



Joan Elizabeth Steel

312-852-5412 jesteel@alphaadvisorllc.com www.alphaadvisorllc.com

Joan Steel has accumulated substantial finance, risk management, global branding and investment expertise with public and private companies in a multi-dimensional career that spans more than 30 years. She is a highly sought-after financial consultant for her sound business judgment, deep technical knowledge, strategic acumen and collaborative problem-solving skills. Additionally, Ms. Steel has a strong track record of private company board and nonprofit leadership, with significant experience serving on audit, risk management, governance and investment committees.

Expertise

- Finance
- Capital Markets
- Investor Relations
- Global Branding
- Audit, Risk Management, Finance, Investment and Governance Committees

Since 2012, she has served as a non-executive director of the Hershey Trust Company and a member of its Audit and Investment Committees. This is a \$12 billion private company with a complex governance structure that has a controlling interest in the Hershey Company (NYSE: HSY) and Hershey Entertainment & Resorts Company. Its mission is to fund in perpetuity the Milton Hershey School, a residential school serving 2,000 at-risk K-12 children. As a dual director serving on the school's board, her finance and investor relations experience contribute to the sound management of Trust assets.

Ms. Steel founded a financial consulting firm, Alpha Wealth Advisors, in 2009 in response to ultra-high-net-worth clients seeking objective investment advice in the aftermath of the 2007-08 financial crisis. The firm provides independent investment consulting and customized financial solutions for CEOs, family offices and private foundations. Her expertise includes asset allocation, portfolio construction, risk reduction and integrated wealth preservation strategies, and creative problem solving.

Prior to 2009, Ms. Steel was a senior vice president in Private Client Services at The Capital Group, a global asset manager. There, she originated and managed ultra-high-net-worth client relationships. Her knowledge of investing in the emerging markets made her a popular speaker at investor conferences.

Earlier in her career, Ms. Steel was on the senior executive team that transformed Aon (NYSE: AON) from a U.S.-based insurance underwriter to a leading global commercial brokerage and human resources consulting company. She founded and led the financial relations practice (investor and media relations). She also launched and managed Aon's global branding (the first in its history) and integrated marketing strategies for all operating units worldwide. She was Aon's spokesperson to Wall Street and the media worldwide.

Before Aon, Ms. Steel was a senior executive with operating responsibilities at her family's privately held water treatment, chemical manufacturing and distribution business. She began her career on Wall Street as an institutional fixed-income broker for Salomon Brothers. She moved on to co-found and head E.F. Hutton's global money market group at the Chicago Board of Trade.

Ms. Steel is a trustee of Loyola University Chicago and chairs the Investment Policy Committee with oversight for the Endowment, Operating Funds and Charitable Trust portfolios. She is also a trustee of Rush University Medical Center, co-chair of the Arthritis and Orthopedic Leadership Committee and member of the asset-liability committee and director and treasurer of the Cuneo Foundation.

She holds an MBA from the University of Chicago and a BS from Georgetown University, and has completed director education programs at Harvard Business School and Stanford Law School's Directors College.