WOMEN IN INVESTING NETWORK

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Investing in You: A Panel on Financial Self Care for Women

Moderator: **Fareeha N. Arshad, CFA, CFP®, CTFA**

Fareeha N. Arshad is a Portfolio Manager in Glenmede's Philadelphia office. In this role, she is responsible for providing investment advice, asset allocation and ongoing portfolio management for Glenmede clients. Ms. Arshad partners with advisory, tax and wealth planning colleagues to understand client goals, provide tailored guidance and ensure clients' wealth management objectives are fulfilled.

Prior to joining Glenmede, Ms. Arshad served as an Assistant Vice President and Investment Advisor at PNC Wealth Management, where she managed investment portfolios for individuals and trusts. She brings over two decades of experience to her work with Glenmede clients.

Ms. Arshad received a Master of Business Administration in finance from Drexel University as well as a Bachelor of Science in finance from The Pennsylvania State University. She has earned the Chartered Financial Analyst®, CERTIFIED FINANCIAL PLANNER™ and Certified Trust and Financial Advisor designations.
Ms. Arshad serves on the Board of the Philadelphia Estate Planning Council, where she is Chair of the DEI Committee and the Professional Women's Network. She also serves on the Board of the Homeless Assistance Fund and works with the group to monitor investments and to develop an impact investing program.

Panelist: **Jullian M. Golden**

Jillian M. Golden is a Wealth Advisor in Glenmede's Philadelphia office. In this role, she is responsible for providing thoughtful wealth management advice, solutions for fiduciary, charitable, financial, and wealth transfer planning, and trust and account administration. Ms. Golden partners with investment, tax and wealth planning colleagues to understand client goals, provide tailored guidance and ensure clients' wealth management objectives are fulfilled.

Ms. Golden has spent her career working directly with individuals and multi-generational families to formulate and execute their lifetime and legacy goals. Prior to joining Glenmede, Ms. Golden served as a Senior Trust Officer for Clarfeld | Citizens Private Wealth. In this role, she provided fiduciary services to high-net-worth and ultra-high-net-worth clients in the company's Mid-Atlantic and Mid-West regions. Previously, Ms. Golden served as a Fiduciary Market Manager for PNC Bank where she managed a team of fiduciary professionals in the Philadelphia market. Prior to her career in banking, Ms. Golden practiced law and focused a portion of her practice on trust, estate and fiduciary litigation matters.

Ms. Golden earned a Juris Doctor degree from Widener Law Commonwealth and a Bachelor of Arts degree in Communications from Villanova University. She is licensed to practice in Pennsylvania and the United States District Courts for the Middle and Eastern Districts of Pennsylvania.

Panelist: **Eileen R. Heisman**

Eileen Heisman is an accomplished global CEO, board member, and leader with over 20 years as CEO of National Philanthropic Trust (NPT), building it to be among the largest and fastest growing donor-advised fund providers in the world. Under her leadership, NPT raised over $63 billion in assets and granted $31B to 778,000 grants entities worldwide. She is recognized for her expertise in corporate strategy, risk management, cultural adaptation, fundraising and investment oversight. Eileen pioneered the global expansion of NPT in 2014, anticipating that the popularity of the product would extend beyond US.

Eileen’s board experience: NPT Board member for 14 years; Dean-appointed Governance Committee for UPenn NPL Master’s Program; Founding Board Member of Social Impact Commons, a national incubator for emerging entities and Founding Board Chair for its Philadelphia affiliate; Arcadia University trustee-serving on its Audit Committee in a primary role; served on two NPT-UK boards and chaired one for ten years; National Advisory Board for Carnegie Mellon's Dean of Dietrich College and past Advisory Board to Dean at University of Michigan's SSW.

As CEO, she built NPT into the premier “white glove” provider of DAFs, one of the top US grant makers and the third largest DAF sponsor by assets under management. She and her team served a multitude of high-profile donors and institutions, including JPMorgan, JPMorgan Chase, UBS, Wells Fargo, BMO and Merrill Lynch, the majority of which she personally cultivated.

As a qualified financial expert, she also launched innovative approaches to NPT's services, bringing to market several industry-standard programs, including the first national private-label DAF programs for large financial firms and distinctive concierge donor services. She launched the first annual industry report on donor-advised funds which continues to publish data from over 1,000 entities, and it is recognized as the definitive resource on DAF data.

Eileen has taught a graduate course on philanthropy at the University of Pennsylvania since 2006 and earlier in her career worked in politics, policy, and fundraising, working at the Philadelphia Foundation as a Public Affairs Director, as the Finance Director at Arlen Specter for the US Senate Campaign and as Councilwoman Joan Specter's Chief Legislative Assistant.

She is a sought-after speaker on topics including charitable and planned giving, global philanthropy, and anti-money laundering and has been frequently featured in prominent media outlets including CNN, Bloomberg, New York Times, and Wall Street Journal. Eileen holds an MSW from the University of Michigan and a BA in Psychology from Carnegie Mellon, where she received the Carnegie Mellon Distinguished Alumni Award in 2019. She completed executive education programs at Stanford University and Wharton.

She has been recognized with numerous awards including the 2024 DAF Giving Summit DAF Trailblazer Award and Nonprofit Times' Power and Influence Top 50 for 10 consecutive years. Eileen is also passionate about mentoring the next generation of emerging leaders, including many former students. She is a proud cousin of football coach John Heisman after whom the Heisman Memorial Trophy is named.

Panelist: **Erin McQuiggan**

Erin E. McQuiggan advises private clients on trusts and estates law, focusing on comprehensive estate planning, probate and taxation matters. Her practice includes estate, gift and generation-skipping transfer tax planning, pre-transaction tax planning, closely held business planning (limited liability companies, limited partnerships and business succession planning), charitable planning and multi-generational wealth transfer planning. Ms. McQuiggan also counsels individual and corporate executors, trustees and families with respect to complex estate and trust administration.

Ms. McQuiggan has broad experience in the preparation and funding of a wide variety of estate planning vehicles including wills, revocable trusts and irrevocable trusts, such as spousal lifetime access trusts, asset protection trusts, grantor retained annuity trusts, life insurance trusts and dynasty trusts. Ms. McQuiggan's clients include wealth creators and business owners who have built success in private and public companies, including life sciences, technology and manufacturing. Her practice focuses on sophisticated pre-transaction planning around gift, estate and income taxes, and includes the preparation of gift, estate and inheritance tax returns.

Ms. McQuiggan is well-versed in analyzing balance sheets, guiding the decision-making process and implementing holistic, thoughtful estate plans. She prides herself in distilling complex and confusing concepts into understandable language.

Prior to entering private practice, Ms. McQuiggan served as law clerk to the Honorable Joseph D. O'Keefe, Administrative Judge of the Philadelphia Court of Common Pleas, Orphans' Court Division.

Ms. McQuiggan is a graduate of Temple University Beasley School of Law (LL.M. 2022), The State University of New York at Buffalo Law School (J.D. 2007) and The Pennsylvania State University (B.A. 2004).

Areas of Practice

- Private Client Services
- Estate Planning
- Wealth Transfer Tax Planning
- Probate
- Estate & Trust Administration
- Family Offices, Banks and Trust Companies