Avery is a Senior Wealth Director for BNY Mellon Wealth Management. In this role, she is responsible for new business development in the Southeast region, and works with individuals, families, and institutions to identify how BNY Mellon Wealth Management’s investment and wealth management capabilities can help them reach their overall financial goals.

Avery joined the firm in July 2014 and has more than 18 years of experience in the investment and financial services industry. Previously, she was Senior Vice President, Philanthropic Consultant and Senior Vice President, Business Banking with Wachovia, then with Wells Fargo. As a philanthropic consultant, Avery worked with families and successful nonprofit institutions to improve grant-making efficacy, foundation & endowment management, use of planned giving, and long term strategic planning. In Business Banking, Avery worked with C-level executives to create more efficient capitalization and cash flow via debt allocation, streamlining payables, payroll and analyzing working capital. Prior to getting her MBA, Avery was a stockbroker with Alex, Brown & Sons and a corporate finance associate with Wachovia.

She has recently been selected as a member of the 2015-2016 Philanthropic Advisors Leadership Institute class which is sponsored by The Community Foundation for Greater Atlanta. Avery is also proud to serve on the advisory board for Mercy Care Atlanta. Her past community involvement includes serving on the boards of South Arts and Georgia CASA and on committees for Southeastern Council of Foundations, SCAD Atlanta, and Capital Campaign Foundations for the Woodruff Arts Center.

Avery received a bachelor’s degree from Sewanee: The University of the South with a double major in Philosophy and Fine Arts. She later received her MBA in General Management with a concentration in Social Enterprise from The Fuqua School of Business at Duke University, where she received the Class of 1990 Scholarship and a Dean’s Recognition Award.
SMITH CAREER CONVERSATIONS

Smith Career Conversations at the University of the South are made possible by the Joel A. Smith Fund for Career Exploration, generously established by Joel A. Smith III, C’67.

The Smith Fund makes possible two key events and a number of paid internships each year. In the fall, Smith Career Conversations offer students exposure to careers in banking, finance, and consulting. Each spring, Smith Career Conversations offer information about a variety of career fields.

This semester’s Smith Career Conversations include seven Sewanee Alumni across a spectrum of careers in banking, finance, and consulting. The panel discussion will be moderated by Chip Manning, director of the Babson Center for Global Commerce, and will cover varied career trajectories, including how the panelists’ experiences at Sewanee have facilitated their success. Students also have the opportunity to share lunch, network, and participate in practice interviews with participants.

Kathy Touchstone, C’90
Senior Vice President, Pegasus Banking

Kathy joined Pegasus Banking 2013 as an SVP to head the credit administration for the bank. Pegasus is a $350MM, 8 year old, privately held bank in Dallas, TX. Since she joined Pegasus, the bank has grown, credit quality has improved and bank exams have been good. While Kathy also still manages some client relationships, she joined Pegasus to see and learn the operations of a bank from the ground up and to fully experience a community bank and early start-up environment.

Kathy started her career in banking from a Sewanee on-campus interview with First Union Bank of Charlotte, NC (now Wells Fargo). She completed their 9 month consumer banking training program and worked in both branch banking and operations in Savannah and Atlanta from 1990-1996. She finished her work with First Union as the project manager of the banks’ operations during the 1996 summer Olympic Games in Atlanta. During that time, she also completed her MBA at Emory University in Atlanta. She and her husband, Neill Touchstone C’89, then moved to his hometown in Dallas. She was with NationsBank (now Bank of America) Private Banking group from 1997 – 2000 and completed their credit training program as she started her career in private bank lending. She took 4 years off to stay at home with her children when they were small. She returned to the work place in 2004 in a part time role and has continued to grow her portfolio and skills with several regional banks, all in her local community, since that time. She has always maintained a specialty in credit and lending.

Kathy graduated Cum Laude with a B.A. in Economics from The University of the South, and an MBA from Emory University in Atlanta, GA. While at Sewanee, Kathy held several officer positions in Theta Pi sorority, earned a paid Internship with Price Waterhouse during the summer after her junior year and also received the Atlee Heber Hoff Award for Economics. She is active in her community, school and church.

Kathy has been married for 22 years to Neill and they have a daughter who is a junior in high school and a son who is a freshman.
Wende Stambaugh is a Learning Executive with more than twenty years of experience in the financial services industry. Since joining Bank of America in 1989, Wende has led global efforts to improve the employee experience, resulting in higher retention, engagement and professional development of others. In her current role, Wende helps over 30K managers across the globe develop themselves and others for higher performance and impact in an inclusive environment. She is currently leading a program that develops middle and frontline managers, with statistically proven impact around the employee engagement and intent to stay in the program’s first year.

In Wende’s 24 years at the bank, she has worked across Global Human Resources, Staffing, Learning and Leadership Development, including work with every major business across the bank. Her professional passion is building processes and solutions that drive the employee and customer experience, positively impacting engagement, career development and business results. In addition to her role in Learning and Leadership Development, Wende is also the Human Resources Market Lead for the Nashville Market.

Wende is a magna cum laude and Phi Beta Kappa graduate from The University of the South. She completed graduate level courses from SunTrust’s management training program for retail and commercial banking and is Green Belt certified in Six Sigma. Wende resides in Nashville, TN where she serves as the executive sponsor for LEAD for women and currently volunteers with Alzheimer’s patients and young children in her community. She enjoys spending time with her teenage daughter and competing in national/regional ballroom competitions.

Adams Conrad is a Consultant at Carlisle & Gallagher Consulting Group, an NTT Data Company, a management and technology consulting firm focused in the financial services space. He has been with the firm since 2013.

His previous projects have focused on M&A, technology integrations and implementations, and data and analytics. His current project is integrating the Wholesale division of a Top Five U.S. Bank to enable efficient credit analysis, collaborative sales, and streamlined regulatory reporting.

While at Sewanee, Adams majored in International Studies with a focus in Global Capitalism in Asia and the Middle East. He was a Canale Intern, an Arcadian and Senior Interviewer with the Office of Admissions, an Acolyte for All Saints’ Chapel, and the Secretary of the IFC.
Mary Catherine Horne, C’13
Graduate Recruiting Coordinator, Bank of America

Mary Catherine Horne graduated from Sewanee in 2013 with a B.A. in history and a minor in political science. At Sewanee, she was a Proctor, an Arcadian, a tennis player and a member of the Student Alumni Leadership Council. Following graduation, she completed a post-graduate certificate in international business practice with distinction at St. Mary’s University Twickenham in London, England while also working as an HR specialist for redundancy and employee relations at the Royal Bank of Scotland. Since September 2014, Mary Catherine has worked as the graduate recruiting coordinator for global human resources at the Bank of America in Charlotte, North Carolina, where she independently facilitates the campus recruiting process by providing technical and logistical support to several recruiters.

Catherine Lambert, C’12
Management Consultant, Accenture Consulting Platform

Catherine Lambert graduated from Sewanee in 2012 with a B.S. in Psychology as well as minors in Computer Science and French Literature. At Sewanee, she was a Proctor and a member of the golf team. Prior to graduation, she completed a business development internship with Document Access Systems and participated in the Sewanee-At-Yale Directed Research Program. Catherine was originally hired as a technology consultant into Accenture’s IT Service Excellence practice. She has recently transitioned into management consulting for Accenture’s Finance & Risk practice in Atlanta, GA. Her project clients have been primarily in the banking industry. She’s had the opportunity to work in a range of spaces including Anti-Money Laundering, Commercial Credit, Legacy Asset Serving, Financial Reporting & Analytics, as well as Budget & Forecast strategy. She is currently working on a project related to data management and operational design.

Patrick Lynch, C’ 05
Vice President of Strategic Accounts, Raymond James Financial

Patrick is Vice President of Strategic Accounts at Raymond James Financial. Reporting to the President of RJF, Patrick is responsible for developing a global relationship management function for a select group of identified strategic partner firms. In addition to Strategic Accounts oversight, Patrick supports the firm’s corporate development function by managing deal execution and diligence review for corporate acquisition opportunities.

Patrick initially joined Raymond James as Assistant to the Chairman, where he supported the Chairman, CEO, and other executives with strategic and operational initiatives. Previously Patrick worked at Mercer Capital, where he specialized in valuation in the broker-dealer, asset management, and insurance industries.

Patrick earned a B.A. in Economics from Sewanee: The University of the South and an MBA from Kellogg School of Management, and is also a CFA Charterholder. In his spare time Patrick enjoys tennis, college football, and competition BBQ.