

L. Michelle Morris

Morgan Stanley

12/2007 – Present

- (Sept. 2012 – present) Executive Director, Morgan Stanley Wealth Management Global Investment Manager Analysis Group. Responsible for conducting investment due diligence on alternative investment funds across multiple strategies, including private equity, venture capital, real estate and infrastructure for the Morgan Stanley Wealth Management platform. Worked closely with the Morgan Stanley Global Sustainable Finance group and conducted investment due diligence on behalf of the Morgan Stanley Investing with Impact platform.
- (2010 – Sept. 2012) Executive Director, Morgan Stanley Investment Management and Investment Team member of the Morgan Stanley Emerging Managers Fund. Responsible for sourcing emerging asset management firms and hedge funds and raising institutional capital for the Emerging Managers Fund from U.S. public and corporate pension funds, foundations and endowments.
- (2007 – 2010) Vice President, Morgan Stanley Investment Management, U.S. Institutional Advisory Group. Responsible for business development with public and corporate pension funds, endowments, foundations and financial institutions in the Mid Atlantic and Southeast regions and the NY/NJ/CT tri-state area across multiple investment strategies, including private equity, real estate, equities and fixed income.

Citigroup Inc.

1990 – 2007

Corporate Strategy and M&A (2003 – 2007)

- Director, Corporate Strategy and M&A group. Responsible for managing the M&A transaction execution process for various Citigroup business segments. Responsibilities included validating strategic fit, analyzing business model assumptions, valuation analysis, due diligence and contract negotiations. Worked closely with Corporate M&A Legal, Tax, Treasury, Accounting and business teams to develop optimal deal structures that maximized economic impact to Citigroup.

Office of the Vice Chairman and Chief Operating Officer (2002 – 2003)

- Chief of Staff to the Vice Chairman and Chief Operating Officer of Citigroup. Participated in all COO business review meetings in the U.S. and Europe and was responsible for managing special projects initiated by the COO.

Citi Markets and Banking

Private Equity Fundraising Group (1999 – 2002)

- Director, Private Equity Fund Group, Corporate and Investment Banking Division. Responsible for business development with public pension funds, corporations, endowments and financial institutions in the Southeast region of the U.S. Raised capital for U.S. and European leveraged buyout, venture capital, and distressed debt and real estate funds.

Private Client Division – Alternative Investment Group (1997 – 1999)

- Senior Vice President, Smith Barney Alternative Investment Group. Responsible for structuring fund of funds.

Smith Barney Capital Management (1995 – 1997)

- Director, Institutional Sales and Client Service. Responsible for business development with public pension plans.

Capital Markets – Vice President, Municipal Finance Division (1990 – 1994)

Other Work Experience

1983 – 1990

- Vice President, Morgan Stanley - Municipal Finance; Associate; Salomon Brothers - Municipal Finance; Corporate Relationship Manager – Chase Manhattan Bank.

Education

- Bachelor of Arts in Economics, University of Pennsylvania
- M.B.A., Harvard University Graduate School of Business Administration

Registrations/Affiliations

- FINRA registrations - Series 24, 7, 63
- Board member, Brightpoint Health