WCNJ Webinar Thursday, June 11

How to Invest During a Pandemic

Date and Time: Thursday, June 11, 1:30 pm - 2:30 pm on Zoom

Please join us for a panel discussion on how to invest during a pandemic situation. We have put together a great panel of leaders and experts in the field. The topics of discussion will include:

1) Macroeconomic review, general trends
2) How to invest if you are in your 30s/40s/50s
3) How to invest if you need to catch up for your retirement
4) What are contrarian investment ideas with a view towards the future?

Please bring your pressing questions and get answers from leading experts!

About Our Panelist: Christopher Geczy

Professor Christopher Geczy is Adjunct Professor of Finance at the Wharton School. He is also the Academic Director of the Wharton Wealth Management Initiative, and Academic Director of Jacobs Levy Equity Management Center for Quantitative Financial Research. To learn more about Professor Geczy, please visit his Wharton faculty webpage here:

About Our Panelist: Dushyant Pandit

Dushyant Pandit is Founder and Managing Director of Dorchester Advisors, a private wealth management company providing comprehensive investment advisory services to high net worth and institutional clients. Dushyant's expertise is developing investment strategy for clients with substantial portfolios. He uses proprietary techniques to develop innovative solutions for investing portfolios of successful professionals and wealthy individuals. These offer an alternative to the high-cost, high-complexity solutions which are currently heavily marketed in the industry.

Dushyant founded Dorchester Advisors in 2010 after working for more than 30 years in the investment industry and in consulting. His professional experience, in progressively senior positions, includes roles at Tocqueville Asset Management (Managing Director), Merrill Lynch (Managing Director), KPMG (Director), Gruntal & Co. (SVP & CFO), PNC financial services group (SVP), and the Hay group.

Dushyant has an MBA in Finance from the Wharton School and a B.Sc. in Statistics and Economics from Bombay University.

About Our Panelist: Kevin G. Carter

Kevin G. Carter CFP ® is Managing Director at the Fiduciary Trust International. Kevin is a Senior Portfolio Manager with over 26 years of investment management experience. He is a member of the firm's Equity Strategy Committee and brings a breadth of expertise across portfolio management and wealth planning strategies. Before joining Fiduciary Trust, he was a portfolio manager at PNC Wealth Management for seven years, UBS Private Bank for ten years, Morgan Stanley Private Bank for two years, and JP Morgan's Private Bank for seven years. He earned a Bachelor of Science degree in finance at Saint John's University and a Master of Business Administration degree with specializations in finance and taxation from Fordham University. He is a Certified Financial Planner (CFP®) and a member of the Financial Planning Association.

Kevin lives in Robbinsville, NJ with his wife and two young daughters. In his free time he loves to play tennis and volleyball.

About Our Moderator: David S. Bigelow

David S. Bigelow is Managing Director and Wealth Director at the Fiduciary Trust International. David is responsible for building investment and trust relationships with individuals, families, and foundations in the Greater New York region. He has over 25 years of experience in financial services. Before joining Fiduciary Trust, David worked at JP Morgan Private Bank as a senior banker. While there, he orchestrated the resources of their private bank to advise his clients on the full spectrum of their wealth management needs, primarily investment management, trust and estate planning, borrowing, and philanthropy. Prior to that, he served at NewOak Capital as managing director and senior marketing advisor where he was responsible for real estate portfolio analyses. He was an alternative investment product manager at Clinton Group and, previously, a managing director and department head at Radian Asset Assurance where he created insurance solutions for financial institutions. David was formally credit trained at First City Bancorporation of Texas and Standard & Poor's. He was also an investment banker at Prudential-Bache Securities, where he worked on equity raises and mergers for publicly traded companies. His analytical expertise also includes alternative investments, structured finance and insurance.

He received a BA in economics from Brown University and a MBA in finance from Wharton. David is originally from Vermont. His outside interests/passions include his four children, the Brooklyn and Manhattan tech ecosystems, contemporary art, rugby, Vermont and socially impactful philanthropies.

About Our Moderator: Karthik Sriram

Karthik Sriram, WG’19 works in the area of Strategy and Finance for Amicus Therapeutics, a biotechnology firm focused on helping patients with rare and ultra-rare diseases. His work involves Financial Modeling, Corporate Valuation and Operating Models & Strategy.

Karthik enjoys hiking, sports (playing and watching), and spending time with his family.