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2010 Nonprofit Awards for Excellence

Consultant of the Year Nominees

Lori Van Dusen, Convergent Wealth Advisors



Lori Van Dusen

Lori Van Dusen of Convergent Wealth Advisors, has excelled in guiding her 20 endowment and foundation clients, mostly smaller funds, through turbulent markets. She has especially stepped up her game this year, conducting reviews with multiple clients to ensure asset allocations and other strategies still worked in the fast-changing market.

Her active, hands-on approach is appreciated. **Arnold-Peter Weiss** serves on the investment committees of two nonprofits she advises – the **American Numismatic Society** and the **Rhode Island School of Design**. “She’s not passive,” he explained. “If there’s an issue in the market, she’ll call the investment committee to inform us about it. She’s very responsive, provides excellent assistance with asset allocation, and her due diligence is extensive,” said Weiss.

Ezra Cornell, chair of the **Boyce Thompson Institute’s** Board of Directors, has been a client of Van Dusen’s consulting services for 20 years. Van Dusen reviewed Boyce Thompson’s portfolio earlier this year, and not only looked at how the institute invests, but also thoroughly explained her own processes to the investment committee. “It was a very appropriate review, in that we know how she comes up with her ideas and we know how the asset classes in our portfolio are subject to stress,” said Cornell.

Van Dusen is also highly regarded by her peers, especially for her technical investment expertise. “She’s one of the finest consultants I’ve ever seen,” said **Frank Campanale**, former ceo of **Smith Barney Consulting**. “To use a basketball analogy, if I were running a team, she’d be my starting point guard,” added **Leo Pusateri**, president of **Pusateri Consulting and Training**.