



*The Philanthropic Planning Newsletter of Haverford College*

# WINDOW TO THE FUTURE

*Spring 2021*

## NATE SHADE '16

Meet the Youngest-Ever Member of the Jacob P. Jones Society



*Nate Shade's career in finance has included positions in New York City and San Francisco.  
Photo by Erin Lubin.*

Originally from Baltimore, where he graduated from a small high school, Nate Shade '16 describes his landing at Haverford as “fate.” Initially drawn to the idea of attending a large research university, an impromptu visit to the Haverford College Arboretum changed his thinking. “From the moment I set foot on campus,” he said, “something just felt right. I ended up returning a few weeks later to do a full visit and applying early decision.”

Nate arrived at Haverford with an open mind as to his course of study and career trajectory. He was an eager scholar-athlete, playing squash all four years and serving as team captain during his junior and senior years. Thinking his dream job of becoming the general manager for the Baltimore Orioles might be a bit of a stretch upon graduation, Nate noted similarities between the resource allocation on a Major League Baseball roster and the resource allocation that factors into decisions in the financial markets. He



A scholar-athlete, Nate played squash all four years at Haverford.

Photo courtesy of Haverford Athletics.

decided on economics as his major and, following his sophomore year, secured a summer internship as a research analyst supporting the chief investment officer of an equity fund in the Washington, D.C. area.

Nate coupled the internship with funding from the prestigious Whitehead Internship Program, named for John C. Whitehead '43, which is designed to encourage rising sophomores and juniors to gain work experience in entrepreneurial endeavors, small business enterprise, venture capital, or investment finance. He relished his time at the internship because it mirrored his coursework in economics at Haverford, where all students learn to conduct research to develop, write about, and defend their ideas. Nate's interest in a full-time career in financial services was solidified as a result.

When recruiters from J.P. Morgan visited campus through the Center for Career and Professional Advising, Nate landed a formal internship the summer between his junior and senior years. That experience ultimately led to a full-time offer to join the firm in the asset management division in New York City upon graduation. To make the transition from research to investment banking, he networked

with alumni and sought their advice to prepare for interviews. He moved into tech investment banking at a firm in New York City before landing his current role at J.P. Morgan in San Francisco.

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*“Haverford is my number one philanthropic endeavor. I want to see the College succeed, to be the best in its class and among its peers.”*

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Nate is passionate about his work—thinking through the evolution of a company, identifying core strengths, and addressing issues creatively and completely so that a company can achieve its objectives, whether through the capital markets or mergers and acquisitions. He draws a parallel between the strategic demands of business and Haverford's work at the institutional level, recognizing the corporate perspectives needed by the Board of Managers and imagining himself taking a seat at the table one day. “Doing well enables me to give back to Haverford and to help more students,” he says.

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*“Giving to an institution that means so much seems like the right thing for me. Haverford has shaped who I am, and I am proud to join my fellow alums who have decided to make Haverford part of their own legacy.”*

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As a co-chair of the Fords in Finance affinity group, Nate remains actively involved with current students around their career aspirations, conducting mock interviews and mentoring fellow Fords on their respective paths in the field. He maintains that a background in the liberal arts—as opposed to an undergraduate business school experience—can be a strong differentiator for candidates in finance and investment banking as they present themselves through a compelling story. “At Haverford I became very confident speaking, and speaking up in the first place. You are challenged to have an opinion and to defend it—something you need to do as you move into senior professional roles.”

Haverford also challenges and encourages its students to live a life of service. In his own chosen field as an adviser to clients navigating important strategic decisions, Nate sees himself as providing a service and, in so doing, living a life of service. “It is really rewarding to help with these difficult decisions, build relationships with clients, and ultimately help them prepare for their next stage of growth and success for many years to follow.”

With his fifth reunion ahead, Nate has already become an admission volunteer and loyal annual giving supporter. Philanthropy and service meld in his commitment to the College. “Haverford is my number one philanthropic endeavor,” Nate explains. “I want to see the College succeed, to be the best in its class and among its peers. I want to do my part so that it can execute on its mission and be further recognized for its excellence.”

In sharing his plans to include the College as a beneficiary, he recently became the youngest-ever member of the Jacob P. Jones Society. The society recognizes those who have provided for Haverford through their estate or retirement plans, or through a life-income gift.

“I have always known that there would be a place for Haverford in my plans,” Nate explains. “Giving to an institution that means so much seems like the right thing for me. Haverford has shaped who I am, and I am proud to join my fellow alums who have decided to make Haverford part of their own legacy.”

## IT'S EASY TO DESIGNATE HAVERFORD AS YOUR BENEFICIARY

Beneficiary designations determine who receives the assets of a particular account and they take precedence over the terms of a will. Transferring assets to Haverford this way is quick, simple, tax-advantaged, costs you nothing in legal fees, and is revocable should your circumstances change.

### **Retirement Plans and IRAs**

When you make Haverford your beneficiary, none of the assets are taxed. Transfer the full balance, a percentage, or a specific dollar amount.

### **Donor Advised Funds (DAFs)**

It is important to name successor advisers or a charitable beneficiary like Haverford to ensure that the assets pass as you designate rather than revert to the managing institution.

### **Life Insurance**

If you have a fully-paid policy that no longer meets your family's needs, designate Haverford as the beneficiary. This often enables you to make a larger gift than imagined.

### **Next Steps**

Simply contact the managing institution for a printed form or the link to their online beneficiary designation form. Be sure to keep a copy for your records and to inform the College of your intentions.

When you designate Haverford, you will become an immediate member of the Jacob P. Jones Society, which celebrates donors of planned gifts. As a member, you help perpetuate the College's mission and create your own enduring legacy at Haverford.

**To learn more about supporting Haverford, contact Olga Briker at [obriker@haverford.edu](mailto:obriker@haverford.edu) or (610) 795-6079.**