

Colonial Williamsburg

The Colonial Williamsburg Foundation
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Fiorina, Montgomery and Shaheen Elected Trustees of the Colonial Williamsburg Foundation



WILLIAMSBURG, Va. (May 8, 2017) – The Colonial Williamsburg Foundation board of trustees has elected former Hewlett-Packard CEO Carly Fiorina, The Optimal Service Group of Wells Fargo Advisors Managing Director Joseph W. Montgomery, and retired Caterpillar, Inc. Group President Gerald L. Shaheen to serve as trustees of the Foundation.

“From its establishment more than nine decades ago, Colonial Williamsburg’s success has depended on the stewardship of great leaders with varied backgrounds who share devotion to our mission of education and preservation,” said Henry C. Wolf, chair of the Colonial Williamsburg Foundation board of trustees and vice chairman and CFO, retired, Norfolk Southern Corp. “Carly, Joe and Gerry bring to the Foundation extraordinary leadership experience that spans manufacturing, technology, finance and public service at the local, national and international levels. We welcome each of them and look forward to the wise counsel they will provide.”

At Hewlett-Packard Fiorina was the first woman to lead a *Fortune* top-20 company after rising from an entry level position at AT&T to become that company’s first female officer. She led AT&T’s spin-off of its manufacturing arm as Lucent Technologies, then oversaw Lucent’s North American operations. She sought public office in campaigns for U.S. Senate in 2010 and for president of the United States in the 2016 election.

Montgomery is an alumnus of the College of William & Mary who joined his Williamsburg firm’s predecessor, Wheat First Securities, in 1975 and is among the nation’s most respected financial advisors. He has regularly been named to top nationwide advisor lists by the *Financial Times*, *Barron’s*, *Worth*, *Registered Representative* and *Forbes*. His firm specializes in services for high net-worth individuals, institutions and corporations.

With Caterpillar Shaheen was responsible for the design, development, and production of the company's large construction and mining equipment, as well as the company's U.S. operations division. He also oversaw its marketing and sales operations in North America, its components business, and its research and development division. During his 41 years with the company, he held numerous marketing and management positions in the United States and Europe, and at one time held responsibility for business in Europe, Africa, the Middle East and the former Soviet Union.

“Colonial Williamsburg is at a pivotal moment as we work to engage new audiences and to ensure our treasured institution's long-term health,” said Mitchell B. Reiss, president and CEO of Colonial Williamsburg. “With the support of leaders like Carly, Joe and Gerry we can be confident that we will make the right decisions now for the future of the Foundation, its mission and our community.”

Fiorina also served as chair of Good360, the world's largest products philanthropy, as chair of the CIA External Advisory Board and on the Pentagon's Defense Business Board. She has also served on James Madison University's board of visitors and as a trustee of the Massachusetts Institute of Technology, and of companies including Kellogg's, Taiwan Semiconductor Manufacturing Co., Merck, Cisco and Zurich International. Fiorina earned her Bachelor of Arts degree from Stanford University, her Master of Business Administration from the University of Maryland and her Master of Science in management from the MIT Sloan School of Management.

“Our nation is a beacon of freedom and opportunity thanks to men and women who united with common cause so that they and generations that followed could live not as subjects but as citizens,” said Fiorina. “Like no other institution, Colonial Williamsburg preserves and shares the sites and stories of America's establishment and ideals, and I'm thrilled to be a part of its critical mission.”

Montgomery is a trustee of the Virginia Retirement System, a director of the Virginia Capitol Foundation, a director of the Future of Hampton Roads Inc., a Randolph associate of the Dean's Circle of the William & Mary School of Business and a member of the William & Mary President's Council. He served on the William & Mary Board of Visitors, the Colonial Williamsburg National Advisory Council, as president of the William & Mary Alumni Association, as vice president of the Jamestown-Yorktown Foundation's board of directors, as a director of the Williamsburg Community Hospital, as a trustee of Hampton Roads Academy and the Greater Williamsburg Community Trust. He is a recipient of the Alumni Medallion from the William & Mary Society of the Alumni and a member of the William & Mary Athletic Hall of Fame and All-time Football Team.

“My devotion to Colonial Williamsburg dates to my time as an undergraduate at William & Mary, and it's been a privilege to serve the Foundation on its National Advisory Counsel and now as a member of the board,” Montgomery said. “Colonial Williamsburg is a treasure for the nation and world, but it is also fundamental to our community and region, and I look forward to supporting the Foundation's pursuit of its critical mission now and for years to come.”

Shaheen is a board member and past chairman of the U.S. Chamber of Commerce. He also serves on the boards of Ford Motor Company and AGCO Corp. He chairs the OSF Illinois Neurological Institute board and serves as a trustee of the National Multiple Sclerosis Society - Greater Illinois Chapter and Peoria NEXT. He is former chairman of the Bradley University board of trustees and president of its alumni association. He also served as board member of the National Chamber Foundation, Aquila Inc. and National City Corp. Shaheen earned his Bachelor of Science and Master of Business Administration degrees from Bradley and completed

the Tuck Executive Program at Dartmouth College. He has been recognized by Bradley as a Distinguished Alumnus and is a member of its Centurion Society.

“Colonial Williamsburg is a vital institution, and its continued success requires that we maintain our commitment to the past as we look to our future,” said Shaheen. “Here, Americans forged ideals that still guide our nation and the world, and Colonial Williamsburg will thrive by telling their stories in new ways to new audiences. I look forward to playing a part, and I thank my fellow board members and the entire Foundation for this opportunity.”

The other members of the Colonial Williamsburg Foundation board of trustees are Vice Chair Steven L. Miller, chairman and president, SLM Discovery Ventures; Catharine O’Neill Broderick, former trustee, Rockefeller Brothers Fund; Mark A. Coblitz, senior vice president, retired, Comcast Corp.; Thomas F. Farrell II, chairman, president and CEO, Dominion Resources; Annette Gordon-Reed, Harvard University; Conrad Hall, president and CEO, retired, Dominion Enterprises; Antonia Hernández, president and CEO, California Community Foundation; Jo Ann Jenkins, CEO, AARP; Justice Anthony M. Kennedy, U.S. Supreme Court; Mark J. Kington, managing director, X-10 Capital Management, LLC; John A. Luke Jr., chairman, WestRock Company; Judith A. McHale, president and CEO, Cane Investments, LLC; Leslie A. Miller, principal, Leslie A. Miller Esq., LLC; Cynthia H. Milligan, dean emeritus, University of Nebraska, and president, Wood Stieper Capital Group; Thurston R. Moore, partner, Hunton & Williams; Thomas K. Norment Jr., Virginia state senator and counsel, Kaufman & Canoles; Reiss; Joseph Christopher Simmons, managing partner, retired, PricewaterhouseCoopers, LLP; Sheldon M. Stone, principal and portfolio manager, Oaktree Capital Management, L.P.; and Y. Ping Sun, university representative, Rice University.

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Colonial Williamsburg operates the world’s largest living history museum, preserving Virginia’s 18th-century capital as a fully functioning city. Fun, engaging experiences transport guests back in time and highlight the relevance of America’s founding era to contemporary life. The Colonial Williamsburg experience includes more than 500 restored or reconstructed buildings, historic trade shops, renowned museums of decorative arts and folk art, extensive educational outreach programs for students and teachers, lodging, culinary options from historic taverns to casual or elegant dining, the Golden Horseshoe Golf Club featuring 45 holes designed by Robert Trent Jones Sr. and his son Rees Jones, a full-service spa and fitness center managed by Trilogy Spa, pools, retail stores and gardens. Philanthropic support and revenue from admissions, products and hospitality operations sustain Colonial Williamsburg’s educational programs and preservation initiatives.

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