

# PATRIOTIC MILLIONAIRES

WEALTH for the COMMON GOOD

**ORGANIZATIONAL OVERVIEW** 



If elected officials will listen only to those with power and money, then those of us with power and money must leverage our position to advance the common good.

#### **MORRIS PEARL**

Chair of The Patriotic Millionaires

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#### **PATRIOTIC MILLIONAIRES**

WEALTH FOR THE COMMON GOOD

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### THE CHOICE

Our nation has a choice to make. Will we be a country capable of nurturing and realizing the aspirations of all of our citizens, or will we slip further into government of, by, and for the few?

Wealthy citizens also have a choice to make. Will they sit back as the country stumbles or will they engage with their fellow citizens in the fight for an inclusive economy and a true democracy?

The Patriotic Millionaires organization provides a dynamic vehicle through which like-minded people can work together to advance the common good. Together we can realize a once-in-a-generation opportunity to reset America's ideological course and create a new American paradigm for the next chapter in our nation's history.

### **OUR VALUES**

- Equal political representation
- A livable minimum wage
- A fair tax system

Simple. Essential. Revolutionary.

Proud "traitors to their class," members of the Patriotic Millionaires are united in their concern about the destabilizing concentration of wealth and power in America.

The mission of The Patriotic Millionaires organization is to build a more stable, prosperous, and inclusive nation by promoting public policies based on the *First Principles* of equal political representation, a livable minimum wage, and a fair tax system.

#### **WE BELIEVE:**

- Every American deserves as much political power as millionaires;
- Every American who works full time should be able to afford their basic needs; and
- Millionaires and major corporations who have benefited most from our country's assets
   should pay a larger percentage of the tab for running the country.

The values championed by the Patriotic Millionaires enjoy broad support from Americans across the political spectrum, irrespective of geographic boundaries and regardless of economic circumstances. If realized, they could form the basis for a powerful, just, and prosperous new era in American life.

#### **OUR VISION**

Most Americans, regardless of political party, support equal political representation for all citizens, a livable wage for working people, and a fair tax system that includes greater investment from the wealthy. Most political power currently lies with people who do *not* support these fundamental values.

The task ahead is difficult but relatively straightforward. We must grow the political power of Americans who are committed to this framework and diminish the political power of those who are not.

The Patriotic Millionaires believe the trend of growing economic and political inequality is both bad for society and bad for business.

We believe the country will be more stable and more prosperous when all of our citizens are authentically engaged in the governance process, rather than ceding control to a small number of self-interested actors.

We believe business models that rely on human misery should be exorcised from our economy. We believe the government should mandate a livable wage for all working Americans, rather than relying on "the market," which has failed to realize that goal over 240 years of American history. We believe a national living wage law will ensure a stable level of aggregate demand that will fuel our economy more broadly, ushering in a new era of prosperity for all Americans.

We believe our nation's social and economic progress requires significant and constant public investment, and that the wealthy — who benefit the most from our country's assets and institutions — should naturally and gladly pay the greatest share of whatever taxes are needed to support that investment.

Equal political representation. A livable minimum wage. And a fair tax system. **Simple. Essential. Revolutionary.** 

PATRIOTIC MILLIONAIRES

# TOWARDS A NEW GOVERNING FRAMEWORK

In 2026, the United States will celebrate her 250<sup>th</sup> birthday. By that time, the Patriotic Millionaires seek to make the "first principles" of equal political representation, a guaranteed living wage for all working citizens, and a fair tax system the dominant governing framework in America.

We hope to facilitate a wholesale rejection of modern conservatism, exposing the dogma of "free enterprise, limited government, and traditional family values" for what it truly is: a thin veil concealing rapacious capitalism, social Darwinism, and a profound misunderstanding of — and disinterest in — the human condition.

For decades, wealthy elites — and the elected officials they control — have advanced their own self-interest with little or no regard for the negative consequences such policies have predictably wreaked on the vast majority of Americans. The result has been a destabilizing concentration of wealth and power not seen since the Gilded Age.

Simultaneously, right-wing extremists and cynical political operatives have fomented hate, fear, and divisions in our citizenry in a craven effort to control the country's political dynamic. In the process, they have unleashed the worst elements of human nature.

Besting this national cancer requires more than a laundry list of good ideas. It requires the adoption of a new framework for how we live and work, how we understand ourselves in relation to each other, and how we codify this relationship in our system of laws. We must understand the *interconnectedness* of economic and political inequality and commit to advancing a governing philosophy that addresses both simultaneously.

PRESIDENT
CARTER: THE
UNITED STATES
HAS BECOME
"AN OLIGARCHY
WITH UNLIMITED
POLITICAL
BRIBERY"

Despite our nation's being founded on the promise of political equality, Americans have routinely seen their basic right of self-governance threatened by elites and elected leaders. Rampant voter suppression, hyper-partisan gerrymandering, and the poisonous effect of money in politics have created a political power structure that is more oligarchy than democracy. More than 150 years after slavery was outlawed, the country still suffers from an economic system that keeps many people poor in order to maximize the profits of the very few. At this moment, nearly 40% of working Americans do not make enough to support themselves and their

families. This economic reality is both bad for society and bad for business. And regardless of lip service paid to "citizenship," wealthy Americans, corporate CEOs, and lobbyists routinely use their money and political power to amass greater profits and even greater political power, all while shirking their most basic responsibilities to their fellow citizens and the nation.

Make no mistake: the imbalance of political power and the economic insecurity it has created will destroy the republic if we let it. The Trump presidency may speed this demise, but the danger existed long before our current president took the oath of office. Unless steps are taken now to address the structural deficiencies of our current system, this threat will continue long past his administration.

Trump's success should be understood not as a political anomaly, but as the entirely predictable result of a multi-decade strategy orchestrated and executed by far-right funders beginning after the Goldwater defeat in 1964. While those funders might not have chosen or even wanted Trump specifically, these self-interested funders created a confluence of political and sociological dynamics that divided and destabilized the country, creating the perfect preconditions for



TJ Zlotnitsky speaking at a rally opposing the nomination of Andrew Puzder for Secretary of Labor

rising nationalism and the emergence of an authoritarian leader. The mechanics of the strategy – the organizations, the people, the money, and the intersection of the three – have been explored in detail by various journalists, most notably *The New Yorker's* Jane Mayer in her book *Dark Money*, which traces the roots of the American conservative movement.

At the heart of this movement is a group of billionaires with a shared worldview: a common understanding of how the world is "supposed" to look. While the right's lockstep consistency is overstated, the major funders of the movement generally adhere to a core set of principles they publicly articulate as "free enterprise, limited government, traditional American values, and a strong national defense." Of course, the true nature of this philosophy is far darker than these seemingly innocuous phrases, but this set of principles serves as a guide star for an interlocking network of institutions and individuals that, over decades, have changed the political fabric of the country.

Our most difficult issues — race, immigration, reproductive freedom, social equality, mass incarceration, and global climate change among others — can all be effectively dealt with if we first create a political economy capable of meeting the basic needs of all of our citizens.

Following the advice offered in Lewis Powell's now-famous strategy memo to the U.S. Chamber of Commerce, a small group of conservative funders committed to "long-range planning and implementation," to "a consistency of action over an indefinite period of years," and to a "scale of financing available only through joint effort." The funders created a home base in the U.S. Chamber of Commerce in 1971 and found willing partners

in Republican lawmakers and the religious right. They now control all three branches of the federal government, and most of the power in the states.

But all is not lost. In addition to laying the groundwork for the decline of a nation, these funders also did something else ... they provided a roadmap for their own defeat.

History proves that a group of people working together over the long term can change a nation. Now progressive funders and allies have the opportunity to work together, over the long term, to assert a new governing framework into the American experience. But first, we must commit to a shared vision — a set of core values — that will serve as the North Star for our journey.

The Patriotic Millionaires' goal is as audacious as our name. By the time the United States celebrates her 250th birthday in 2026, the Patriotic Millionaires aim to make the "first principles" of equal political representation, a guaranteed living wage for all working citizens, and a fair tax system the dominant governing framework in America.

We seek to facilitate a wholesale rejection of modern conservatism, exposing the dogma of "free enterprise, limited government, and traditional family values" for what it truly is: a thin veil concealing rapacious capitalism, social Darwinism, and a profound misunderstanding of — and disinterest in — the human condition.

We believe our most difficult issues — race, immigration, reproductive freedom, social equality, mass incarceration, and global climate change among others — can all be effectively dealt with *if* we first create a political economy capable of meeting the basic needs of all our citizens.

We are, in some ways, a subversive organization. In a political system that has become more of an oligarchy than a democracy, our power lies in being seen as members of the "elite" class arguing against our perceived self-interest. The truth, however, is that the values we support will make the country more stable and more prosperous for all its citizens, including rich ones. While 2016 saw a huge increase in citizen energy, our elected representatives have grown accustomed to tuning "the people" out. If they will listen only to those with power and money, those of us with power and money must leverage our position to advance the general welfare and to build a better country for future generations of Americans.

Our country faces an unstable president, a volatile political climate, and an almost wholesale capture of government by moneyed interests. At this pivotal moment, the Patriotic Millionaires are leveraging their unique position to promote a powerful new governing framework in the public debate.

The 2016 election sparked a profound awakening, creating a once-in-a-generation opportunity to fundamentally reset America's ideological course and its political economy. Voters are rejecting the wholesale capture of government that began more than 50 years ago, and they are demanding their elected officials focus on the fundamental issues of power and money that have always been at the heart of the Patriotic Millionaires' work.

We have articulated a governing framework that will enhance the lives of all Americans, and have begun to build the political power necessary to advance that vision. This is our moment to drive this framework into the public consciousness and to have it illuminate the work of like-minded activists and elected officials across the country.

We must seize this once in a lifetime opportunity to coalesce our energies into a relentless effort to realize a new American paradigm around the two things that matter most in our capitalistic democracy: Power and Money.

## **HIGHLIGHTS**

The Patriotic Millionaires first came together in 2010 to demand an end to the Bush tax cuts for millionaires, instantly sparking the public's attention. Since then, the group has generated hundreds of millions of dollars worth of media attention, appearing on outlets from the Daily Show with Jon Stewart to the PBS NewsHour; from the front page of the Boston Globe to The History Channel.

In addition to generating an extraordinary amount of media coverage for the core values we support, in the last two years we have also placed more than 60 op-eds in local and national outlets. Highlights include two *New York Times* op-eds, Alan Patricof's piece titled "Close My Loophole" on the carried interest loophole and Morris Pearl's on SEC disclosure.

State and local media coverage is essential to changing public opinion. Highlights include: Geoff Coventry in the St. Louis Post-Dispatch; Leo Hindery in Albany Times Union; Jonathan Ruga in Deseret News; Stephen Prince in the Tennessean; Frank Patitucci in the Mercury News; Dal LaMagna in The Scranton Times-Tribune; Art Lipson in The Salt Lake Tribune; Mary Stranahan in the Missoulian; and Severin Beliveau in the Kennebec Journal & Morning Sentinel.

The Patriotic Millionaires' work has also attracted significant international attention. The UK's Channel 4 News aired a feature about the group, with the online version alone garnering more than 600,000 views. NHK, the largest



public television station in Japan with a reach of 124 million, prominently featured the group in a special on global inequality. The President of the Czech Republic referenced the group in an address to the Czech parliament, and a leading Swedish magazine did a feature story on the organization.

In addition to driving the public narrative, the Patriotic Millionaires have met privately with hundreds of elected leaders from both parties. We have testified in front of lawmakers at the local, state, and federal levels on issues from minimum wage to campaign finance to tax policy. We had the honor of joining President Obama in the White House in 2012 for his Tax Day address and in 2014 for the signing of the Executive Order raising wages for federal contract employees.

We have spoken at a number of citizen rallies and marches including: the announcement of the \$15 minimum wage bill with Senators Schumer, Murray, and Warren; the nationwide Tax Day protest demanding President Trump's tax returns; rallies for campaign finance reform and tax fairness at a number of state houses; the Good Jobs Defenders rally against Secretary of Labor nominee Andrew Puzder with Senator Sanders and others; the rally at the US Capitol against the nomination of Jay Clayton for SEC Chair; and a protest of the McDonald's shareholder meeting among others.

The Patriotic Millionaires organization works in partnership with a number of critical grassroots institutions and activists including: Good Jobs Nation; Every Voice; Fight for \$15; Americans for Tax Fairness; the National Employment Law Project (NELP); Hedge Clippers; Jobs with Justice; Take Back Our Republic; the Urban League; Prosperity Now; Americans for Financial Reform; Working America; and many others.





Above: Leo Hindery, Jr., at a press conference with legislators to discuss closing the carried interest tax loophole

Left: Suzanne Nash and Art Lipson with Representative Levin, lead sponsor of the Carried Interest Fairness Act

Opposite: Patriotic Millionaires join President Obama on stage at the White House for his 2012 Tax Day address

## THE FRAMEWORK



Our first publication, *Renegotiating Power and Money in America*, provides the narrative framework from which our work flows. The volume outlines our core values and highlights some of the specific policies that can help bring those values to life. This publication serves as a primer to introduce our worldview, and it has been widely distributed to a variety of influential audiences. Additional planned volumes will expand on each of the three principles: equal political representation, a livable minimum wage, and a fair tax system.

They are not long, complex, impenetrable white papers, nor are they a mindless list of disconnected, non-persuasive talking points. Instead, they can be seen as storylines — narrative frameworks — that connect values to public policy in a conversational style.

The volumes help like-minded influencers and regular citizens learn how to talk about first principles in a holistic, understandable, and compelling way. We promote these volumes aggressively among lawmakers in the hope that they will follow the narrative we provide in the pages to shape the presentation of their own values. We provide additional communications guidance through our "How to Think Like a Patriotic Millionaire" one-sheets, issue decks, and other collateral.

## IN THE HALLS OF POWER

Regardless of party, legislators respond to the people they know and to power brokers in their communities. As influential members of their communities, members of the Patriotic Millionaires maintain relationships with their elected representatives and leverage these relationships for the common good.

Our legislative team works with members to maintain a regular presence in the halls of power, both at the federal level and in the states. We have met with hundreds of federal, state, and local legislators, focusing in each case on the core values at the heart of our governing philosophy.

Over time, we will build a national network of like-minded elected officials from every corner of the country, champions who reject the corporate influence that permeates government. These are people of integrity and purpose who already

share our values and will be the best people to carry our message and values to their colleagues and constituents.



Ellyn Gelson speaking with US Senator Cory Booker about raising wages

## **DAY TO DAY**

In our day to day work, we focus on amplifying our core values through the lens of specific policy issues in the current media cycle. We identify emblematic issues that most effectively illustrate our worldview, and we directly contrast our vision with that of conservatives.

By way of example, our media work defending ACA finds our Patriotic Millionaires rejecting their tax cut in favor of healthcare for 23 million Americans. Our public education campaign on the carried interest tax loophole challenges the wholesale capture of government by Wall Street and the egregious influence of money on our political system. Our estate tax work illuminates the idea that dynasties are incompatible with democracies and that heirs and heiresses deserve no special treatment in the tax code for income they had no role in generating. Our work on the \$15 minimum wage counters trickle-down economics and advances the idea of a demand-based economic system.

By amplifying the stark differences of perspective on narrow and easily understood policy issues, the Patriotic Millionaires are able to effectively define and magnify the fundamental difference between the progressive and conservative worldviews. In articulating the difference of perspective on these emblematic policy issues clearly and repeatedly, the Patriotic Millionaires lay the groundwork for a wholesale rejection of conservative tax, wage, and political process policies and create an opening for the adoption of rational policies that serve the American people as a whole.

Our blog and the associated social media amplification provide our members with opportunities to weigh in publicly on issues that are of particular interest to them. Our "Why I'm a Patriotic Millionaire" series offers insight into the hearts and minds of the members, and increases the personal connectedness to our broader efforts. We produce and promote policy videos on a variety of issues under our core framework; write and place op-eds each month in publications across the country; and host and appear on panels at public events and policy forums.



Leo Hindery, Jr., Morris Pearl, and Eric Schoenberg at a press conference about closing the carried interest tax loophole

All of these activities feed directly into our active and successful media booking operation, which places members of the group on television or in print most days of the week. This "earned media" model provides enormous leverage for every dollar spent. Rather than spending money on expensive ad buys and media consultants, we operate what is in essence a public relations capacity for a core set of shared values supported by a group of interesting, knowledgeable, and successful leaders. Our job is to connect the values of the Patriotic Millionaires to the daily news cycle.

The media power of the Patriotic Millionaires' brand is enormous. We have generated hundreds of millions of dollars' worth of media attention for a fraction of what the same coverage would have cost as a paid ad buy. The brand is so successful that we often generate media coverage of critical topics with just a press release or a statement from our members.





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PATRIOTIC # **MILLIONAIRES** 

# Roll Call

#### THE Huffington Post



## SALON











The New York Times







## The Boston Blobe



THE WALL STREET JOURNAL.

The San Diego **Union-Tribune** 









theguardian



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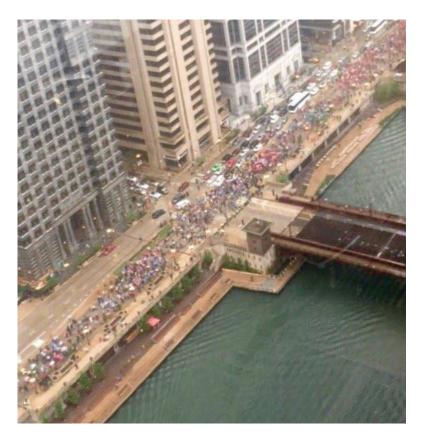
## STATE AND LOCAL ACTION

In addition to driving a national media narrative and pursuing federal legislative goals, the Patriotic Millionaires pursue the advancement of the "first principles" at the local and state level. Recent highlights include:



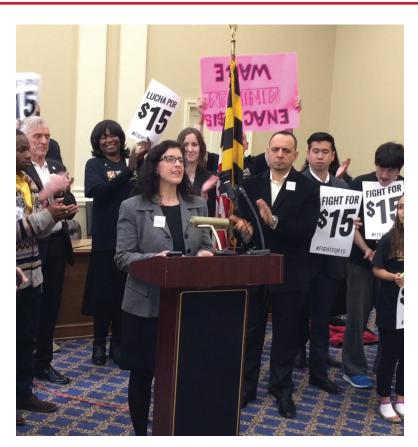
#### CONNECTICUT

Chair Morris Pearl testified in front of the Connecticut legislature alongside State Representatives Robyn Porter and James Abis, the Connecticut chapter of United Federation of Teachers, Hedge Clippers' Charles Kahn, and Strong Economy for All's Michael Kink, in support of closing the carried interest tax loophole at the state level.



#### **ILLINOIS**

Patriotic Millionaire TJ Zlotnitsky spoke at a protest of the McDonald's shareholder meeting in Chicago, IL attended by 10,000 people.



#### **MARYLAND**

Patriotic Millionaires Suzanne Nash, TJ Zlotnitsky, and Fred Rotondaro testified in support of legislation to raise the state's minimum wage to \$15 an hour alongside Maryland Working Families and Progressive Maryland. Previously, Nash had successfully lobbied to defeat a preemption bill from becoming law.



#### **MISSOURI**

Chair Morris Pearl testified alongside State Senator Rob Schaaf before the Missouri State Senate in favor of a bill supporting small donor campaign financing. While there, he also met with Governor Eric Greitens to discuss the bill.



#### **NEW HAMPSHIRE**

Morris Pearl and Chuck Collins speak to Keene State College's chapter of Democracy Matters about the importance of voting



#### **NEW YORK**

Patriotic Millionaires Leo Hindery, Jr. and Eric Schoenberg joined Chair Morris Pearl in Albany. The group spoke alongside New York State Senator Jeffrey Klein, Assemblyman Sean Ryan, and Citizen Action New York's Karen Schiff in support of closing the carried interest tax loophole. Hindery, Pearl, and Schoenberg were instrumental in getting the legislation sponsored.



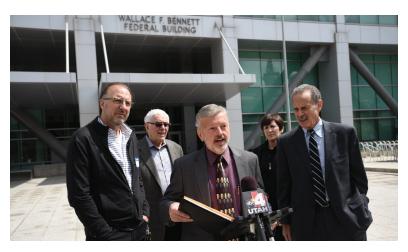
#### **NORTH CAROLINA**

In response to the North Carolina legislature's attack on democracy and support for HB2, the Patriotic Millionaires released a white paper titled So Goes the Nation: North Carolina. This paper connects the dots from racism as a political strategy to the unholy alliance with "religious" leaders to economic prospects of the citizens of the state. We presented this argument at the Urban League meeting in Charlotte, NC as part of an ongoing partnership with the organization.



#### **RHODE ISLAND**

Morris Pearl stood with the lead sponsors of the Rhode Island Carried Interest Fairness Act at a press conference at the Rhode Island State House.



#### **UTAH**

John Netto, Dick Gary, Jonathan Ruga, Elsa Gary, and Art Lipson spoke at Senator Orrin Hatch's state office demanding he raise taxes on the wealthy.

# **MEMBERSHIP**

Patriotic Millionaires members are investors, philanthropists, entrepreneurs, and business leaders. Members of the Patriotic Millionaires are engaged in a wide array of industries including technology, retail, real estate, entertainment, and finance, among others.

- Members of the Patriotic Millionaires have annual incomes of more than \$1 million and/or assets of more than \$5 million which may include funds in a family foundation.
- + Members may choose to be public or private members. Private members are fully engaged in the group's work, but choose not to have have their participation acknowledged on the website.
- Members support the organization with an annual contribution.

For a full list of our public members, please visit our website. www.PatrioticMillionaires.org

## MEMBER ENGAGEMENT

Members of the Patriotic Millionaires advance the "first principles" of equal political representation, a livable minimum wage, and a fair tax system by engaging with the media, our fellow citizens, activists, and lawmakers in a variety of public and private forums.

### Members engage in the following ways:

#### **EDUCATE**

- + Provide perspective and analysis to journalists and members of the media;
- + Participate in small forums with influencers and experts;
- + Speak at rallies and public forums;
- + Pen and place local, national, or international Op-Eds and LTEs;
- Share issue expertise and political insight with fellow members:
- + Provide blog posts and video content for social and traditional media.

#### **ADVOCATE**

- + Testify in front of lawmakers at the local, state, and federal level;
- Participate in Patriotic Millionaires Lobby Days to advance legislation with lawmakers and generate media attention with press events;
- + Meet privately with lawmakers and their staffs to discuss issues and legislation.

#### **FUND**

- Each member supports the education and advocacy work of the organization with an annual contribution at one of the following levels: Member, Advisory Board, or Cabinet.
- + Expand programs with capital campaigns.

## **HOW TO JOIN**

Patriotic Millionaires members endorse the first principles of equal political representation, a livable minimum wage, and a fair tax system. Members support the work with an annual contribution at one of the following levels:

#### **☐** MEMBERS

- + Contribute \$2,500+ annually
- + Includes all Member Benefits

#### ADVISORY BOARD

- + Contribute or Raise \$25,000+ annually
- + All Member benefits
- + Advisory Board quarterly strategy calls
- + Frequent engagement with president and senior staff

#### **CABINET**

- + Contribute or raise \$50,000+ annually
- + All Advisory Board benefits
- + Program or organizational leadership role

All Members may choose to be public, or to have their participation remain private. Private members are fully engaged in the group's work, but choose not to have their participation acknowledged publicly on the website.

Members may support either The Patriotic Millionaires, LLC, a 501c4 organization, or The Patriotic Millionaires Research Center, LLC, a 501c3 organization.

To join the Patriotic Millionaires, or for more information, please contact us at 202-446-0489 or info@patrioticmillionaires.org.

## **ADVISORY BOARD**



NAOMI ABERLY is a political activist and civic volunteer who focuses her efforts on women's health. Ms. Aberly is currently the Chair of the Board of Directors of Planned Parenthood Federation of America, a Vice Chair of the DNC's National Finance Committee, an Advisory Board Co-Chair of Organizing for Action, on the board of SiX- the State Innovation Exchange, and has served as a Co-Chair of Wendy Davis' campaign for Governor of Texas. She is a member of the Planned Parenthood Leadership Council, the Women Donors Network, and the EMILY's List Majority Council. She is also an active supporter of the Center for Reproductive Rights, the Center for American Progress, and the Texas Organizing Project.

LAWRENCE BENENSON is a Principal of the Benenson Capital Company and a member of the company's Investment Committee, involved in developing and implementing the company's investment strategies and internal operations as well as guiding the company's short and long-term planning. He guides the company's near-term and long-range planning and has helped Benenson Capital Partners grow to become one of the nation's premier owners of net-leased properties. He has been involved with the Benenson family business since 1990. Mr. Benenson is the Chairman of the Institute for the Study of Global Anti-Semitism and Policy and Head Co-Chairman of the Lincoln Center Real Estate and Construction Council. He serves on the Boards of the Mosholu Montefiore Community Center in the Bronx, the Museum for African Art, the Center for Arts in Education, American Folk Art Museum, the ART/OMI International Arts Center, the New York Junior Tennis League, the Al Hirschfeld Foundation, and the Ad Reinhardt Foundation. He also serves on the Boards of the Inner-City Scholarship Foundation and the Museum of Modern Art (MoMA). Previously, Mr. Benenson worked for Rose Associates, a real estate investment and development company specializing in Manhattan properties. Mr. Benenson holds a BA from Duke University. He is a member of the Real Estate Board of New York, Vice President of the Realty Foundation of New York, and a member of the International Council of Shopping Centers.



Chair Morris Pearl sitting with Commissioner Chuy Garcia and Illinois State Senator and gubernatorial candidate Daniel Biss for an Illinois strategy discussion

**DANIEL BERGER** is a Philadelphia lawyer specializing in complex litigation from the plaintiff's perspective including antitrust, securities, consumer protection, employment, environmental, and civil and human rights. Mr. Berger's firm has been a pioneer in the field of class action litigation and was one of two firms who filed the original class actions starting in the 1960s. For his long career in law, Mr. Berger was recently named as a "Titan" in the field of complex litigation by the publication Law 360. Mr. Berger is also very politically active and is the largest supporter of progressive political causes and groups in the Philadelphia area. He is currently a sponsor of the Progress and Open Society projects which are being co-sponsored with the Brookings Institute and which are investigating the nature of social, economic, and political progress in the historical sense along with how to re-start and enhance historical progress.

CHUCK COLLINS is an author and senior scholar at the Institute for Policy Studies where he directs the Program on Inequality and the Common Good and co-edits Inequality.org. He is the great-grandson of meatpacker Oscar Mayer and gave away his inheritance at a young age. Mr. Collins is an expert on U.S. economic inequality and has pioneered efforts to bring together investors and business leaders to speak out publicly against corporate practices and economic policies that increase economic inequality. He is co-author, with Bill Gates Sr., of Wealth and Our Commonwealth: Why America Should Tax Accumulated Fortunes. His most recent book is Born on Third Base: A One Percenter Makes the Case for Tackling Inequality, Bringing Wealth Home, and Committing to the Common Good. Mr. Collins is the co-founder of Wealth for Common Good, which merged into the Patriotic Millionaires in 2015.

**GEOFF COVENTRY** is a founding member, owner, and COO of Tradewind Energy, Inc. Together with his two business partners, Coventry has overseen the growth of Tradewind from a startup to one of the nation's largest independent developers of wind and solar energy projects. Prior to Tradewind, Mr. Coventry was a co-founder and vice president of NetSales, Inc., one of the first companies to provide outsources electronic commerce services to businesses. The core business was sold to Digital River, Inc. in 2001. As a proponent of sustainable prosperity, an advocate for a national Job Guarantee, and a serious student of modern money theory (MMT), Mr. Coventry enjoys writing about how nations should use their currency-issuing power to address major social, economic, and ecological challenges. Mr. Coventry holds a degree in business administration from Baker University in Kansas and is a native of New Zealand.

**ALAN DAVIS** is president of The Leonard and Sophie Davis Fund, a private family foundation. Mr. Davis is the Director of the WhyNot Initiative, the foundation's program to support social change efforts that have the potential to significantly address problems with the democratic process, income and wealth distribution, universal healthcare, and tolerance. He was founder and CEO of Conservatree Paper Company, the leading distributor of recycled paper, and founder and CEO of ASDavis Media Group, a publisher of more than 40 travel guidebooks.

**DAVID DESJARDINS** was employee number 20 at Google, where he worked as a software engineer from 1999 to 2005. He is a member of the board of the Tigerlabs technology incubator, a member of the Corporation of the Massachusetts Institute of Technology, a trustee of the University of California at Berkeley Foundation, a consultant at the Center for Communications Research at Princeton, a member of the steering committee of the Scholars Strategy Network, and a member of the board of the Democracy Alliance.

**PHILIP EDMUNDSON** co-founded WGA, an insurance brokerage specializing in technology companies, in 1983. He sold the business in 2015 to Arthur J. Gallagher and Co.

Mr. Edmundson is a Trustee of the Boston Symphony Orchestra, the Trustees of Reservations (a conservation organization), the Beth Israel Deaconess Medical Center, and a Director of the Massachusetts Budget and Policy Center. He is the former Chair of the Board of the Alliance for Business Leadership, a progressive business organization in Massachusetts. He served as Chair of the Affordable Care Today coalition when it brought together labor, consumer, business, and provider organizations to pass Massachusetts Healthcare Reform legislation in 2006, a precursor to the Affordable Care Act nationally.

Mr. Edmundson is an honors graduate of Amherst College, with a B.S. in Psychology/Neuroscience, where he was elected to Sigma Xi, the national scientific honor society. Mr. Edmundson received his Masters of Business Administration degree with honors from Babson College. He also received a Masters of Public Policy degree from the Kennedy School at Harvard University.

JERRY FIDDLER is founder, CEO and Chairman of Wind River Systems, a software design and consultancy firm with a market cap of over \$1 billion. Mr. Fiddler founded Wind River out of a rented garage and by 2009, the company was the leading provider of embedded software worldwide; its operating systems could be found in millions of devices and was used in historic projects including the NASA Clementine moon probe and all of the Mars rovers and landers. Mr. Fiddler is currently the Chairman of Solazyme, a biotech company doing groundbreaking work in renewable energy, and the Principal of Zygote Ventures, a privately held venture capital fund. Mr. Fiddler serves on the UC President's Advisory Board on Science and Innovation, the foundation board of Chabot Space & Science Center, and is a trustee of the Mathematical Sciences Research Institute and The California Jazz Conservatory.

DR. GAIL FURMAN is a leading child and adolescent psychologist in Manhattan. She has been in private practice treating children, adolescents, and their families for over 45 years and was the psychologist at both the Fieldston School and the Dalton School from 1973-1990. Dr. Furman serves on the executive boards of Human Rights First, Leadership Enterprise for a Diverse America (LEDA), The Brennan Center for Social Justice at NYU Law School, and Auburn Seminary. She is also a member of the Council on Foreign Relations, and is an assistant clinical professor at New York University, where she is a consultant to the Child Study Center. Dr. Furman is also one of the founders of the Family Academy, a model experimental school in Harlem providing academic, social, and mental health services for students and their families. She has been instrumental in developing collaborations and innovative partnerships to provide more competent, comprehensive service to inner-city children and families.

**ELLYN GELSON** is a California-based philanthropist who has long supported organizations focused on arts and culture, education, medical research, and charities that provide assistance to the disabled and disenfranchised. Ms. Gelson learned the lessons of philanthropy from her late husband Bernard, the founder of Gelson's Markets, an upscale supermarket chain in Southern California. Together, the two were committed to a living wage, to lending a helping hand to those who need it, and to providing a quality education—be it at a trade school or a university—so that everyone can enjoy the dignity that comes from contributing to society. Ms. Gelson continues to champion those values today.

**JEFFREY GURAL** is Chairman of Newmark Grubb Knight Frank, an international commercial real estate firm covering 320 offices worldwide. Prior to joining Newmark Grubb Knight Frank, Mr. Gural was a member of the staff of Morse-Diesel Construction Co. Mr. Gural is recognized as an invaluable member of the Greater New York community, and serves as a member of the Board of Directors for the Real Estate Board of New York, a member of the Board of Directors of the UJA-Federation, Chairman of the "I Have a Dream Foundation – NY," and Co-Sponsor of the Chelsea-Elliot "I Have a Dream" Project," Chair of the Board of Governors for Eugene Lang College- The New School for Liberal Arts, and many more.

MONICA GRAHAM was founder and General Partner of Graham Partners, a technology focused hedge fund based in New York, from 1996-2010. From 2010-present she acts in an advisory role to the organization. Ms. Graham began her career at Oppenheimer & Co. before working at Drexel Burnham Lambert. She then worked as an analyst at Sloate, Weisman, Murray, & Company. After her time at Sloate, Ms. Graham founded her own consulting firm, Graham Investment Advisors, which advised hedge funds, before founding Graham Partners. After leaving Graham Partners as General Partner, Ms. Graham has since founded and presently runs the Graham Family Foundation. Currently, Ms. Graham serves as Chair of the Board of Integrity First for America, an organization founded to protect democracy through litigation and public awareness.

**LEO HINDERY, JR.** is Co-chair of the Task Force on Jobs Creation, founder of Jobs First 2012, and a member of the Council on Foreign Relations. An investor in media companies, he is the former CEO of AT&T Broadband and its predecesors, Tele-Communications, Inc. (TCI) and Liberty Media.

KEITH MESTRICH is the President and Chief Executive Officer of Amalgamated Bank and brings with him 25 years of experience working with the bank's core constituencies in the labor movement and non-profit organizations. Mr. Mestrich is a leader in the movement for labor unions and nonprofit organizations to build wealth for a purpose, not just a profit. Previously, he advocated for the rights of working people as the CFO and Deputy Chief of Staff for SEIU and as an organizer for the AFL-CIO and UNITE. Mr. Mestrich is a Fellow of the inaugural class of the Finance Leaders Fellowship Program and a member of the Aspen Global Leadership Network. He currently serves on the Board of Directors of The Roosevelt Institute, Democracy Alliance, Progressive Congress, Sidney Hillman Foundation, Capital and Main, The Workers Lab, Working America Education Fund, The Public Utility Law Project, Hot Bread Kitchen, and the Remember the Triangle Fire Coalition. He serves on the Advisory Boards of Girls Who Invest, is a Trustee on the Consolidated Retirement Fund, and a member of the Habitat for Humanity NYC Leadership Council. Mr. Mestrich was recently named one of Washington Life Magazine's "Power 100" top influencers and appeared on City & State's "25 Most Influential Leaders in Manhattan" list.

**SCOTT NASH** is the founder of MOM's Organic Market, an organic grocery chain that promotes environmental justice. Started in 1987 out of his mom's garage with an initial investment of \$100, MOM's has grown to become one of the nation's premiere chains of family owned and operated organic grocery stores. With approximately 1000 employees and \$200 million in annual revenue, MOM's operates 17 stores in the Washington/Baltimore/Philadelphia region, with plans to expand into the Northeast corridor over the next several years.

MORRIS PEARL currently serves as Chair of the Patriotic Millionaires, a group of hundreds of high-net-worth Americans who are committed to making all Americans, including themselves, better off by building a more prosperous, stable, and inclusive nation. The group focuses on promoting public policy solutions that encourage political equality, guarantee a sustaining wage for working Americans, and ensure that millionaires, billionaires, and corporations pay their fair share of taxes.

Previously, Mr. Pearl was a managing director at BlackRock, one of the largest investment firms in the world. His work included the Maiden Lane transactions and assessing governments' potential losses from bank bailouts in the United States and in Europe. Prior to BlackRock, Mr. Pearl had a long tenure on Wall Street where he invented some of the securitization technology connecting America's capital markets to consumers in need of credit. He is a CFA Charter Holder, a member of the CFA Institute, the New York Society of Securities Analysts, and on the board of Verified Voting and The Center for Political Accountability. Mr. Pearl lives in New York City with his wife Barbara where he enjoys spending time with his two adult sons and riding his bicycle around the city.

STEPHEN PRINCE is the Vice-Chair of the Patriotic Millionaires and a businessman who founded National Business Products, now known as Card Marketing Services, in 1993. In the early years of his company, Mr. Prince focused attention on finding innovative print solutions for the credit, debit, and prepaid segment of the payments industry. As the gift card phenomenon began to evolve in the late '90's, he switched the company focus from one that provided heavy paper print offerings to one whose primary product line was printed plastic cards and support materials for that market segment. Today, as gift and loyalty card programs have proliferated and grown, Mr. Prince is invited to deliver his "gift card gospel" to sales staffs, merchant clients as well as potential platform partners all over the U.S. Of late, he has become more and more involved in startups, primarily in the payments industry, where and when his technology experience enhances an opportunity. Mentoring young entrepreneurs is something he not only enjoys but is something he feels is his responsibility.

JAMES S. "GREAT NECK" RICHMAN is President and CEO of Richloom Fabrics Group, a textile convertor, designer, and distributor of home furnishing fabrics located in New York, with subsidiaries offices in Shanghai and Gurgaon. Mr. Richman runs the Richloom Family Foundation, which has set up the Endowed Scholarship at George Washington University and Case Western Reserve University, the Richman Visiting Professorship at Brandeis University, and given major donations to Jewish Philanthropic America and other organizations. Mr. Richman serves on the Board of Overseers at the New York University Stern School for Business, the Advisory Committee at Case Western Reserve University, and the Board of Trustees of the Atlanta High Museum of Art. He is also associated with several New York City Local Charities, such as the Association to Benefit Children and Publicolor.

**ERIC SCHOENBERG** is Chairman of CampusWorks, Inc., a provider of technology leadership services to universities and colleges. Dr. Schoenberg also conducts research on the psychology of money and asset market bubbles, and has taught classes in behavioral economics, decision making, family wealth, and leadership at Wharton, Columbia Business School, NYU's Stern School of Business, and the Haas Business School of the University of California at Berkeley. Previously, he was Managing Director and Chief Knowledge Officer of Broadview International, a boutique investment bank offering merger and acquisition advisory services to Information Technology companies. Before that, he served as a Foreign Service Officer in the U.S. Department of State.

**RYAN SMITH** lives and works in Salt Lake City, Utah. Mr. Smith has worked in the Venture Capital/Angel Investing space for the past 15 years. Mr. Smith is the founder of Variance Ventures and a partner in startup incubator Boomstartup, and mainly invests in the software/hardware space and in health diagnostics. Mr. Smith became involved in progressive political issues via the Obama campaign and continues to work with groups such as Democracy For America, Organizing For Action, and New Media Ventures to name a few. Mr. Smith is proud to support the Patriotic Millionaires movement as he sees most issues through the economic lens.



Patriotic Millionaires arriving at the Capitol to lobby for raising the minimum wage

**JOE ZIMLICH** is the Chief Executive Officer of Bohemian Companies. Bohemian Companies is a private investment office committed to innovative and sustainable investment opportunities that often target social impact as well as financial returns. Mr. Zimlich also serves on the board of Bohemian Foundation, a family foundation.

Mr. Zimlich has held board or director level positions in the following industries: technology, semi-conductors, water filtration, trust, private & commercial banking, food service, and venture-capital funds. Joe served previously as a manager in mergers and acquisitions and as a specialist in the not-for-profit and banking industries, both at an international accounting firm. He currently serves as a Board member for Bohemian Foundation, First Western Trust Bank, Ampt, LLC, Democracy Alliance, Third Way, Committee On States Executive Committee, America Votes Executive Committee, Colorado Democracy Alliance Executive Committee, and Colorado Donor Alliance.

Mr. Zimlich graduated from the University of Iowa with a BBA in Accounting. He is a Certified Public Accountant (CPA) and a Professional in Human Resources (PHR). He has been active in his community of Fort Collins, Colorado, notably with the Colorado State University System Board of Governors (where he previously served as Board Chair), Colorado State University's College of Business Global Leadership Council, EnviroFit International, the Economic Opportunities Advising Committee, Community Development Block Grant Committee, Fort Collins Museum of Discovery, Human Resources Ordinance Task Force, and Leadership Fort Collins.

GEORGE ZIMMER is the Founder and former CEO and Chairman of The Men's Wearhouse. Founded in 1973, he led the Company as Chief Executive Officer through 2011, at which time he named a successor. Mr. Zimmer is an active Advisory Board member with the Oakland Zoo and the Boys and Girls Club of Oakland, and has served on numerous other boards, both for profit and non-profit, throughout his career. Mr. Zimmer is widely recognized in his community for his philanthropic efforts, which include the Institute of Noetic Sciences, Chabot Space & Science Center, and Northern Lights School, all in the Bay Area. He received Honorary Doctorates from Holy Names University, the Institute of Transpersonal Psychology, and the University of Redlands. Mr. Zimmer earned a Bachelor of Arts in Economics from Washington University in 1970.

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