



Ann Limberg
Head of Philanthropic Solutions and the Family Office
U.S. Trust, Bank of America Private Wealth Management

ANN LIMBERG is Head of Philanthropic Solutions and the Family Office. In her role, Ann oversees strategy, clients, advisory and consulting services for non-profit institutions, corporate and private foundations, and UHNW families.

Ann leads a national team of 200+ professionals and specialists, who deliver a wide spectrum of capabilities including board governance and development, outsourced chief investment office, grant making, high impact philanthropy and fiduciary administration.

Limberg has worked at Bank of America and its predecessor firms for 26 years, where she has held numerous leadership positions, most recently serving as Northeast Division Executive for U.S. Trust and President for Bank of America New Jersey.

Passionate about purpose and philanthropy, Limberg brings a lifetime of active engagement in non-profit boards and professional organizations, where she has been recognized numerous times for her impact and achievement.

She is a recipient of the United Way's Women in Philanthropy Award and The American Conference on Diversity's Humanitarian Award. She has been recognized as a Wall Street 50 Honoree, and one of New Jersey's Most Influential Women and Most Powerful Nonprofit Board Members.

Ann currently serves on the board of trustees of The Valley Hospital, Macaulay Honors College Foundation for the City University of New York, and Bergen County's United Way.



Andrew D. Plepler
Global Corporate Social Responsibility Executive

ANDREW D. PLEPLER is Bank of America's Global Corporate Social Responsibility Executive. In this role, Plepler engages with a broad range of consumer and community stakeholders to help inform and shape the bank's strategies, policies, practices and programs.

Plepler is chair of the bank's National Community Advisory Council, which brings together public and private sector leaders to provide external perspective and advise the bank on products, services and responsible business practices. He also works to connect with partners to ensure that the bank's collaborations on programs such as community development lending and investing, environmental sustainability, philanthropy, military support, arts and culture, and employee volunteer programs are making financial lives better in communities around the world.

Prior to joining Bank of America, Plepler served as senior vice president of Housing and Community Initiatives with the Fannie Mae Foundation. He oversaw three of the foundation's primary grant-making departments, as well as its regional offices in Atlanta, Chicago, Dallas, Pasadena and Philadelphia.

Before joining the Fannie Mae Foundation, Plepler was a trial attorney for the U.S. Department of Justice in the Tax Division and served on Capitol Hill as counsel to the U.S. Senate Committee on the Judiciary. Plepler earned a Bachelor of Arts degree in government from Franklin & Marshall College in Lancaster, PA, and a Juris Doctorate from the University of Miami School of Law in Coral Gables, FL.

Plepler founded and continues to serve on the board of the Washington, DC-based Urban Alliance Foundation, a nonprofit jobs and mentoring program that works with economically disadvantaged high school students. He also serves on the Boards of Local Initiatives Support Corporation (LISC), Living Cities Inc. and Levine Museum of the New South. Plepler has three children and resides in Charlotte, NC.



SARBJIT NAHAL

Head of Thematic Investment Strategy

Sarbjit Nahal is a Managing Director and heads the Thematic Investing Strategy team at BofA Merrill Lynch Global Research, based in London.

His global strategy team works to implement the enterprise-wide “A Transforming World” framework (earth, government, innovation, markets, people). This includes addressing thematic issues both from opportunity and risk perspectives – including education, energy efficiency, extreme weather and climate change, longevity, obesity and health & wellness, safety & security, waste, and water – as well as via screening tools such as the Global Megatrend Primer Picks, Stylish Themes, CO2 Screener, geographic risk, and ESG & Thematic Consensus models.

Sarbjit also sits on Merrill Lynch Global Wealth & Investment Management’s (GWIM) Environment, Social and Governance (ESG) Core Council, and the Diversity & Inclusion Council for EMEA.

The team has been consistently well ranked, and Sarbjit has been the #1 ranked SRI Analyst in the Extel survey for the last six years.

Prior to joining BofA Merrill Lynch in 2010, he was Head of Thematic Investing at Société Générale and Crédit-Mutuel-CIC, and held positions at Vigeo, the International Council on Human Rights Policy, and Pensions Investment Research Consultants.

He holds a Masters in Law (UCL), JD/Bachelor of Laws (Osgoode Hall) and Bachelors in History (Toronto).