



13th Annual Massachusetts Investor Conference

THURSDAY, NOVEMBER 6TH, 2025 | Thomas M. Menino Convention and Exhibition Center • Boston, MA

Speaker Biographies

Sue Perez

Deputy Treasurer | Office of the State Treasurer

Sue Perez is a Deputy Treasurer for Debt Management in the Massachusetts State Treasurer's Office. Sue is responsible for all of the Commonwealth's short-term and long-term borrowing needs and for its \$34 billion debt portfolio consisting of issues within the General Obligation credit as well as various Special Obligation credits. Sue also serves as Executive Director of the Massachusetts Clean Water Trust ("MCWT"), a position she has held since 2012. Sue was an auditor at PricewaterhouseCoopers, during which time she received her CPA. She is a graduate of the Boston University School of Management, with a B.S. in Business Administration. She resides in Foxborough, Massachusetts and serves as a Board Commissioner for the Foxborough Housing Authority.

Jim MacDonald

First Deputy Treasurer | Office of the State Treasurer

Jim MacDonald is a fifty plus year career employee in the Office of the State Treasurer. In January 2015, Treasurer Deborah Goldberg appointed Jim to the statutory position of First Deputy Treasurer. Jim also serves as Chief Executive Officer at the Massachusetts School Building Authority. As First Deputy Treasurer, Jim works closely with other state agencies on matters of policy and operations. On top of his duties as First Deputy, Jim is responsible for overseeing various departments that fall under the umbrella of the State Treasurer. Jim works closely with the Deputy Treasurer for Debt Management, the Executive Director of the Massachusetts Clean Water Trust, Assistant Treasurer/ CFO, Assistant Treasurer for the Unclaimed Property Department. Jim is the designee of the State Treasurer on the Board of Bank Incorporation, Clean Water Trust and the MMDT Advisory Board. He also represents the Treasurer at the Massachusetts Collectors and Treasurers Association and is a member of the National Association of State Treasurers, and the National Association of State Auditors, Comptrollers and Treasurers. Jim, who lives in Dedham, Massachusetts, attended Boston State College and is married, with two sons, to Paula, a retired registered nurse. He is active in St. Susanna Church in Dedham. Jim is in his eleventh term as a member of the Dedham Select Board.

Secretary Jason Snyder

Commonwealth Chief Information Officer | Executive Office of Technology Services and Security

Jason Snyder is the Secretary of the Executive Office of Technology Services and Security. He was previously the Chief Technology Officer at Harvard University. He has more than 30 years of information technology experience in government, higher education and the private sector. He worked at Harvard for almost ten years, as a Program Director for Identity & Access Management, as Managing Director of Architecture and Engineering, and as Chief Technology Officer since 2015. He served as Chief Technology Officer of the Commonwealth of Massachusetts for the duration of Governor Patrick's tenure, and prior to that spent 13 years in the private sector at CSC Consulting Group. He's a graduate of Rensselaer Polytechnic Institute and lives in Reading.

Nathaniel Keenan

Department Director | Massachusetts Clean Water Trust

Nate Keenan is the Department Director of the Massachusetts Clean Water Trust where he has worked since 2011. During that time, he has worked to execute over \$4 billion in bond issuances, drafted the Trust's first Green Bond and Sustainability Bond disclosure language, and developed numerous new loan and grant programs for communities throughout the Commonwealth. Nate graduated with a bachelor's degree from Saint Michael's College and a master's degree from Suffolk University.

Matt Horan

Deputy Director, Finance/Treasurer | Massachusetts Water Resources Authority

Mr. Horan was appointed Deputy Director, Finance/Treasurer in October 2019, formerly serving as Treasurer of the Authority since January 2015. Mr. Horan also served as Deputy Treasurer of the Authority (2008 to 2015) and as the Authority's Project Manager, Debt and Finance (2003 to 2008). Mr. Horan also has held several positions within the Authority's Operations Division. Mr. Horan holds a Bachelor of Science degree and a Master of Science degree from Boston College.

Undersecretary Katherine Antos

Decarbonization & Resilience | Executive Office of Energy and Environmental Affairs

Katherine Antos is the Undersecretary for Decarbonization and Resilience at Massachusetts Executive Office of Energy and Environmental Affairs. She leads efforts to achieve Net Zero greenhouse gas emissions by 2050 and equip people, environment and infrastructure to adapt to climate change. Undersecretary Antos previously served as the Deputy Executive Director for Planning & Sustainability at the Metropolitan Area Planning Council (MAPC), where she oversaw planning and initiatives to advance a more resilient Greater Boston region. She received regional and national awards for her previous roles as Senior Policy Advisor and Branch Chief at Washington, DC's Department of Energy and Environment and at the U.S. Environmental Protection Agency's Chesapeake Bay Program Office.

Secretary Matthew Gorzkowicz

Executive Office for Administration and Finance

Matthew Gorzkowicz is the Secretary of the Executive Office for Administration and Finance. He has more than 25 years' experience in state finance and budgeting in the Commonwealth. He has served as the Associate Vice President for Administration and Finance at the University of Massachusetts President's Office for more than a decade, where he had a direct role in setting the University's long-range administrative and financial goals and managed the development of an annual operating budget of \$3.8 billion. Prior to UMass, Secretary Gorzkowicz worked in the Massachusetts Senate, the Department of Mental Health, the School Building Authority, and the Executive Office for Administration and Finance under Governor Deval Patrick, where he served as Assistant Secretary for Budget and then Undersecretary. He is a graduate of Northeastern University and lives in Winthrop, MA with his wife and two children.



13th Annual Massachusetts Investor Conference

THURSDAY, NOVEMBER 6TH, 2025 | Thomas M. Menino Convention and Exhibition Center • Boston, MA

Speaker Biographies

Doug Howgate

President | Massachusetts Taxpayers Foundation

Doug Howgate is President at the Massachusetts Taxpayers Foundation. Doug began as President in January of 2023, after two years as the Foundation's Executive Vice President. This is Doug's second stint at MTF, having served as Research Director between 2015 and 2018. Prior to his time at the Foundation, Doug has held a number of prominent policy positions in Massachusetts. He served as Senior Policy Advisor to Senate President Karen Spilka between 2018 and 2020, and Budget Director at the Senate Committee on Ways and Means between 2010 and 2014. He has also served as Deputy Chief of Staff at the Massachusetts Port Authority and as a Senior Researcher at the Massachusetts Budget & Policy Center. Doug has a B.A. in Political Science from Holy Cross and holds a Master's degree from Georgetown's McCourt School of Public Policy.

Barbara Kroncke

Executive Director | University of Massachusetts Building Authority

Ms. Kroncke is the Executive Director of the University of Massachusetts Building Authority. She oversees the financing for and the acquisition and construction of facilities and infrastructure on all five of the University of Massachusetts campuses. This includes managing debt of approximately \$3.2 billion and evaluating and implementing project delivery options for the University. The Building Authority is currently managing or evaluating projects in excess of \$2 billion, each designed to enhance teaching, learning and student life at the Amherst, Boston, Dartmouth, Lowell, and Worcester campuses of the University. Ms. Kroncke, together with the Building Authority Board, works with the University President, Martin T. Meehan, the Board of Trustees, and the campuses to deliver cost-effective, sustainable and high-quality construction of world class buildings to support the mission of the University. Prior to joining the Building Authority, Ms. Kroncke was the Managing Partner of the Boston office of McCarter & English and Chair of the Public Finance Practice Group.

Chris Marino

Assistant Secretary for Budget | Executive Office for Administration and Finance

Chris Marino serves as Assistant Secretary for Budget at the Executive Office for Administration and Finance, a position that he has held since September 2023. In this role, he oversees the development of the Governor's annual budget recommendation, as well as the management of the Commonwealth's finances over the course of the fiscal year. Prior to his time with the Healey-Driscoll Administration, Chris spent nine years with the Massachusetts Senate Committee on Ways and Means, including six years as the Committee's Budget Director. He is a proud graduate of Boston College from which he earned a degree in Political Science in 2014. Chris resides with his family in Dedham.

State Treasurer Deborah B. Goldberg

Commonwealth of Massachusetts

Deborah B. Goldberg is the Massachusetts State Treasurer and Receiver General. In that role she is responsible for the state's cash and debt management, unclaimed property, and chairs state boards and commissions, including the Massachusetts School Building Authority, the Pension Reserves Investment Management Board, the State Board of Retirement, Massachusetts State Lottery Commission, and the Massachusetts Clean Water Trust. In 2015, she established the new Office of Economic Empowerment, the first of its kind in the country, and chairs its Economic Empowerment Trust Fund. Treasurer Goldberg also was elected to serve as President of the National Association of State Treasurers. As a former businesswoman and local elected leader, Treasurer Goldberg brings innovative leadership, disciplined fiscal management and an unwavering commitment to uphold economic stability and create opportunity for every Massachusetts resident. Treasurer Goldberg served for six years on the Brookline Board of Selectmen, including two as its Chair. Prior to her career in public service, she worked in retail operations, buying, and consumer affairs at The Stop & Shop Companies, Inc. Treasurer Goldberg is the President Emeritus of Adoptions with Love and serves on the Advisory Board of the Greater Boston Food Bank. She was one of the founders of Berkshire Hills Music Academy, a school for individuals with intellectual disabilities, is a trustee emeritus at Beth Israel Lahey Health, and a Director at Affiliated Physicians Group / Beth Israel Deaconess HealthCare. Treasurer Goldberg has been actively involved with numerous philanthropic activities, including The Grow Clinic, the 100 Club, Planned Parenthood League of Massachusetts, and the Combined Jewish Philanthropies. A graduate of Boston University, Boston College Law School and Harvard Business School, Treasurer Goldberg lives in Brookline with her husband Michael Winter and their son, Evan, and daughter, Meredith.

State Governor Maura Healey

Commonwealth of Massachusetts

Maura Healey is the 73rd Governor of Massachusetts. In 2022, she became the state's first woman and first openly LGBTQ person elected to the position. In her first year as Governor, Healey has already delivered on key promises to help Massachusetts become a leader in clean energy, a more affordable and equitable place to live, and a great place for businesses to operate. On her first day in office, Governor Healey appointed the nation's first cabinet-level Climate Chief and created the Office of Climate Innovation & Resilience to coordinate policies across all of state government to address the climate crisis. Governor Healey has also prioritized education and workforce development by making free school meals for K-12 students permanent and cost-free community college for Massachusetts residents and career apprenticeships accessible to more students and workers. Governor Healey also delivered on her promise to make Massachusetts more affordable by cutting taxes for the first time in 20 years, including creating the most generous Child and Family Tax Credit in the county. Her tax cuts package puts money back into the pockets of families, renters, seniors, and others who are struggling to keep up with the rising cost of living. She filed and signed the \$5 billion Affordable Homes Act, the state's largest ever housing investment, to create tens of thousands of homes and lower costs; and the \$4 billion Mass Leads Act, to invest in Massachusetts businesses, create good jobs, and keep the state's innovation economy the best in the world. Healey previously served two terms as Massachusetts Attorney General, first elected in 2014 and re-elected in 2018. In her role as the People's Lawyer, she took on difficult issues impacting Massachusetts residents, including the opioid epidemic, the climate crisis, escalating health care costs, and student loan debt. Earlier in her career, Healey was a litigation partner at an international law firm. Healey grew up the oldest of five siblings in an old New England farmhouse. She and her siblings were raised by their mother, Tracy, who worked as a nurse at the local elementary school. Her stepfather, Edward, who later joined the family, was a teacher and local union president. He coached her high school basketball team and instilled a lifelong love of the sport. Healey attended Harvard College, where she captained the basketball team, and then spent two years as a 5'4" starting point guard on a professional basketball team in Austria. For much of her career, she's been the only woman in the room and has taken every opportunity to elevate other women. She is a passionate advocate for LGBTQ rights, women's health, and women's equality in general, especially in sports. Governor Healey lives in Arlington, Massachusetts with her partner, Joanna Lydgate.



13th Annual Massachusetts Investor Conference

THURSDAY, NOVEMBER 6TH, 2025 | Thomas M. Menino Convention and Exhibition Center • Boston, MA

Speaker Biographies

Adam Baacke

Commissioner | Division of Capital Asset Management and Maintenance

Governor Healey appointed Adam Baacke to serve as Commissioner of the Division of Capital Asset Management and Maintenance (DCAMM) in August 2023. He brings more than twenty-five years of experience with planning, design, capital project management, real estate, community development, and public administration, most recently serving as Assistant Vice Chancellor for Campus Development at the University of Massachusetts Lowell. During his nearly ten-year tenure at UMass Lowell, he led the team responsible for all aspects of campus planning, real estate, and capital project delivery during a period of dramatic physical campus expansion, increased enrollment, and research growth as the institution emerged as one of New England's leading comprehensive public research universities. Before joining the UMass Lowell administration, Baacke spent fourteen years at the City of Lowell, including serving as Assistant City Manager and Director of Planning and Development. He championed award-winning initiatives in master planning, land-use regulation, development review, urban revitalization, and cultural development, many of which became statewide models for Gateway City renewal. Early in his career, he worked as a designer of museum exhibits, theater scenery, and special events and as a historic preservation planner. He has also taught courses in the Honors College at UMass Lowell and at Harvard University's Graduate School of Design. His civic engagement activities include service on the boards of directors and building committees for numerous non-profit and community organizations in the arts, education, food justice, economic development, and child welfare. He currently chairs the City of Lowell's Community Preservation Committee and serves as a trustee of the Merrimack Repertory Theatre. He earned a bachelor's degree from Cornell University and a master's from UMass Boston's McCormack Institute.

Abi Vladeck

Acting Deputy Commissioner, Office of Real Estate Management | Division of Capital Asset Management and Maintenance

Abi is the Acting Deputy Commissioner of Real Estate, overseeing DCAMM's leasing, transaction management, interior planning, and public-private development teams. She has an extensive background in public sector asset management and has been a trusted advisor to elected and appointed officials on questions of economic development, real estate development, public finance, and how best to leverage private investment for public good. Abi started with DCAMM in 2018 as a Senior Project Manager, leading complex redevelopment projects on state-owned sites. Prior to DCAMM she was the Program Director for Real Estate Assets in Governor Charlie Baker's office, where she oversaw the Open for Business program to make better use of state-owned property. Earlier experience includes several years at Boston City Hall, first as a Boston Urban Mechanics Program Fellow under Mayor Tom Menino, then as a Special Assistant in capital planning in the Office of Budget Management, where she helped shape the City's five-year, \$1.8 billion capital plan. Abi has also worked in the non-profit world on civic engagement and advocacy campaigns. Abi holds a Master's degree in Urban and Environmental Policy and Planning from Tufts University, and a Bachelor's in Literature from Yale.

Sean Foley

Director of Facilities Resources | Division of Capital Asset Management and Maintenance

Sean Foley has more than 25 years of experience in public construction, maintenance, project management and procurement. In his current position, Sean is responsible for DCAMM's deferred maintenance program which invests approximately \$100 million per year in Commonwealth facilities through multiyear spending plans. Prior to joining DCAMM, Sean worked as the Operations Manager for the Department of Correction. In this role, Sean helped the agency develop long-term capital plans including capital and operating budgets. Additionally, Sean managed the Department's deferred maintenance program. Sean holds a Steam Engineering license and is MCPPO trained.

Timur Yontar

Capital Budget Director | Executive Office for Administration and Finance

Timur Kaya Yontar is Capital Budget Director of the Executive Office for Administration and Finance, serving the Commonwealth in this role for nearly 5 years. He is also active in municipal public service in Arlington, with 8 years on the Capital Planning Committee (4 years as Chair) and 7 years as Town Meeting Member. Prior to A&F, Dr. Yontar had two decades' private sector experience as an investment consultant to universities, foundations, and pensions; a management consultant specializing in mergers & acquisitions; and an analytics manager for an internet startup. Dr. Yontar began his career in academia as Head Teaching Fellow and Assistant Head Tutor for Harvard's Government department. He holds bachelor's, master's, and doctoral degrees in political science from Harvard; serves as treasurer of a performing arts endowment; and has lived nearly 25 years in Arlington with his wife and two daughters.

Dr. Michael Goodman

Professor of Public Policy | University of Massachusetts Dartmouth

Michael D. Goodman, PhD, is Professor of Public Policy at the University of Massachusetts Dartmouth. An economic sociologist and policy analyst, his research focuses on economic development, regional competitiveness, and public policy in Massachusetts and New England. Professor Goodman is widely recognized as a trusted source of independent analysis for policymakers, the media, and civic leaders. He has served as principal investigator on more than \$14 million in external grants and contracts and has authored or co-authored over sixty professional publications on regional economic development, housing policy, demographics, and other applied social science topics. From 2020 to 2025, Dr. Goodman served in senior leadership roles at UMass Dartmouth, including Acting Provost, Senior Advisor to the Chancellor, and Executive Director of Economic Development and Community Partnerships. In these roles he oversaw academic operations, led major strategic initiatives, and advanced the university's Blue Economy partnerships linking research, industry, and government. Earlier in his career, Professor Goodman served as UMass Dartmouth's Faculty Senate President, Chair of the Department of Public Policy, and Executive Director of the Public Policy Center. Prior to joining UMass Dartmouth, he served for eight years as the Director of Economic & Public Policy Research at the UMass Donahue Institute. Since 2001, he has served as an Editor of *MassBenchmarks*, the journal of the Massachusetts economy published by the UMass Donahue Institute in cooperation with the Federal Reserve Bank of Boston.



13th Annual Massachusetts Investor Conference

THURSDAY, NOVEMBER 6TH, 2025 | Thomas M. Menino Convention and Exhibition Center • Boston, MA

Speaker Biographies

Navjeet Bal

President and CEO | MassDevelopment

Navjeet Bal is the President and CEO of the Massachusetts Development Finance Agency (MassDevelopment), where she leads the Agency in its mission to “stimulate business, drive economic growth and help communities thrive across Massachusetts.” MassDevelopment works with businesses, nonprofits, banks, and communities to deliver a wide variety of programs and services, such as loans, tax-exempt bonds, grants, real estate technical assistance, and more. Navjeet brings a private, public and non-profit sector background to this role, and has always worked at the intersection of these sectors. She spent 21+ years in private practice as a public finance lawyer, working at Mintz and Nixon Peabody. Navjeet spent four years in public service as the Commissioner of Revenue in Governor Deval Patrick’s administration from 2007-2011, leading the agency through the onset and duration of the Great Recession. Prior to joining MassDevelopment, she spent 9+ years as General Counsel and Chief Compliance Officer at Social Finance, Inc., a national impact-investing non-profit. Her varied professional background serves her well at MassDevelopment as she understands the needs and priorities of these different sectors. She has been at the forefront of innovative financing techniques including serving as Bond Counsel for the first issue of Green Bonds in the municipal debt markets; being one of the first lawyers in the country to work on “social impact bonds” and pay-for-success financings, and structuring elegant financial solutions to fund important public purposes through bond financings for the Massachusetts Clean Water Trust and Massachusetts School Building Authority, amongst others. Throughout her career, Navjeet has served on numerous non-profit and professional boards, including the Boston Bar Association, the Boston Public Market and the Boston Public Library. In her spare time, Navjeet enjoys reading, cooking and watching sports of all kinds, but especially football and soccer.

Juan Vega

Assistant Secretary for Communities & Programs | Executive Office of Economic Development

Since 2015, Juan Vega has served as the Assistant Secretary for Communities and Programs at the Executive Office of Economic Development. In this role, Juan administers a portfolio of state capital and operating grant programs and is responsible for the management and annual distribution of over \$200 million in state funding to municipalities and community organizations throughout the Commonwealth. Juan provides general policy support within the Secretariat on various community economic development matters and diversity initiatives. Juan was a co-lead in the development and currently oversees the operations of EOED’s Community One Stop for Growth initiative, which streamlines state grantmaking across multiple agencies. A lifelong Chelsea resident, Juan has been active in community and civic engagement initiatives for over 35 years. He served as an elected member of the Chelsea City Council from 1994 to 2001 and was selected by his peers to serve as Council President in 1999. Juan is a recipient of a 2009 Barr Foundation Fellowship for outstanding community service in Greater Boston. He currently volunteers as Chair of the Chelsea Housing Authority Board of Commissioners. Prior to joining the state, Juan served for seventeen years as President and CEO of Centro Latino, Inc., a multiservice nonprofit organization operating in Chelsea and Cambridge. Other experience includes working as a community organizer, coordinator in a state tax policy organization, and manager of several community economic development projects.

Naomi Berlin

Assistant Secretary for Business Growth | Executive Office of Economic Development

Naomi serves as the Assistant Secretary for Business Growth with the Commonwealth of Massachusetts’s Executive Office of Economic Development. There, she is focused on ensuring businesses will come, stay, and thrive in the Commonwealth. Prior to her role in the executive branch, Naomi ran the sales arm for the Cambridge Innovation Center’s growing global portfolio of innovation campuses, where she focused on fostering the best possible environment for innovators to succeed. Naomi holds a BA from Tufts University in International Relations, and an MPA from NYU’s Wagner School for Public Service. She is a mom of two and resides in Roslindale, MA.

Bran Shim

Senior Advisor | Executive Office for Administration and Finance

Bran Shim serves as Senior Advisor to the Massachusetts Secretary of Administration and Finance (A&F). He assists the Secretary in driving strategic and sustainable investments in housing and economic development across the Commonwealth. Bran brings over a decade of experience in public finance and budgeting. He currently sits on the boards of MassHousing, Massachusetts Housing Partnership, MassDevelopment, Massachusetts Technology Collaborative, Massachusetts Life Sciences Center, and MassVentures. He previously served as Assistant Secretary and Budget Director, working with the A&F team and over 150 state agencies to formulate and implement the Commonwealth’s \$50+ billion operating budget through COVID-19 response and recovery. Bran volunteers as a Human Services Commissioner and participatory budgeting delegate for the City of Cambridge, where he resides. He is a research affiliate of the Greater Boston Applied Field Lab at the Harvard Kennedy School. He has also been elected by his peers to serve as Eastern Regional Director for the National Association of State Budget Officers, sharing best practices across the states and territories. Bran has received the Governor Paul Cellucci Award for Leadership & Mentoring in State Government, the Governor Robert F. Bradford Fellowship for Excellence in Public Administration, and the John F. Kennedy Fellowship for exceptional academic ability and professional distinction. Bran is a CFA® charterholder and holds an MPA from the Harvard Kennedy School, an A.B. in statistics from Harvard College, and a diploma from the Julliard School Pre-College Division, where he studied double bass performance.

Mark Cabana

Managing Director, Head of US Rates Strategy | BofA Securities Global Research

Mark Cabana, Managing Director, is the Head of US Rates Strategy at BofA Securities Global Research, based in New York. In this role, he publishes research and trade recommendations covering US short-term interest rates and macro strategy. He also meets regularly with a broad range of clients to discuss the firm’s views on Fed policy, interest rates, and financial regulation. Before joining the firm in 2015, Cabana worked as an officer in the Markets Group at the Federal Reserve Bank of New York. He spent nearly 9 years on the Open Markets Trading Desk, which spanned the duration of the financial crisis. While at the NY Fed, Cabana was closely involved with the design and implementation of a number of asset purchase / QE programs and also managed a team focused on analyzing global macroeconomic conditions and financial markets. Cabana earned a bachelor’s degree from Furman University and a master’s degree from Johns Hopkins University in finance and international relations. He is a CFA charterholder.