She also develops and documents business processes and accounting policies to maintain and strengthen internal controls.



*After successfully running my independent accounting business for several years, I was excited to start a new opportunity and career path. The CCM team welcomed me with open arms and made my transition remarkably smooth. It is wonderful to have joined such an impactful and inspiring organization.*

**<1 year**

in the investment industry

**<1 year**

at CCM



*CCM inspires inclusion by embracing diversity in all aspects at work and in our personal lives. It is empowering to be working for a company that makes investments with positive impacts in our community and it's wonderful to work with such great woman as colleagues' side by side who are so passionate and dedicated.*

**Frances Llano**  
Senior Operations and Compliance Manager

Fran joined CCM in 2023 from Citi where she was vice president of business risk and controls. In her role at CCM, Fran is responsible for middle- and back-office functions as well as managing day-to-day cash and reconciliation reports, trade settlement, cash management, and various reporting for CCM's mutual funds and separate accounts. She also supports the firm's trade processes, data management, and portfolio operations and is responsible for overseeing firm- and mutual fund-related compliance, as well as regulatory reporting developments, requirements, and best practices.



**24 years**

in the investment industry

**<1 year**

at CCM

