

ABOUT US

FWA was established in 1956 when eight enterprising women on Wall Street met to share professional experiences and further their knowledge. Today, our non-profit organization proudly supports over 800 members worldwide and promotes the professional development and advancement of all women through education, mentorship, scholarships, networking, and alliances across the financial community.

WHO WE ARE

FWA Is a Community United by Purpose

Our goal:

Advance the leadership growth and accelerate the success of all women in the financial community.

Vision:

A world in which women have equitable representation and recognition across all levels of the financial community.

Mission:

Promote the professional development and advancement of all women through education, mentorship, scholarships, networking, and alliances across the financial community.

EMPOWERMENT

We are unwavering champions, empowering our members and organizations to achieve inclusive, equitable representation at all levels for women in finance.

COMMUNITY

We engage and connect members by providing a supportive community that recognizes all contributions while fostering collaboration and accountability to realize our common goals.

DEVELOPMENT

We are a community of lifelong learners committed to personal and professional development for ourselves and the next generation through education, mentorship, scholarships, networking, and alliances.

FWA IN ACTION

FWA connects a vibrant community of dynamic financial professionals and proactive institutions focused on development and empowerment to **advance leadership growth and accelerate the success of all women in finance.**

FWA promotes the professional development and advancement of all women through education, mentorship, scholarships, networking, and alliances across the financial community.

With a rich history since 1956, over 800 members and numerous corporate, government and academic allies, **FWA** is ideally positioned to address the challenges facing women today and help realize a **world in which they have equitable representation and recognition across all levels of the financial community.**

[JOIN US!](#)

[BECOME A CORPORATE SPONSOR](#)

FWA puts action behind its words by:

Furthering knowledge with outstanding programs that explore social concerns, technology, and financial and political issues.

Expanding horizons through international conferences and regular briefings with government officials and industry leaders.

Contributing to our communities as reflected in 20+ years of scholarships and mentoring programs, internships, and community service activities.

Within the financial services industry, the FWA provides a public forum for examining important contemporary issues in business, finance, governmental policy and civic affairs.

OUR MEMBERSHIP

FWA mirrors the dynamic financial services industry with a diverse membership that illustrates the breadth and depth of opportunities and occupations.

In addition to engaged members from all levels in private industry and the public sector who share their expertise with others, FWA benefits from exceptional collaboration with corporate sponsors and [alliances](#). As members of the [FWA's President's Circle](#), these companies demonstrate their advocacy of women's leadership initiatives – increasingly important to top firms looking to develop talent, retain key employees, and recruit high-potential staff.

OUR ACTIVITIES

From personal to professional life, FWA offers exciting programs each year designed to broaden horizons and enhance skills.

By fostering an ongoing dialogue on contemporary issues, FWA fulfills a need for timely information on specialized industry and community affairs topics. Prominent speakers regularly take the podium at FWA events to share their ideas with members. From global marketplace issues to corporate support for education, from regulatory trends to business ethics, the scope of discussion reflects the wide variety of member interests.

RECOGNIZING THE ACHIEVEMENTS OF WOMEN LEADERS

FWA is committed to highlighting the achievements of distinguished women, bringing members and leaders together for interactive exchanges throughout the year. [FWA's Pacesetter Program](#) is a continuing partnership with FWA President's Circle sponsorship companies that recognizes outstanding women who exemplify the character, achievement, passion, and leadership that is critical to the organizational success and to the support and development of the next generation of women leaders within those firms. Special events and ongoing programming offer professional development and networking opportunities. Activities address topics from mentoring and scholarships to corporate board advocacy and referrals.

PREPARING THE NEXT GENERATION OF LEADERS

FWA scholarships, financial literacy workshops, community service activities — and mentoring programs — have benefited more than 6000 individuals over the past 30 years.

FWA provides members opportunities to share their knowledge and experience as [financial literacy](#) educators and [mentors](#) to high school, college, and graduate students.

[FWA's Wall Street Exchange](#) is a career development program designed to augment the summer internship experience of select qualified rising college seniors. The program consists of a series of weekly events (8 weeks) hosted by top financial services firms and focuses on professional and personal development.

HONORING OUTSTANDING LEADERS

For over 30 years, FWA has honored a woman leader in the public sector and another in the private sector as FWA Women of the Year for their achievements, leadership, and professionalism. These awards, along with awards for other outstanding/notable honorees, are presented at the [Annual Summit and Awards Ceremony](#), the FWA's major fundraising event supporting our nationally acclaimed scholarship, mentoring and summer training programs.

PRESENTING DISTINGUISHED SPEAKERS

Through our Distinguished Speakers programs, the FWA introduces members to CEOs and other senior corporate executives. We learn how these leaders perceive and resolve key strategic issues, share success stories of accomplished women leaders and hear how corporations promote the capabilities and potential of female executives.

SUPPORTING PROFESSIONAL AND PERSONAL GROWTH

Professional development and educational programs are central to enhancing personal effectiveness and continuing professional growth. With seminars exploring topics such as estate planning, investment strategies, caring for aging parents, and strategies for working mothers, FWA equips members with necessary knowledge to navigate their private and professional lives.

[FWA's Career Center](#) connects members with employers specifically interested in hiring women.

[FWA Resume Book](#), open to members seeking employment and produced twice each year, is shared with recruiting partners at participating President's Circle firms and other corporate sponsors.

[Back2Business™](#), offered in partnership with four sponsoring organizations, is a unique and innovative program providing opportunities for individuals who have left the workforce to return in a way that recognizes the extra support they may require to re-start and re-establish their careers.

[Mentor2Mentor](#), a peer-to-peer member benefit, pairs members to mentor one another.

ACHIEVING NATIONAL AND INTERNATIONAL INFLUENCE

To encourage ongoing dialogue between the financial community and the public sector, FWA sponsors fact-finding forums in the United States and abroad. These local, national and international forums enable members to gain needed insights into the turning points and trends that shape our global economy. We go right to the scene to meet with business and government leaders who influence the world's events.

With a rich history since 1956, over 800 members and numerous corporate, government, and academic allies, FWA is ideally positioned to address the challenges facing women today and help realize a **world in which they have equitable representation and recognition across all levels of the financial community.**

Revised: November 2021

Formed in 1998, the FWA President's Circle serves as the official corporate sponsorship program of the Financial Women's Association. Through these strategic partnerships, the FWA and its top corporate sponsors jointly focus on the FWA's core mission to promote professionalism in the financial industry and leadership roles for women. This is accomplished by exchanging best practices regarding women in business, showcasing industry thought leaders, creating interesting programmatic content, and enhancing the mentoring, scholarship, and professional development initiatives offered to young women and men.



Advantages of Firms participating in the FWA President's Circle:

- Demonstrating a visible commitment to cultivating diverse and forward-thinking financial leaders
- Providing FWA members' *off-the-job training for on-the-job success*; many FWA members volunteer on the FWA board and more than 30 committees
- Developing joint programming with the FWA as President's Circle firms underwrite and help organize
- Networking among peers and exchanging best practices about women in business through the FWA President's Circle Strategic Advisory Council
- Accessing talent through the FWA membership, students in the FWA Wall Street Exchange program, Back2Business returnship program, mentees in the Baruch mentoring program, and the recipients of the FWA graduate scholarships

FWA corporate sponsors also benefit from complimentary memberships for corporate executives and increased visibility through participation in our Annual Celebration and positioning on the FWA website.

CORPORATE SPONSORS

BMO Capital Markets
BNP Paribas
BNY Mellon
Brighthouse Financial
Citizens Bank
Deloitte LLP
ING

MUFG
New York Life
Prudential/PGIM
Sidley Austin, LLP
S&P Global
Sumitomo Mitsui Banking Corporation
Wells Fargo Advisors

FRIENDS OF THE FWA

DSM Capital Partners
Joele Frank, Wilkinson Brimmer Katcher
n-Tier

Republic Capital Group
The Home Depot

The Pacesetter Program

The FWA's proprietary leadership program
for President Circle Company Women

Who are the
Pacesetters?

Upwardly mobile women who have distinguished themselves
in their organizations and have the aspiration, talents and
exemplary skills that set the pace for excellence.

2021 Pacesetters: The FWA is proud to sponsor its specialized leadership development program for high potential women from the FWA's President's Circle Companies. At the FWA, we believe the word "pacesetter" has always applied to that group of elite companies that have partnered with us. The Pacesetter Program is a continuing partnership with the President's Circle organizations that recognizes outstanding women within those companies who exemplify the character, achievement, passion, and leadership that is critical to organizational success. The Pacesetter Program was launched in 2015 as an additional benefit to President's Circle Companies and to support the development of the next generation of women leaders within those organizations.

We are pleased to present the sixth Pacesetter cohort of twenty-seven dynamic women for 2021/22:

Class of 2021-2022



Julia Miller
BMO Capital Markets



Samantha Stogsdill
BMO Capital Markets



Claudine Fernandez
BNP Paribas



Ashley Massaro
BNP Paribas



Carolina Lima
BNY Mellon



Renee Tan
BNY Mellon



Alexandra Hill
Brighthouse Financial



Anna Koska
Brighthouse Financial



Erica Brookman
Citizens Bank



Kristin McMillen
Citizens Bank



Aubrey Buono
Deloitte



Vinitha Viswanath
Deloitte



Roxanne Garcia-Quinonez
Eversheds Sutherland



Chelsea Marmor
Eversheds Sutherland



Marta Bede
ING Capital LLC



Tarryn Pournara
ING Capital LLC



Reema Sharma
MUFG



Ellen Tang
MUFG

Class of 2021-2022



Liron Asher
NY Life



Shikha Bajracharya
NY Life



Anastasia Boukouvala
Prudential Financial



Perry McCarthy
Stifel



Ellen Sands
Stifel



Anastasia Saglovitch
SMBC



Zoe Weiss
SMBC



Lindsey Gresham
TD Securities



Nadia Hossain
TD Securities

The Pacesetter Program

The **Pacesetter Program** offers participants the opportunity to focus on specific objectives and needs which are relevant to their leadership development and career advancement.

Early in the fiscal year, a customized development plan is created. From there, participants will:

- Be mentored by a senior FWA member and coached by a professional executive coach
- Attend dedicated workshops designed to build key leadership skills
- Meet senior leaders from President's Circle Companies and benefit from their insights, perspectives, and experience
- Attend workshops and other interactive sessions with professional development experts, authors, organizational development specialists and renowned leaders
- Expand their networks while developing personal and professional bonds with their cohort group, previous cohorts and others in the FWA
- Receive a complimentary FWA membership and enjoy the many membership benefits
- Be recognized at the FWA's Annual Reception and featured in its member communications
- Attend FWA events and be welcomed into the FWA community

"I am most looking forward to gaining industry insights, and take advantage of opportunities to work with C-suite level mentors and executive coaches who are committed to help me grow and develop both personally and professionally."

*Shannon Seidel, MBA
Director, Project Management
Enterprise Services & Systems
Prudential*

Over the course of the year, participants can anticipate 10 leadership development events which are supplemented by group mentoring and individual coaching sessions, round table meetings with senior leaders, attendance at FWA events, and, of course, implementing their development plan on - the - job. An Advisory Board of FWA Board and Leadership Council members oversees the strategic direction and implementation of the Pacesetter Program.



Executive Coaches

Executive Coach Leader: Marian Oláh

| | |
|-------------------|-------------------|
| Barbara Abadi | Elizabeth Gambino |
| Meymona Abdi | Jane Maloney |
| Ellen Auster | Irina Nedelchev |
| Gerri Bostick | Marian Oláh |
| Angela E. Durham | Michael Palumbo |
| Godfrey Fandalian | Laura Teich |



FWA Mentors

Group Mentor Leader: Amy Hertenstein

| |
|---------------------|
| Maureen Adolf |
| Ellen Auster |
| Cristina Givlechian |
| Diane Herman |
| Kristin Laktaif |
| Anna Pinedo |
| Annette Stewart |



The Pacesetters met their Mentors at SMBC and their Executive Coaches at MUFG.

Through individual Executive Coaching and Group Mentoring sessions, Pacesetters benefit from the experience, knowledge, and guidance of dynamic leaders from the world's finest financial services and insurance companies, as well as leaders from other industries.

The Pacesetter Nomination Process

Each President's Circle Company is eligible to nominate two Pacesetters every fiscal year. An ideal Pacesetter candidate is one with 7-10 years of professional experience, a track record of increased responsibility and advancement, involvement in the company's women's leadership initiatives and/or other significant community involvement activities, and a passionate desire to grow as a next generation leader. Pacesetters are expected to participate fully in program events. For more information or to obtain a nomination form contact

Pacesetter Co-Chairs:

Kristin Laktaif at
Kristin.laktaif@wellsfargo.com
or
Nefertiti Phipps-Smith at
NPhipps-Smith@us.mufg.jp

President's Circle Members

BMO Capital Markets
BNP Paribas
BNY Mellon
Brighthouse Financial
Citizens Bank
Deloitte
ING
MUFG
New York Life
Prudential/PGIM
Sidley Austin
S&P Global
Stifel
Sumitomo Mitsui Banking Corporation
TD Securities
Wells Fargo Advisors

About the FWA

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FWA of New York, Inc.

212-533.2141

FWAoffice@FWA.org

fwa.org





Program Description and Application



The Financial Women's Association (FWA), in partnership with four sponsoring organizations, BMO Capital Markets, Citizens, MUFG, and New York Life, are excited to announce the relaunch of its innovative, successful Back2Business return-to-work program. This unique program offers all genders an opportunity to restart their careers and transition back to professional life in financial services, after taking a break for reasons such as, but not limited to, providing childcare or eldercare, serving in the armed forces, being in transition prior to or due to the pandemic, or home schooling.

If selected, you may take part in a paid program with one of our participating organizations that can put you on the right track to reach your career goals. You may work on a significant assignment or project that could lead to a permanent position. If your employer has a re-entry program, it will vary in length depending on the project, but is generally between 90 days and 6 months, or longer. Participating companies will discuss specific details with you.

We want to make sure you are successful, so our participating companies are providing training and support to enhance your skills or re-establish certifications.

We understand that a transition back to corporate life can be daunting. Therefore, you will have a mentor who understands the company and can guide you to support you as you return to work, as well as a mentor from the FWA as well.

We want to ensure you have a network to lean on. The FWA will provide chosen participants a one-year paid membership in the FWA so that each participant can attend skill building events, re-build their network, and develop a support group of individuals in the industry.

To get started on your road back to your career, just follow these instructions:

Prerequisites to have your application considered:

- Available to work such hours as the participating organization requires (generally, full-time)
- Away from the workforce in a full-time position, for at least 18 months
- Must have been employed in the financial services industry for at least five years
- Willingness to commit to the length of the assignment and the Back2Business Program
- Employment start dates will be determined with the hiring manager. Candidates are expected to be available and flexible to the requirements of the positions.

To apply, be sure to follow these instructions:

- Complete your application in full
- Upload your resume using the link provided on the application
- Submit your application directly through this website
- Complete and submit your application by 11:59 pm EST, November 12, 2021. Note: Applications received after the deadline will not be considered.
- Applications are final when submitted

If selected to be interviewed by a participating firm, you will be contacted by their representative directly to discuss next steps.



Back2Business 2021 Application

FWA Back2Business Application - 2021

Instructions: In order to be considered for the Back2Business™ Program, please complete all sections and upload your resume.

Application deadline is November 12, 2021 at 11:59 pm EST. Applications received after the deadline will not be considered. Applications submitted to the FWA are final.

Please submit only one application, and note that only your first application will be used.

Reminder: Click "Done" on the last page to complete and submit your application.

CONTACT INFORMATION

* 1. First Name

2. M.I.

* 3. Last Name

* 4. Email Address

* 5. Home Phone Number - *(Use the following format: NNN-NNN-NNNN)*

*** 6. Mobile Phone Number -** *(Use the following format: NNN-NNN-NNNN)*

7. LinkedIn Address - *(Please provide your LinkedIn address.)*

*** 8. Mailing Address -** *(Enter your street address and apartment number.)*

Address

City

State/Province

ZIP/Postal Code

FWA Back2Business Application - 2021

MOST RECENT EMPLOYMENT

* 9. Company/Organization

* 10. Title

* 11. Please enter the start/end dates.

Date From

Date

Date To

Date

* 12. 5 years financial services experience? - *(Please indicate that you have a minimum of 5 years' financial services experience.)*

☐ Yes

☐ No

* **13. Have you been out of the full-time workforce for at least 18 months?**

☐ Yes

☐ No

* **14. Military Service?**

☐ Yes

☐ No

15. If yes, when did you leave active service.

Discharge Date

Date

MM/DD/YYYY



* **16. Job Responsibilities** - *(Please provide a complete description of your last.)*

* **17. Accomplishments** - *(Please provide your accomplishments.)*

*** 18. Soonest available Start Date** - *(Please provide the date available to start the program.)*

Start Date

Date

FWA Back2Business Application - 2021

EDUCATION

* **19. Highest Level of Education** - *(Please enter highest level of completed education.)*

* **20. School Attended**

* **21.**
Graduated

☐ Yes

☐ No

* **22. Major/Minor**

23. Licenses & Certifications - *(Please enter any professional licenses and certifications.*

Enter one per line.)

| |
|--|
| |
|--|

FWA Back2Business Application - 2021

PERSONAL INFORMATION

* 24. Why is this program of interest to you?

* 25. What positions would you consider? - - (Please select all areas of interest.)

- | | |
|---|--|
| <input type="checkbox"/> Accounting | <input type="checkbox"/> Product Management |
| <input type="checkbox"/> Actuarial | <input type="checkbox"/> Project Management |
| <input type="checkbox"/> Capital Markets | <input type="checkbox"/> Real Estate Finance & Corporate Finance |
| <input type="checkbox"/> Corporate & Commercial Banking | <input type="checkbox"/> Risk & Compliance |
| <input type="checkbox"/> Corporate & Investment Banking | <input type="checkbox"/> Sales & Relationship Management |
| <input type="checkbox"/> Global Markets | <input type="checkbox"/> Sales & Trading |
| <input type="checkbox"/> Human Resources | <input type="checkbox"/> Technology & Operations |
| <input type="checkbox"/> Legal | <input type="checkbox"/> Wealth Management |
| <input type="checkbox"/> Marketing | |
| <input type="checkbox"/> Other (please specify) | |

* **26. Interested in travel?** - *(Would you be interested in a re-entry program that includes travel?)*

☐ Yes

☐ No

27. If yes, up to what percent of time?

FWA Back2Business Application - 2021

COMPANY SELECTION

* 28. Please check the companies that interest you.

- ☐ BMO Capital Markets
- ☐ Citizens
- ☐ MUFG
- ☐ New York Life

PERSONAL STATEMENT

Share additional information that you consider relevant to helping Back2Business consider your application.

* 29. Personal Statement

* 30. If hired, would you be able to furnish proof of your eligibility to work in the United States?

- ☐ Yes
- ☐ No

DOCUMENTATION

*** 31. Upload your current resume. PDF is preferred.** - *(If you send your resume as a Word document, use font Times New Roman.)*

Choose File

Choose File

No file chosen

FWA Back2Business Application - 2021

EEO POLICY STATEMENT

The “FWA” and its sponsor companies are equal opportunity employers. All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, national origin, genetics, disability, age, veteran status, or any other characteristic protected by law.

ACKNOWLEDGEMENT AND CONSENT

Back2Business Program events may be filmed, photographed and/or recorded. By participating in the program and attending an event, either online or in person, you acknowledge that all images, photographs and recordings are the property of the FWA of New York, Inc. (the “FWA”). You also authorize the FWA and its designees to use your image, likeness, and voice in connection with any reproduction, distribution, and broadcast (in any medium now known or hereinafter developed) of the event, including footage or recordings produced by third parties and licensed by the FWA. You further authorize the FWA to use the same in its online and offline business communications and marketing.

The FWA may use your contact information to provide you with information about the Program or the organization, itself, or to notify you about events that may be of interest to you. We do not share any contact information with individuals or companies outside of the FWA and the firms sponsoring Back2Business events.

Disclaimer: The FWA is responsible solely for collecting and reviewing applications for the Back2Business Program. Organizations participating in the Back2Business Program will make the final candidate selection decisions.

* 32. Indicate Consent

- ☐ Yes, I consent to the terms
- ☐ No, I do not consent to the terms

PLEASE READ

Proceed to the following page; select "DONE" at the bottom of the page to submit your application.



Back2Business 2021 Application

FWA Back2Business Application - 2021

Thank you

for submitting your application to the Back2Business Program.

If your application is accepted, you will be notified directly by our partnering companies.

Enhance your finance-related internship this summer with **WALL STREET EXCHANGE**

"It was a great program and I am so glad that I got to participate in it, I learned so much about what is valued in finance, how to cater my strengths to finding the job I want, and exposure to others interested in finance."

— Nithi Subbaian,
Cooper Union, Class of 2020

Wall Street Exchange has been helping young women and men navigate the competitive financial job market for almost 40 years.

WSE is not an internship; it is a career development program designed to augment and coincide with your summer internship experience.

Enhance your job search skills, learn about leadership skills, and think strategically about career choices. Participate in nine weekly events that will help strengthen your skills and prepare you to execute a successful full-time job search within finance and other related fields such as technology, engineering, or math.

Participation benefits include:

- * **Enhancing job search skills** through workshops that help you create and leverage your unique professional brand
- * **Developing leadership techniques** and other soft skills necessary to execute a successful job search
- * **Building a professional network** with fellow program participants and interns and employees from sponsor firms

**ACCEPTANCE TO WSE IS COMPETITIVE. APPLICATIONS WILL OPEN IN APRIL 2022.
THE APPLICATION DEADLINE TBA.**

To qualify, you must have completed your junior year of college and have:

- A goal to obtain a paid summer internship with a financial services firm or within a financial function at a non-financial firm
- A minimum cumulative G.P.A. of 3.0 on a 4.0 scale
- An interest in exploring a career in finance or business
- A fully complete application containing all requested information

*Questions? Feel free to email
WSE Co-Chairs Laura Smith
Dunaief (lasd@lasdresourcedevelopment.com) or
Madeline Pacific
(madelinepacific@gmail.com)*

Learn more about WSE at <https://fwa.org/page/wse>. There is no charge to apply or participate in WSE.

Please feel free to direct your questions to Michael Taylor, FWA Educational Programs Manager at: mtaylor@fwa.org

About the FWA

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EDUCATIONAL PROGRAMS

Giving Back to Our Community

The Financial Women's Association (FWA) was established in 1956 to address key needs in the financial workforce by bringing together high achieving professionals from every sector of the financial world. We are dedicated to developing future leaders, enhancing the role of women in business, investing in the community, and increasing the pipeline of diverse candidates. The FWA has contributed to our community by providing scholarships, mentoring programs, financial literacy workshops, and community service activities, reaching over 6,000 individuals over the past 32 years.

High School Mentoring Program

Established in 1986, the FWA high school mentoring program is one of the longest running New York City School partnerships. To date, approximately 800 low-income and middle-income female high school students have participated in the program. FWA mentors provide in-depth, life-changing one-on-one mentoring to low-income and minority high school students in New York City facing various socioeconomic barriers to academic success. The program started at Murry Bergtraum High School for Business Careers (MBHS) and began to transition to the High School of Economics and Finance (HSEF) in 2015. Serving approximately 25 high-potential inner-city girls each year, mentees join the program as sophomores and continue through graduation, focusing on personal and academic development, PSAT and SAT preparation and college preparation. Despite a school wide 89% graduation rate at HSEF in 2019 and an average school-wide graduation rate in New York City of 75.9% in 2018, 100% of FWA mentees have graduated from high school and enrolled in college. Some program highlights include:



- One-on-one mentoring
- SAT and PSAT preparation classes
- Financial aid workshops
- Career guidance
- Overnight college visits
- Community service projects

Beginning in 2018, the FWA High School Mentoring Program is primarily funded by an Equity Through Education Grant from BMO Capital Markets. Additional grants from the Crowell & Moring Foundation, The National Mah Jongg League Foundation and the U.S. Bank Foundation also support the FWA High School Mentoring Program.

Undergraduate College Mentoring Program – Baruch College

Established in 2002, the FWA Baruch College Mentoring Program at Baruch College matches FWA mentors with undergraduate business students, providing one-on-one mentoring focused on career and personal development.



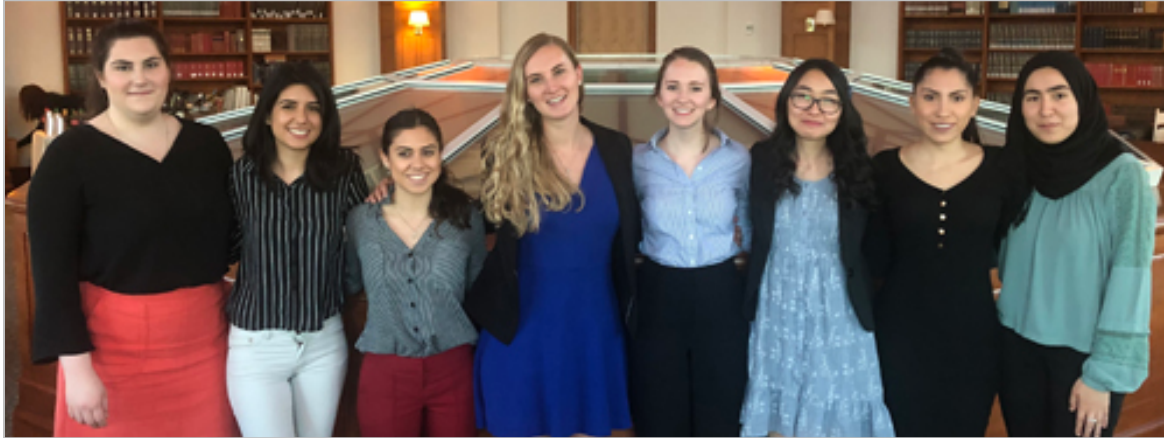
Mentees participate in a variety of programs such as special breakfasts at top companies, workshops on self-promotion and networking, and lunches with speakers who share advice about their successful careers. Students are also exposed to recruitment opportunities at major financial institutions such as BMO Capital Markets and Deloitte LLP. To date, a total of 279 mentees have participated in the program; for the 2018 – 2019 academic year, there were 37 mentees in the program (18 Juniors and 20 Seniors); there will be 40 mentees in the program for the 2019 – 2020 academic year, a new record.

The various components of the program are all funded by BMO as follows:

- **Mentee Awards** – Financial awards made to mentees in their junior and senior years significantly contribute to their financial well-being during college. The FWA provided \$58,500 to fund these mentee awards for the 2018 – 2019 academic year and will provide \$61,500 to fund these mentee awards for the 2019 – 2020 academic year.
- **Study Abroad** – Since 2013, mentees from Baruch have studied abroad with scholarships made possible by FWA's partnership with BMO. During the 2017 – 2018 academic year, 16 students participated in this special opportunity for academic and cultural enrichment, studying in Sydney, Australia; Hong Kong, China; Paris, France; Florence, Italy; Tokyo, Japan; Amman, Jordan; Seoul, Korea; Rabat, Morocco; Amsterdam, Netherlands; and Barcelona, Madrid and Salamanca in Spain. For the 2019 – 2020 academic year, the FWA will again provide \$25,000 to fund stipends for Baruch students to study abroad.
- **Leadership and Professional Development Programs** – Each Spring, several mentees attend leadership conferences at Simmons College in Boston and the University of Maryland at College Park. These conferences provide opportunities for students to learn from intensive workshops, keynote speakers, and networking sessions with peers.
- **FWA Scholars Community Online** – This LinkedIn group engages all past and current students and mentors alike, allowing them to stay connected throughout their career development process and on their professional journeys.

Undergraduate College Mentoring Program – Seton Hall University

Established in 2015, the FWA Mentoring Program at The Stillman School of Business at Seton Hall University matches FWA mentors with undergraduate business students, providing one-on-one mentoring focused on career and personal development.



Mentees participate in a variety of programs such as special breakfasts at top companies, workshops on self-promotion and networking, and lunches with speakers who share advice about their successful careers. Students are also exposed to recruitment opportunities at major financial institutions. For 2018 – 2019, there were 24 mentor/mentee pairs in the Seton Hall mentoring program.

FWA/BMO Capital Markets Scholars Fund at Baruch College

Thanks to significant support from BMO Capital Markets, the FWA endowed a fund to provide needs-based scholarships to students at Baruch College in 2006. Students have been accepted into the FWA mentoring program, have a 3.5+ GPA, intend to or have declared a major in business, have completed or nearly completed core pre-business courses, be a Junior at the start of Fall term, and demonstrate financial need. The minimum award is \$2,000 (*i.e.*, students who have demonstrated financial need will receive at least this amount). There were 6 FWA/BMO Scholarship recipients for the 2018 – 2019 academic year (3 seniors and 3 juniors). Approximately 71 young women have received support through this funding since its inception.

FWA/MUFG Union Bank Undergraduate Scholarships at Seton Hall

Thanks to a generous grant from the MUFG Union Bank Foundation, mentees in the FWA's Stillman School of Business Mentoring and Scholarship Program at Seton Hall University receive merit-based and needs-based scholarships to help them pursue their educational and career goals. Scholarship awards can be used by recipients for tuition, room and board, books and/or any other college expenses deemed appropriate. A minimum GPA of 3.00 must be maintained and financial need will be assessed by the Financial Aid office at Seton Hall.

Scholarships for High School Mentoring Graduates

The FWA awards scholarships to eligible graduates from the FWA High School Mentoring Program to assist with their undergraduate studies. To date, over 250 FWA high school mentees have received over \$750,000 in scholarships sponsored by the BMO Capital Markets Equity Through Education Grant Program. In 2017 – 2018, 20 high school mentees received scholarships; in 2018 – 2019, 23 high school mentees received scholarships.

Graduate School Partnerships

Over the course of 30 years, the FWA awarded more than \$830,000 in MBA scholarships to over 150 students. Although the FWA no longer provides graduate school scholarships, funding has been made available for Graduate School Partnerships since 2013 from BMO Capital Markets for supporting speakers, programs and events. In September of 2016, the Graduate School Partnership organized a conference entitled “Shattering the Glass Ceiling” with 82 attendees.

Wall Street Exchange

In partnership with our President’s Circle companies and other corporations, the FWA’s Wall Street Exchange (WSE) program offers a six-week professional development series to rising college seniors with summer internships in the financial industry in the New York City area.



WSE provides an exciting opportunity for participants to enhance job skills while learning to think strategically about career choices. Since 1975, FWA corporate partners have hosted these workshops and have even hired some of the 1,100+ WSE participants.

Financial Literacy/Financial Backpack Program for Teens



In 2001, the FWA began offering financial literacy workshops to high school students through the Financial Backpack program, where participating students learn practical personal financial skills, such as budgeting, investing, and planning for college. The Financial Backpack Program partners with the Virtual Enterprise International program to provide instruction using our Case Study Curriculum on Financial Goals, Budgeting, College

Financing through workshops held in fall and spring to approximately 100 New York City high school students every year. The Program's Case Study-based curriculum is relevant, realistic, real world, hands-on, and interactive and continues to get great reviews from the students and facilitators.

The FWA Financial Backpack Program also presents workshops at several high schools in the New York City area, including the High School of Economics and Finance and Hunter College High School. The Program works with over 40 FWA and NYC Department of Education (DOE) teacher volunteers.

The Financial Backpack Program has been generously funded over the years by grants from the HSBC Foundation, the Muriel F. Siebert Foundation and the Wells Fargo Foundation.

Microfinance and Impact Investing – Lenore C. Albom Microfinance Giving Program

Former FWA President Lenore Albom understood the power of microfinance in regards to how it can transform women's lives, and her legacy continues through The FWA Lenore C. Albom Microfinance Giving Program. In Lenore's honor, the FWA has raised close to \$100,000 for microfinance organizations – a fitting tribute to a visionary leader who initiated the FWA's involvement in the industry. With the funds raised in Lenore's memory, the FWA has:

- Helped Women's World Banking fund the purchase of a bank in the Dominican Republic.
- Contributed to scholarships received by women leaders of overseas microfinance institutions to attend executive leadership training seminars organized by Women's World Banking and ACCION, a global nonprofit working to empower people who are underserved in the financial services markets.
- Supported the rebuilding of Haiti through Fonkoze, USA, a nonprofit whose mission is to provide the financial and development services to empower Haitians – primarily women- to lift their families out of poverty.
- Supported the Cherie Blair Foundation for Women's Enterprise Development Programme whose aim is to empower women entrepreneurs in developing and emerging economies.
- Funded a Micro Credit Village Bank in Haiti to make microfinance loans to impoverished women to start small enterprises.

Educational Programs for the General Business Community

Programs focused on education and professional development are designed to provide continued learning and career growth to all members and guests of the FWA. A variety of events are sponsored throughout the year by several committees, including Professional Development, Not-for-Profit, Entrepreneurs, and Impact Investing.

Revised: September 2019

FWA COMMITTEES

Annual Summit

Plans the premier fundraiser to support educational programs, the Annual Summit provides a half to full-day of events centered around a contemporary theme. For 2020, accelerating the leadership and success of women across the financial community in all industries is the theme for the summit that is scheduled in the Spring.

Awards Ceremony/Reception

Plans a major fundraiser to support educational program, the Awards Ceremony/Reception honoring women leaders in the public and private sector today and provides support for students who will make their mark in the years to come.

Back2Business™

Making its debut in 2016, the Back2Business initiative in a collaboration with participating companies provides a unique opportunity program for individuals who have interrupted their careers in financial services to be participate in a paid internship.

Directorships and Corporate Governance

Educates members on corporate governance and the issues involved in serving on corporate boards.

Emerging Leaders

Creates a forum for talented professionals to continue development of their professional and personal skills by leveraging the knowledge base of colleagues and mentors.

Entrepreneurs

Develops and delivers business programs targeted to our entrepreneurial membership.

Financial Literacy – Financial Backpack Program for High School Students

Develops programs where participating students learn practical personal financial skills, such as budgeting, investing, and planning for college

FinTech

Develops and shares programs on technology subjects of interest to those in financial services.

FWA - Long Island (Regional)

To provide a forum to network with peers in the financial community on Long Island.

FWA - New Jersey (Regional)

Organizes a variety of FWA programs conveniently located for those who live or work in New Jersey.

FWA – Westchester/Southern Connecticut (WestCon) (Regional)

To provide a forum to network with peers in the financial community in Westchester and Southern Connecticut.

Global Agenda

Hosting events focused on hot financial topics, the Global Agenda Committee brings together next generation thought leaders from financial institutions, corporations, research and academia.

International Business Conference Sub-Committee

Manages the International Business Conference (IBC) and organizes related programs on international issues. The 2021 destination for the IBC is Amsterdam, The Hague and Rotterdam, Netherlands.

Graduate School Partnerships

Offers an opportunity for graduate level students in the NY Metro area to jump-start their professional careers through a series of on-campus workshops on professional skills training and leadership development.

Holiday Benefit

Organizes the holiday fund-raising event to support the FWA educational programs.

Impact Investing

Develops programs and other activities related to microfinance topics.

Strategic Marketing Communications

Build brand awareness of the FWA; raise the FWA profile to enhance the value of the organization to the membership, corporate sponsors, and the charitable donors. Also ensure Committee chairs/members are empowered to effectively promote their events through training, advising, marketing tools and other tangible support.

Member2Member Mentoring

Making its debut in 2017, the Member-to-Member committee is working on defining and implementing a mentoring program for seasoned professional and prospective mentees.

Membership & Engagement

Recommends membership policies and oversees member development, selection and integration. Organizes recruiting events, including on-site corporate events.

Men's Alliance

Through our ongoing discussions and events, we: encourage men and women members and guests of the Financial Women's Association to learn to work more effectively with each other in business; engage men and women in advancing their respective careers; and solicit specific input from men on the advancement of women.

Mentoring – Baruch College

Started in 2002, the Baruch program (approximately 25-30 pairs in the program primarily juniors and seniors of diverse backgrounds and first generation to college) offers a generous scholarship to deserving mentees.

Mentoring – High School – The High School of Economics and Finance (NYC)

The mentoring program powered by the FWA assists mentees to smoothly transition into long, successful careers after gaining the knowledge and leaving with the tools provided by experienced women part of this organization.

Mentoring – New Jersey Regional – Seton Hall University

Making its debut in 2015, the New Jersey Regional Mentoring Committee is working with mentees within the New Jersey regional area to provide them the knowledge needed to succeed on their career path.

Pacesetters

Started in 2015, the FWA is honored to provide a Program of Leadership and Development for these outstanding individuals through a series of specially-tailored Pacesetter events each year.

Undergraduate Scholarships

Oversees the funding, selection process and awarding of FWA's scholarships to High School for their undergraduate college studies.

Wall Street Exchange

Organizes programs to encourage women in college to seek careers in the financial field, including Wall Street Exchange summer program.

Revised: November 2021

SHAPE THE FUTURE AS AN FWA MENTOR

The FWA invites you to become a mentor for one of its three FWA one-to-one mentoring programs, one high school, one at a public college, one at a private college. Mentees are young women headed for business careers.



FINANCIAL WOMEN'S ASSOCIATION

Advancing All Women
in the Financial Community

Mentoring a student can be the most powerful influence on her professional future. FWA mentors are paired with talented young women, economically, culturally, and ethnically diverse, to help define their dreams – and discover the ways and means to achieve them.

FWA Mentoring Programs

- High School of Economics and Finance
- Baruch College
- Seton Hall University

How You Benefit

Impact

Help a talented young woman to succeed in the unfamiliar corporate world, by sharing your experience

Learning

Learn about your mentee's culture, life experience and tech/social media wizardry

Flexibility

You and your mentee set your schedule and ways of communicating within our "connect regularly" guideline

Friendship

Many of our mentors and mentees develop long-term relationships



"Being a mentor is an incredible opportunity and the FWA creates the perfect program for professionals to engage in mentoring. I am able to give back to others who value my experience." - FWA Mentor

**To learn more about
becoming a mentor contact:**

Michael Taylor
FWA Associate Director of Educational Programs

mtaylor@fwa.org



"Being a mentor is an incredible opportunity and the FWA creates the perfect program for professionals to engage in mentoring. I am able to give back to others who value my experience."

Annette Stewart, FWA Mentor



Mentor Peggy Decker with Mentee alumna Anastasia Sagalovitch '09, currently a SMBC employee.



FINANCIAL WOMEN'S ASSOCIATION

Advancing All Women
in the Financial Community

The FWA, bringing
high-achieving
professionals together
from every sector of
the financial world.



"This experience has made me a stronger and more well-rounded individual. The fact that I have champions, pushes me to work that much harder to exceed my expectations and goals day by day. Your contribution has made such an indescribable difference in my life. One day, I hope to be in a position where I can give back to the community, just as you have done."

Vivian Chen, Baruch College, 2019, Major: Finance and Investments



"My mentor has challenged me to be comfortable being uncomfortable. She serves as a guide, friend and support system through my development."

Carmen Guan, Baruch College, 2019, Major: Accountancy



"I have been paired with the best mentor for me. I can look far ahead into my future because [of your] scholarship. I am able to grow professionally so I can help others."

Danielle Douglas, Baruch College, 2019, Major: Finance and Investment

Mentoring the Future

FWA scholarships, financial literacy workshops, community service activities — and mentoring programs — have benefitted nearly 6,000 individuals over the past 30 years.

men•tor:

noun 1. an experienced and trusted adviser.
verb 1. advise or train (someone, especially a younger colleague).



FINANCIAL WOMEN'S ASSOCIATION
Advancing All Women
in the Financial Community

Financial Women's
Association of
New York

t: 212-533-2141
e: fwaoffice@fwa.org

fwa.org

Interested in Mentoring?

Be a key source of knowledge to a young woman seeking guidance with developing her career.



"I appreciate being in a position to share some of the career knowledge I've obtained over the years with such deserving future women leaders."

Marline Alexander
FWA Mentor



"The advice shared, and lessons learned, have empowered and taught me to keep moving forward despite any hardships or obstacles. There are so many opportunities to meet inspiring women and take in all their wisdom and guidance. The FWA program has left a lifelong impact on my life."

Kiwing Lok,
Baruch College,
Bachelors 2017,
Masters 2018

The FWA High School Mentoring Program is funded in part through grants from the Crowell & Moring Foundation and The National Mah Jongg League Foundation. Scholarships are funded through the BMO Capital Markets Equity Through Education program.



"I have been privileged to be a mentor to a wonderful and talented individual. Participating has given me a keen awareness of the immense value of the program and the life-changing effect it has."

Katrin Dambrot, FWA President 2015-2017



After becoming a mother at 15 and living in a homeless shelter as a high school freshman, Isis Patterson is in the support of her FWA mentor, Beth Dorfman, turned her life around. Today, Isis is a public policy student in Endicott College's "Keys to Degrees: Educating Two Generations Together" program for student parent.

Isis Patterson, Murry Bergtraum High School, 2015. Endicott College, 2019

Mentoring a student can be the most powerful influence on her professional future. FWA mentors help economically, culturally, and ethnically diverse high school and undergraduate college students define their dreams – and discover the ways and means to achieve them. FWA mentees experience new and different educational and career opportunities. They're provided advice and support in academic and professional areas and are encouraged to increase their cultural awareness. The FWA's one-on-one mentoring program is recognized as a model program by Harvard University.

High School Mentoring Program

The FWA High School Mentoring Program, established in 1986, is one of the longest-running New York City School partnerships to mentor low-income and minority high school students in NYC. Begun at Murry Bergtraum High School for Business Careers (MBHS), the program transitioned to the High School of Economics and Finance (HSEF) in 2015. About 30 girls join each year as sophomores and continue through graduation. They're provided with: One-on-one mentoring, career discussions, college search and application support, community service opportunities, financial aid workshops, overnight college visits, SAT and PSAT preparation classes, social and cultural opportunities, weekly academic and personal advancement support, and more.

Undergraduate College Mentoring Program

FWA's Undergraduate College Mentoring Programs at Baruch College and the Stillman School of Business at Seton Hall University mentor undergraduate business students. Activities include visits to top companies, workshops on self-promotion and networking, lunches with professionals who share advice about their successful careers, and recruitment opportunities at major financial institutions.

FWA Baruch College Mentoring Program

Each year since 2002, 30 or more mentees benefit from transformative values as well as an easing of their financial burden while preparing for careers. Mentee Awards provide financial support in junior and senior years. Study Abroad opportunities provide academic and cultural enrichment.

Mentees may also attend leadership conferences and pursue recruitment opportunities. At the Stillman School of Business at Seton Hall University, the recently-formed

FWA Undergraduate Mentor Program continues to grow. Fifteen participants participated in 2016–17.

Graduates of the program land jobs at top firms around the country, including Amazon, Facebook, Goldman Sachs, Google, JPMorganChase, Morgan Stanley, and BMO Capital Markets.

With the program over a decade old, the family of FWA alumnae continues to grow. Former mentees are becoming leaders in the FWA and in their community.

FWA Member2Member Program

The program supports the FWA mission of accelerating the leadership and success of women in the financial community by pairing experienced FWA members with members looking to advance their careers and build leadership skills.

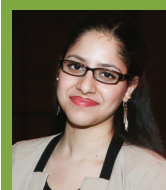
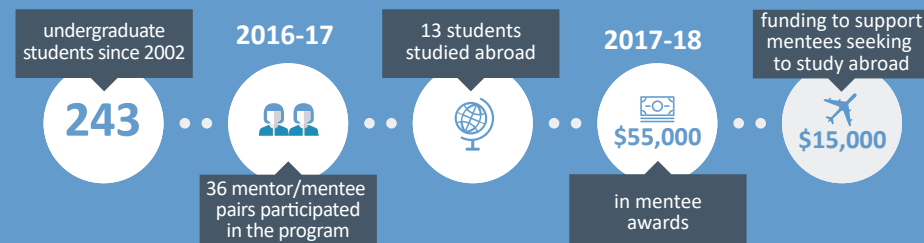
"The FWA Mentee Program has helped me to make immense strides in my professional development and has provided me with a fantastic support network of equally ambitious and driven young women."

Layanah Nsouli, Baruch College, 2018, Major: Finance and Investments



"The FWA's mentoring program extends far beyond any event or experience. They don't just mentor young ladies into college; they prepare future women executives."

Jasmine N. Mangum, Murry Bergtraum High School For Business Careers, Class of 2012



"My Mentor... taught me what an authentic mentor looks like and how to make a meaningful impact in someone's life as a teacher, advocate, and friend."

Salma Mohamed, Baruch College, Bachelors 2016



"Your programs have allowed me to develop valuable professional skills."

Christina Certa, Baruch College, 2019, Major: Accountancy

800 low-income and middle-income female high school students have participated as FWA mentees.

100% of all FWA high school mentees have graduated on time and enrolled in college — considerably better than the average school-wide graduation rate in New York City of 74.3% (2017).

250 graduates of the FWA High School Mentoring Program received more than \$750,000 in scholarships to assist with their undergraduate college studies.*

2016 five mentees were inducted into the National Honor Society, several were student athletes, and one was HSEF Class President. SAT scores were the highest in program history.



In Good COMPANY

BY LYNTHIA ROMNEY

Women Are the Competitive Advantage in the Age of Disruption

If there is one topic of agreement among today's business leaders, it is that continual innovation is required to meet the challenges of a disruptive marketplace.

Successful competitors also know there is a powerful force to achieve that imperative — and that is a dynamic pipeline of women.

Research shows that women in leadership positions enrich a company's profitability. The "Is Gender Diversity Profitable? Evidence from a Global Study," conducted by the Peterson Institute for International Economics and EY, revealed that an organization with 30% female leaders — in the C-suite or on boards — could add up to 6 percentage points to its net revenue margin. For profitable firms, a move from no female leaders to 30% representation is associated with a 15% increase.

How can corporations leverage women as vital contributors to their success? Visionary organizations advance a multitude of

strategies to support diversity of thought and candid communication.

Catherine Verhoff, Chief Diversity Officer at PGIM, the Global Investment Management Business of Prudential, with over \$1 trillion in assets under management and offices in 16 countries, calls for men and women to collectively own the goal of female advancement.

"At the heart of a successful women's leadership strategy is an environment where women can advocate for their ideas and at the same time get honest feedback. Men are key allies in creating this culture," she says.

To further PGIM's robust diversity and inclusion strategy, Verhoff has assembled a senior-level think tank of top executives from PGIM's eight businesses. These decision makers champion recruitment, development, retention and promotion of diverse talent at PGIM. "Given their personal engagement and influence, the think tank has the potential to be a real game-changer," Verhoff says.

"Bringing men and women's leadership traits to the table — including the agility and relationship-building strengths we know women possess — is a win-win."

**—Stacy Musi,
FWA President,
2017-18**



FINANCIAL WOMEN'S ASSOCIATION

CELEBRATING 60 YEARS

Blazing a Trail to the Top

For women in finance across industry sectors, the Financial Women's Association (FWA) of New York fuels these ambitions with a mission and track record in accelerating women's leadership. Founded in 1956 by eight female pioneers on Wall Street, the FWA today offers its 1,000 members a rich array of peer mentoring and professional development programs to enhance the prospects for women throughout the career continuum.

The FWA illustrates the collaborative leadership considered vital in today's fast-changing marketplace. Its signature President's Circle of corporate partners creates a forum for thought leadership on diversity best practices. The FWA counts men among its members — including prominent leaders of the President's Circle — and encourages their involvement throughout its programs, as with its Men's Alliance Committee.

Bringing Men and Women Together

"Today's corporations must be able to innovate quickly and communicate authentically. Bringing men and women's leadership traits to the table — including the agility and relationship-building strengths we know women possess — is a win-win," says FWA President Stacy Musi, whose 2017-2018 theme for the FWA of engagement drives this point home. "When men and women work together in an integrated way, the combination brings out the best



of each and creates a more powerful outcome than either can achieve alone."

A global survey on gender diversity by Grant Thornton suggests how businesses can prepare for transformation in the current business environment: "They need to be able to anticipate change, understand potential future risks, and develop solutions to overcome them and grow. This requires input from diverse perspectives. Firms need more women in senior leadership roles to facilitate this."

Keeping the Pipeline Full

To fill the pipeline, FWA developed its standout Pacesetter Program in which President's Circle members select female executives to gain yearlong access to senior leaders, skill building and

networking. The FWA is also launching a new series of professional development coaching workshops and a Member-to-Member Mentoring program.

"For over 60 years, the FWA has demonstrated the power of a strategic, professional network in advancing women's success," says Lily Klebanoff Blake, Past President, FWA, and Co-Chair, FWA Alliances. "At a time when women are a crucial part of the talent pool and drivers of business growth, the FWA has never been more relevant to women and the corporate community."

PGIM's Diversity & Inclusion initiative utilizes its Women's Advisory Council to develop that talent. Composed of two senior-level women from each business, the Council develops a vibrant range of programs to encourage women's self-awareness and advancement. Among these is a 250-attendee conference providing personalized assessments in leadership, and sessions on engaging male allies.

These interrelated strategies create a culture of engagement so vital in the age of disruption. For corporations seeking to bring the full strengths of their workforce to bear on an uncertain future, women leaders are the competitive advantage. ●

Lynthia Romney is president of RomneyCom, a full-service communications firm positioning major corporations and national nonprofits for leadership visibility through powerful messaging and platforms of media, authored content and speaking opportunities. Visit her at romneycom.com.

PGIM

PGIM IS DRIVING A BUSINESS-WIDE DIVERSITY AND INCLUSION strategy that tries to engage all executives in women's success. The Women's Initiatives, organized by the Women's Advisory Council, deliver actionable professional development guided by candid input from PGIM women. "Strategies for Success" luncheons tackle the hard and soft skills women need to advance, such as "Closing the Confidence Gap" and "Demystifying Quant." One session for working mothers sold out in two minutes. "The response has been overwhelmingly positive," said Susan Courtney, Managing Director, PGIM Fixed Income.

Externally, the Council participates in the FWA Pacesetter Program for high-potential women. "There comes a time in every woman's life when the move forward seems impossible. The Pacesetter Program equips, encourages and supports women to move boldly on, and bring a sister with her," said Jamila Houser, Principal, PGIM Real Estate Finance.

Listening to and addressing women's specific career needs is filling the pipeline at PGIM.




David Hunt, President and CEO of PGIM, with Jamila Houser, PGIM's 2016 FWA Pacesetter, and Alison Hallberg, PGIM's 2016 Rising Star



PGIM

The Global Investment Management
Businesses of Prudential Financial, Inc.

A FOCUS ON TALENT.



At PGIM, people have always been our most valuable asset. We believe that having diverse perspectives is a competitive advantage.

With our talent identification programs and leadership development strategies, PGIM strives to give employees opportunities to grow their careers and acquire the skills they need to succeed.

Follow us on LinkedIn or learn more about our talent initiatives at pgim.com/careers.



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PRESIDENT'S MESSAGE

I Have an IDEA

July 20, 2021

"It's a new dawn; It's a new day; It's a new life!" – *Nina Simone*

Greetings my fellow FWA members, friends, and colleagues across the financial world! My name is Nina Batson and it's truly a privilege to be the Financial Women's Association's 58th President. It is also an extreme honor to be the FWA's first African-American President!

For those that missed the FWA's Annual Meeting of Members on June 21st, I've chosen to devote my July presidential letter as a recap of some of the points discussed that glorious evening and a look towards the FWA's future.



Hermina "Nina" Batson
FWA President 2021-2023

Where we've been:

As Simone Vinocour, the immediate past FWA president mentioned in her speech before she passed the gavel to me, there were a lot of strategic initiatives that were undertaken over the last 3 years. Thank you, Karen Elinski, FWA president 2018~2019, and all of the previous FWA presidents for your tireless efforts to make this organization what it is today! As we all know, it takes a village and the FWA couldn't have accomplished all that it has without the support of its Board, Leadership Council, President Circle corporate sponsors, and YOU!

Over the last year, the "NinaSimone" show (as we liked to call ourselves) ensured that the FWA had weekly programming whenever possible. There were more than 60 virtual events that occurred, the vast majority of which were recorded. Feel free to listen to the FWA's very first podcast which kicked off the organization's virtual presence on International Women's Day in 2020. Missed one or more virtual events? Interested in rewatching those that you've already attended? Then visit the FWA's website, [FWA Store](#). These events will serve as both an inspiration and as educational support during these unprecedented times that we're all still experiencing. Enjoy!

Where we are, the power of the FWA, and it's programming:

With a rich history since 1956, over 800 members and numerous corporate, government, and academic allies, the FWA is ideally positioned to address the challenges facing women today as well as to help realize a world in which there is

equitable representation and recognition across all levels of the financial community.

With six months of the year behind us, we should all try to slow down during the months of July and August - even if just for a few days. As we listen to the birds chirp each dawn, realize it's a new day affording us the ability to refresh, regroup, re-engage, reconnect with friends and family, and reset. Treat each day as a new beginning!

The FWA does the same thing. During each FWA fiscal year which covers July 1st through June 30th, the FWA's leadership team is planning and strategizing more great events and amazing educational opportunities based on the current and global financial services environment while incorporating the responses we've received from you (both verbally and via surveys) after our interactive events. For example, to kick off this summer, the FWA's NJ committee hosted alfresco dining experiences over two different nights. It was just what was needed - to venture out to several restaurants located in Northern New Jersey and enjoy various cuisines. This committee also has a book club so if you're looking to network and meet new people, are an avid reader already, or desire to start a new hobby - read a book with the FWA!

Though we're keeping our programming light for now, please note the following upcoming FWA events:

[August 2nd](#): *Health & Good Nutrition: What Am I Eating?*

August 10th: *Transform Your Mindset (registration coming soon)*

[August 12th](#): *Get in the Game: Join the FWA Long Island Committee's 10th Annual Golf Outing*

With our eyes on our future leaders, the FWA's Wall Street Exchange program commenced on June 30th with 73 participants representing 19 firms and 48 schools. For those that are unaware of this amazing program, the [FWA's Wall Street Exchange](#) is a career development program designed to augment the summer internship experience of select qualified rising college seniors. The program consists of a series of weekly events (8 weeks) hosted by top financial services firms and focuses on professional and personal development. Know of someone that missed this year's opportunity, don't worry we'll be in touch in approximately 9 months with next summer's!

In addition, the FWA's Pacesetters program will be commencing on July 28th. The [FWA's Pacesetter Program](#) is a continuing partnership with FWA President's Circle sponsorship corporations that recognizes outstanding women who exemplify the character, achievement, passion, and leadership that is critical to the organizational success and to the support and development of the next generation of women leaders within those firms. If you're an FWA President Circle company and missed signing up promising and promotable women with a minimum of 7-10 years of professional experience within your firm, have no fear this program will be back next

year!

And to our FWA Members, be on the lookout for messaging coming soon inviting you to become a mentor across one of the FWA's various educational initiatives (e.g., at the High School of Economics and Finance, Seton Hall University's Stillman School of Business, Baruch College, Financial Backpack/Literacy, Back2Business, etc.) as well as the opportunity to join the FWA's Member2Member program, a peer-to-peer member benefit. Giving back is so rewarding and as mentors you will get trained – the FWA way!

Where we're going:

The FWA is a community of lifelong learners and as such will continue to engage and connect - members and non-members alike - providing a supportive community that recognizes all contributions while fostering collaboration and accountability. I know that as women supported by our male allies, we will continue to break barriers and shatter glass ceilings to bring about a more equitable workplace and environment. Thus, I have an **IDEA** which will be my underlying theme during my two-years of presidency. My IDEA (**I**nclusion, **D**iversity, **E**quity and **A**ccess) will be woven into this year's programming and experiences. Why, because with inclusion, comes diversity – diversity of thought and diversity of experiences (just to name a few).

As unwavering champions empowering our members and organizations to achieve inclusive, equitable representation at all levels for women in finance, the FWA will continue to promote the professional development and advancement of all women through education, mentorship, scholarships, networking, and alliances across the financial community. I'm asking each of you, my fellow talented professionals, to help the FWA so that it can continue its goal of advancing leadership growth and accelerating the success of all women in the financial community. It starts with access! Not a member, join! If you are a member, join a committee, the lifeblood of the organization! Connected to professional, distinguished speakers that you would like to see showcased via the FWA? Send your impactful and creative ideas to the [FWA office](#). We look forward to hearing from you. Most important, feel free to donate to this illustrious organization, become a [President Circle corporate sponsor](#), and/or sponsor the membership of the next generation or a fellow colleague. No amount is too small - [Donate Now!](#)

In closing, as the world re-opens, the next step in the FWA's evolution is to navigate with you through the hybrid experience which I like to call the "new normal 2.5". As we continue to step out into society, I promise "sprinkles" of in-person events, fun networking opportunities, content driven collaborations, and so much more. I also promise that we will celebrate in person sometime in 2022 and that we will resume an international business conference – all whenever it's deemed safe for us to do so. For now, the FWA will remain vigilant and continue to provide virtual programming. Let me reiterate that I'm so very proud to be serving as FWA President during its 65th anniversary as an organization, its 30th anniversary of providing amazing educational

initiatives programming, and during the 20th anniversary of the FWA's Baruch College partnership. I wholeheartedly believe in this organization and look forward to seeing as many of you as possible at future FWA events.

Onward and Upward!



Hermina "Nina" Batson
FWA President 2021-2023

FWA connects a vibrant community of dynamic financial professionals and proactive institutions focused on development and empowerment to **advance leadership growth and accelerate the success of all women in finance.**

[Join the FWA](#)[Event Calendar](#)[Donate](#)[Contact Us](#)

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Wall Street Women Celebrate Milestone



The Financial Women's Association Marks 60 Years of Leadership in Advancing Women on Wall Street

President Katrin Dambrot and other leaders of the Financial Women's Association ring the Nasdaq closing bell to mark the organization's 60th anniversary in 2016.

By Kimberly Weinrick and Ria Davis

THE FINANCIAL WORLD IS EVOLVING and becoming more diverse—from the Buttonwood Agreement of 1792 when a group of men formed the beginnings of the New York Stock Exchange, to the “Rosie the Riveter” era when women worked at the Exchange while men fought overseas, to the present with many women in C-Suite and other senior leadership roles—there has been tremendous progress in the industry. However, there is still much more to achieve.

Many financial services firms are committed to increasing diversity across their organizations, in particular by fostering more opportunities for women. The Financial Women's Association (FWA), which marks its 60th anniversary in 2016, aims to accelerate the leadership and success of women across the financial community and in all sectors of the industry, by fostering alliances and preparing the current and next generation of professionals. The FWA is a forum for Wall Street women to network and advance their individual careers, and it offers its members leadership opportunities and the chance to mentor and share their experiences and best practices with young women and students.

To fully appreciate what eight enterprising women achieved when they launched the FWA, it is important to remember the historical and cultural context six decades ago. In 1956, the Dow Jones Industrial Average marked a new high, reaching the 500s; Dwight D. Eisenhower was President of the United States; and the first transatlantic telephone cable, from Newfoundland to Scotland, went into operation.

In the midst of this progress, the founders of the FWA, having been denied admission to the Young Men's Investment Association, decided to form the Young Women's Investment Association (now the FWA) as a forum to share their experiences and advance their knowledge and careers.

The founding members were primarily security analysts, which was the first professional role open to women on Wall Street. Soon the organization grew to include female bankers, brokers, traders, management consultants, financial analysts, portfolio managers, economists, lawyers and more. The one surviving founder, Joan Williams Farr, remains fully supportive of the organization.

As Wall Street has evolved and endured through multiple recessions, major changes in the industry and seismic advances in the role and importance of technology, the



Early photograph of Joan Williams Farr, a founder of the FWA, who remains actively involved in the organization.

FWA has evolved as well. Through the decades, the FWA expanded its membership by, among other things, opening membership to men to allow everyone the benefits of sharing best practices and lessons learned.

The organization that served as a beacon for the few women on Wall Street in the 1950s continued through the 1960s as a forum for building on shared experiences, while expanding its scope to bring outside speakers to help members hone their craft and advance the profession. The mission broadened even further in the 1970s, as the FWA committed to supporting the next generation through scholarships and mentoring.

"One striking strength of the FWA was its ability to provide its members with not only some of the resources necessary to learn to maneuver on Wall Street, but also to provide a female space for the women to meet one another and build important ties and friendships with one another."

—Dr. Melissa S. Fisher, Visiting Assistant Professor in the Department of Social and Cultural Analysis at NYU, and author of *Wall Street Women*

Today, the FWA's initiatives are even more multi-faceted, with more than 50 programs hosted annually. It has awarded more than 150 scholarships and has taught financial skills to nearly 3,000 high school students. It has also provided professional development and mentorship opportunities to thousands of students and young professionals.

Through its outside speaker programs, members and guests have benefited by hearing from and engaging with industry leaders, including Jamie Dimon and Marianne Lake of JPMorgan Chase; Steven Kandarian and Marlene Debel of MetLife; and the late Muriel ("Mickie") Siebert, the first woman NYSE member, who was also an FWA member, supporter and FWA 1994 Private Sector Woman of the Year.

The FWA has also been in the forefront of sending delegations around the world. It was one of the first US groups to visit China in 1977; the delegation of 25 women led the way for an international conference program that continues to this day. Other notable FWA international conferences have included a delegation to South Africa following the fall of apartheid in 1996, Costa Rica in 2010 with new green and micro-financing options and Germany in 2014, 25 years after the fall of the Berlin Wall. Over the years, FWA International Delegation participants have met with sitting presidents, royalty and business leaders in nearly 30 countries and on six continents, some with returning delegations and follow-up meetings and dialogues on best practices.

Of course, none of this happened overnight. In her book *Wall Street Women* (Duke University Press, 2012), Dr. Melissa S. Fisher chronicles the stories of FWA members and other trailblazers, and notes that:

It has become a common understanding that women in the corporate world, particularly during the seventies, were lone pioneers, token women. There were, in fact, very few professional women in each firm at that time: there



WOMEN'S EQUALITY DAY, 1995

By the President of the United States of America

A Proclamation

Seventy-five years ago this Nation took a great step forward by ratifying the 19th Amendment to the Constitution. Twenty-eight simple words — "The right of citizens of the United States to vote shall not be denied or abridged by the United States or by any State on account of sex" — brought to a triumphant conclusion the long decades of struggle waged by generations of suffragists. Looking back from the vantage point of the present, when the contributions and influence of women enrich every facet of our national life, it seems remarkable that as recently as 1920 most American women were still denied their right to full participation in the political activity of this country. Our history continues to remind us that humanity's age-old enemies of ignorance and prejudice are not easily defeated.

But defeated they were, by an army of women and men who, inspired by the staunch courage and unwavering commitment of leaders like Susan B. Anthony, changed people's minds and the course of U.S. history. Using the classic tools of democracy — assembly and petition, exhortation and example, peaceful protest and political shrewdness — these champions of liberty won a lasting victory for civil rights. The fight was hard, the margins slim, and the outcome often in doubt. But after years of effort and sacrifice, after countless acts of courage and conscience, advocates of women's suffrage rejoiced as the Congress proposed an amendment to the Constitution in 1919 and as Tennessee, the last State needed for ratification, approved that amendment on August 18, 1920, by a single vote, when a young legislator heeded his mother's plea to support suffrage. On August 26, 1920, the 19th Amendment was finally proclaimed part of the United States Constitution, fulfilling Susan B. Anthony's pledge that "failure is impossible."

Women's Equality Day, while a fitting occasion to commemorate this great victory of wisdom over ignorance, is also a time for sober reflection that American democracy is a work in progress. The Declaration of Independence was only the first step in our long journey toward equality for all Americans. And while we have made much progress, until all women have an equal opportunity to develop their full potential and to make contributions that are accepted and welcomed by our society, our freedom as a Nation will be incomplete.

Let us observe Women's Equality Day, then, both as a celebration of past achievement and a promise for the future: a promise to promote and protect with vigor and vigilance the rights of all our citizens; a promise to decry the policies of exclusion and to pursue the ideal of equality for every American; and a promise to empower all of our people to take their rightful place as full and equal partners in the great American enterprise.

NOW, THEREFORE, I, WILLIAM J. CLINTON, President of the United States of America, by virtue of the authority vested in me by the Constitution and laws of the United States, do hereby proclaim August 26, 1995, as "Women's Equality Day." I call upon the citizens of our great Nation to observe this day with appropriate programs and activities.

IN WITNESS WHEREOF, I have hereunto set my hand this sixteenth day of August, in the year of our Lord nineteen hundred and ninety-five, and of the Independence of the United States of America the two hundred and twentieth.

William J. Clinton

were only a few hundred on all of Wall Street at the very most. But their isolation actually forced them to seek out other women (like themselves) by attending FWA meetings and in some cases becoming active members of the FWA board. One striking strength of the FWA was its ability to provide its members with not only some of the resources necessary to learn to maneuver on Wall Street, but also to provide a female space for the women to meet one another and build important ties and friendships with one another. This domain was attached to but separate from Wall Street firms. Regularly attending meetings, and forging ties of mutual understanding, they fostered deep friendships that provided emotional support as they dealt with difficult male bosses, for example. This does not mean that the women did not at times compete with one another or even like one another. But to ignore the role of female networks and friendships in the history of Wall Street women's advancement is to obscure the meaning and impact of all female ties on women's careers in finance.

Looking forward, the FWA continues to be a leading partner in professional women's success, dedicated to enhancing the role of women in finance and investing in the community, showcasing outstanding role models and mentoring and inspiring the pipeline of tomorrow's talent. \$

Kimberly Weinrick is Head of Public Affairs for OppenheimerFunds, a global asset manager. She is past president of the FWA (2013–2014) and actively serves on its Board of Directors. Ria Davis is General Counsel and Chief Compliance Officer of Semper Capital Management, L.P., an independent investment firm specializing in residential and commercial mortgage-backed securities. She has been a member of the FWA since 2002 and is currently FWA president-elect (2017–2019).

Proclamation signed by President Bill Clinton declaring Women's Equality Day, August 16, 1995.

DISTINGUISHED SPEAKERS

Sharon Allen

Chairman
Deloitte LLP

Jamie Dimon

Chairman and CEO
JPMorgan Chase & Co.

Maria Bartiromo

CNBC Wall Street Correspondent
and Anchor

Robert Doll

Chief Equity Strategist
of BlackRock

Sharon Y. Bowen

Commissioner of the U. S. Commodity
Futures Trading Commission (CFTC)

Ami Domini

Partner of the Sustainability Group

Beth Brooke

Global Vice Chair of Ernst & Young

Michael B. Donley

Secretary of the Air Force Washington, D.C.

Anna Escobedo Cabral

U.S. Treasurer

Irene Dörner

Global Managing Director, President and CEO
HSBC, USA

Collen Campbell

Vice Chair of BMO Capital Markets

Richard Edelman

President and CEO of Edelman

Hillary Clinton

United States Senator of the State of New York

Mohamed El-Erian

CEO of PIMCO

Erin Conaton

The Undersecretary of the Air Force

Cathy Engelbert

CEO of Deloitte LLP

Jim Copeland

CEO of Deloitte & Touche, LLP

Roger Ferguson

CEO of TIAA-CREF

Kathleen Corbet

President of Standard & Poor's

Daria Foster

Managing Partner of Lord Abbett

Helima Croft

Global Head of Commodity Strategy
and MENA Research
RBC Capital Markets

Vicki L. Fuller

Chief Information Officer
New York State Common Retirement Fund

Christine Cumming

First Vice President and COO of the
Federal Reserve Bank of New York

Tom Glozier

CEO
Reuters

Robert Greifeld
CEO of The NASDAQ OMX Group, Inc.

Lynn Martin
Former U.S. Secretary of Labor

Ambassador Karen Hughes
Vice Chair
Burson-Marsteller

Ted Mathas
Chairman of the Board, President and CEO
New York Life Co.

Deborah Lee James
23rd Secretary of the Air Force

Carter McClelland
Chairman of Banc of America Securities, LLC

Barbara Jones
First Woman Consul General of Ireland

Leo Melamed
Chairman Emeritus
of CME Group

Alan B. Krueger
Chair, White House Council
of Economic Advisers

General Mary Ann Miller
Commander, Air Mobility Command
Scott Air Force Base, Illinois

Liz Krueger
New York State Senator (D-WF)
28th Senate District

Denise Morrison
President & CEO
Campbell Soup Company

Marianne Lake
Chief Financial Officer
JPMorgan Chase & Co.

Anne Mulcahy
CEO
Xerox

Jessica Lappin
New York City Council
District 5 – Council Member - Democrat

Kathy Murphy
President Personal Investing
Fidelity Investments

Reynold Levy
President of Lincoln Center
for the Performing Arts

Dr. David A. Nadler
Vice Chairman
of Marsh & McLennan Companies

U.S. Congresswoman Carolyn Maloney
(D-12-NY), Senior Member,
House Financial Services Committee:
Ranking Member, Subcommittee on Financial
Institutions and Consumer Credit

Duncan Niederauer
CEO
NYSE Euronext

Martina Hund-Mejean
Chief Financial Officer of MasterCard

Olena Paslawsky
CFO
of the Metropolitan Museum of Art

Beatriz (Betty) Manetta
President and CEO
Argent Associates, Inc.

Karen B. Peetz
CEO of Financial Markets and Treasury Services
of BNY Mellon

Christine C. Quinn
New York City Council Speaker
District 3 – Council Member – Democrat

John Strangfeld
Chairman and CEO of
Prudential Securities Inc.

Kavita Ramdas
President and CEO
of the Global Fund for Women

Scott M. Stringer
New York City Comptroller

Dick Parsons
Senior Advisor
Providence Equity Partners, Inc.

Olena Paslawsky
CFO
of the Metropolitan Museum of Art

Carol Sawdye
Vice Chairman and CFO
PricewaterhouseCoopers

Mona K. Sutphen
White House Deputy Chief of Staff for Policy in the
Obama administration (09-11')

Harold (Terry) McGraw III
Executive Chairman, President and CEO of
The McGraw-Hill Companies

John Thiel
Head of Merrill Lynch
Wealth Management

Michael Roth
Chairman and CEO
of the Interpublic Group

Maria T. Vullo
Superintendent of the
NYS Department of Financial Services

Mary Schapiro
Chairman of the SEC

Edie Weiner
President
Weiner, Edrich, Brown, Inc

Lisa Schlosser
Federal Deputy
Chief Information Officer

Sheila Wellington
President of Catalyst

Muriel Siebert
President and CEO of
Muriel Siebert & Co., Inc.

John C. Whitehead
Chairman of the
Lower Manhattan Development Corporation

Anne-Marie Slaughter
President and CEO of
New America

Deborah Wright
Chairman and CEO
of Carver Bancorp, Inc.

Jeff Sprecher
Founder, CEO & Chairman
of IntercontinentalExchange

Dan Yergin
Co-founder and Chairman of
Cambridge Energy Research Associates

FINANCIAL WOMEN'S ASSOCIATION ANNUAL AWARDS HONOREES

2021

Private Sector Woman of the Year



Tina Byles Williams
Founder and
Chief Executive Officer
Xponance®

Public/Non-Profit Sector Woman of the Year



**4-Star General
Jacqueline D. Van Ovost**
Commander of U.S.
Transportation Command

Male Ally of the Year



Roger G. Arrieux, Jr.
NY Managing Partner
Deloitte LLP

2021

Private Sector Woman of the Year



Carla Harris
Vice Chairman and
Managing Director
Morgan Stanley

Public/Non-Profit Sector Woman of the Year



Jo Ann Jenkins
Chief Executive Officer
AARP

Male Ally of the Year



Jean-Yves Fillion
CEO
BNP Paribas USA

2019

Private Sector Woman of the Year



Pallavi Sebastian
Chief of Staff & Operations
for Financial Services
Microsoft US

Public/Non-Profit Sector Woman of the Year



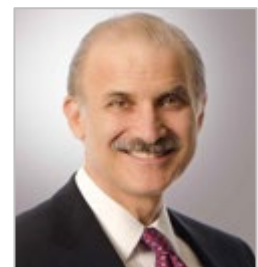
Kathy Hochul
New York State
Lieutenant Governor

Entrepreneur of the Year



Chaya Pamula
Co-founder,
President & CEO
PamTen & SheTek
Founder of SOFKIN

Male Ally of the Year



Stephen E. Zweig
Partner
Ford & Harrison LLP

Private Sector Woman of the Year

2018



Deirdre Stanley
Executive Vice President
and General Counsel
Thomson Reuters

Public/Non-Profit Sector Woman of the Year



Anne-Marie Slaughter
President and CEO
New America

FWA Pioneer Leadership Award

2017



Frances Hesselbein
Founder, Hesselbein Leadership
Institute; former CEO Girl Scouts
of America; Presidential Medal of
Freedom Recipient

FWA Woman of the Year



Sara Mathew
Chairman and CEO
Dun & Bradstreet (retired)

FWA Image Maker Award



Candace Straight
Executive Film Producer, "Equity",
Investment Banker, past
President FWA, member of
several Boards of Directors

Private Sector Woman of the Year

2016



Colleen Campbell
Vice Chair
BMO Capital Markets

Public/Non-Profit Sector Women of the Year



FWA's Past Presidents

Trailblazer of the Year

2015



Trailblazer of the Year
Cathy Engelbert
Chief Executive Officer
Deloitte, LLP

Public/Non-Profit Sector Woman of the Year



Lisa Schlosser
Federal Deputy Chief
Information Officer
OMB

Private Sector Woman of the Year

Public/Non-Profit Sector Women of the Year

2014



Martina Hund-Mejean
Chief Executive Officer
MasterCard



Vicki L. Fuller
CIO, New York State
Common Retirement Fund

2013

Private Sector Woman of the Year



Barbara J. Krumsiek
Chair, President and Chief
Executive Officer
Calvert Investments, Inc.

Public/Non-Profit Sector Woman of the Year



Judith Rodin, Ph.D.
President
The Rockefeller Foundation

Visionary Woman of the Year



Betsy West
Executive Producer, Storyville
Films and "MAKERS: Women
Who Make America"

Private Sector Woman of the Year

Public/Non-Profit Sector Woman of the Year

2012



Maria Bartiromo
CNBC's "Closing Bell"
Anchor/Managing Editor ,
"Wall Street Journal Report
with Maria Bartiromo"



Paula Gavin
President
National Urban Fellows, Inc.

2011



Irene Dorner
President & CEO
HSBC Bank, USA, N.A.



Sylvia Ann Hewlett
Founding President
Center for Work-Life Policy

2010



Karen Peetz
Chief Executive Officer
Financial Markets & Treasury
Services
BNY Mellon



Gail J. McGovern
President and CEO
The American National Red
Cross

Private Sector Woman of the Year

Public/Non-Profit Sector Woman of the Year

2009



Amy Woods Brinkley
Global Risk Executive
Bank of America Corporation



Sheila C. Bair
Chairman
Federal Deposit Insurance
Corporation

2008



Christine A. Poon
Vice Chairman, Board of
Directors
Worldwide Chairman,
Pharmaceuticals Group
Johnson & Johnson



Evelyn H. Lauder
Senior Corporate Vice
President
The Estée Lauder Cos.
Founder and Chairman
The Breast Cancer Research
Foundation

2007



Anne M. Mulcahy
Chairman & CEO
Xerox Corporation



Kathryn Fuller
Chair of the Board
The Ford Foundation

2006



Sharon Allen
Chairman of the Board
Deloitte & Touche USA LLP



Nancy M. Barry
President
Women's World Banking

2005



Marjorie Magner
Chairman and CEO
Global Consumer Group
Citigroup



Maria Otero
Founder and President
Women's Venture Fund

2004



Dina Dublon
Chief Financial Officer
J.P. Morgan Chase & Co.



Kavita Ramdas
President and CEO
Global Fund for Women

Private Sector Woman of the Year

Public/Non-Profit Sector Woman of the Year

2003



Sallie L. Krawcheck
Chairman and CEO
Smith Barney



Beverly Daniel Tatum
President
Spelman College

2002



Mary C. Farrell
Managing Director
Member of the Investment
Policy Committee
UBS PaineWebber Inc.



Kathryn S. Wylde
President and CEO
The New York City
Partnership &
Chamber of Commerce

2001



Nancy Peretsman
Executive Vice President
and Managing Director
Allen & Company
Incorporated



Catherine R. Kinney
Group Executive Vice
President and
Member of the Office of the
Chief Executive
New York Stock Exchange

2000



Pamela Thomas-Graham
Executive Vice President
CNBC
President and CEO
CNBC.com



Mary L. Schapiro
President
NASD Regulation, Inc.

1999



Abby Joseph Cohen
Partner and Chief Market
Strategist
Goldman, Sachs & Co.



**Ambassador Charlene
Barshefsky**
U.S. Trade Representative

1998



Edwina Woodbury
Executive Vice President,
Chief Financial & Administrative
Officer
Avon Products, Inc.



Alice M. Rivlin
Vice Chair, Board of
Governors
Federal Reserve System

Private Sector Woman of the Year

Public/Non-Profit Sector Woman of the Year

1997



Nancy S. Donovan
President and CEO
NOVIS Corporation



Ruth J. Simmons
President
Smith College

1996



Lois Juliber
President
Colgate-North America



Honorable Madeleine Albright
U.S. Representative
The United Nations

1995



Angela Dunlap
President
MCI Consumer Markets



Laura D'Andrea Tyson
Assistant to the President
for Economic Policy

1994



Muriel F. Siebert
President & Chairman
Muriel Siebert & Co., Inc.



Hon. Christine Todd Whitman
Governor
The State of New Jersey

1993



Ellen Gordon
President and COO
Tootsie Roll Industries



Hon. Margaret M. Richardson
Commissioner
Internal Revenue Service

1992



Judy C. Lewent
Vice President, Finance and
CFO
Merck and Co., Inc.



Hon. Barbara Hackman Franklin
Secretary
U.S. Department of
Commerce

1991

Maria Monet
CFO and Director
Ogden Corporation



Jill M. Considine
Managing Director and CAO
American Express Bank
(former NYS Superintendent
of Banks)

Private Sector honorees only before 1991



1990
Joan Edelman Spero
Senior Vice President and
Treasurer
American Express Company

1989
Deborah Coleman
Vice President, Finance
Apple Computer, Inc.



1988
Karen Horn
Chairman and CEO
Bank One, Cleveland



1987
Cathleen Black
Publisher
USA Today



1986
Jane Evans
President and CEO
Monet Crystal Brands, Inc.



1985
Dr. Marina Whitman
Vice President and
Economist
General Motors Corp.

Revised: February 2022

FWA INTERNATIONAL BUSINESS CONFERENCES

Each year the FWA targets a destination where fundamental investment and business opportunities are developing. Following an initial trip to China in 1977, when the FWA was one of the first groups to visit after a reopening of that country, the globalization of finance led the FWA in 1985 to initiate its series of international business conferences. In each location, the delegation meets with the most senior government and business leaders to understand the investment potential in these countries and to learn of government's role in support of economic expansion.

International Business Conference 2022 destination: **To be Announced**

| | | | |
|-------------|--------------------------------|-------------|---------------------------------|
| 2021 | The Netherlands (Cancelled) | 2002 | Warsaw and Krakow |
| 2020 | Tel Aviv and Jerusalem, Israel | 2001 | Silicon Valley, USA |
| 2019 | Mumbai and New Delhi, India | 2000 | Istanbul and Ankara |
| 2018 | Tokyo, Japan | 1999 | Hong Kong, Shanghai and Beijing |
| 2017 | Toronto and Vancouver, Canada | 1998 | Dublin |
| 2016 | Singapore and Hong Kong | 1997 | Sydney and Melbourne |
| 2015 | London, England | 1996 | Cape Town and Johannesburg |
| 2014 | Berlin, Germany | 1995 | New Delhi and Bombay |
| 2013 | Washington, D.C. | 1994 | Brussels and Amsterdam |
| 2012 | Abu Dhabi and Dubai | 1993 | Buenos Aires |
| 2011 | Brazil | 1992 | Mexico City |
| 2010 | Costa Rica program in New York | 1991 | Budapest |
| 2009 | India Conference in New York | 1990 | INSEAD |
| 2008 | Moscow and St. Petersburg | 1989 | Toronto |
| 2007 | Hanoi and Ho Chi Minh City | 1988 | Madrid |
| 2006 | Stockholm and Gothenburg | 1987 | London |
| 2005 | Dominican Republic | 1986 | Tokyo, Beijing, and Hong Kong |
| 2004 | Tokyo | 1985 | London and Paris |
| 2003 | Milan and Rome | 1977 | China |

INTERNATIONAL CONFERENCES DISTINGUISHED SPEAKERS

Inon Elroy

*Economic Minister to North America
Government of Israel
2020 – Tel Aviv, Israel*

Niranjan Rajadhyaksha

*Research Director and Senior Fellow
IDFC Institute
2019 – Mumbai, India*

Takuji Tanaka

*Deputy Director General for International Tax
Policy, Tax Bureau
Ministry of Finance, Japan
2018 – Tokyo, Japan*

The Honourable Navdeep Singh Bains

*Minister of Innovation, Science, and Economic
Development for Canada,
Member of Parliament for Mississauga–Malton
2017 – Toronto/Vancouver, Canada*

Sulian Margaret Tay

*Managing Director, Investments
Temasek International Pte. Ltd.
2016 – Singapore*

Dame Fiona Woolf

*Lord Mayor of London 2013/14
Energy and Infrastructure Lawyer
CMS Cameron McKenna
2015 – London, England, United Kingdom*

Dr. Elke Koenig

*President
German Federal Financial Supervisory Authority
2014 – Berlin, Germany*

Alan B. Krueger

*Chairman of the White House
Council of Economic Advisers
2013 – Washington, D.C.*

Dr. Nasser H. Saidi

*Chief Economist
Dubai International Financial Centre
(DIFC) Authority
2012 – United Arab Emirates, Dubai and Abu Dhabi*

Luciana Dias

*Commissioner, Brazilian Securities
& Exchange Commission, Rio de Janeiro
Professor, Securities Regulation &
Banking Law, Law School of
Fundação Getúlio Vargas, Rio de Janeiro
2011 – Brazil*

Jairo Hernandez Milian

*Ambassador, Deputy Permanent Representative
Permanent Mission of Costa Rica to the UN
Moderator for Costa Rica: Leading Green and
Sustainable Development in the Americas
2010 – Costa Rica Event, NYC*

Dr. A.M. Gondane

*Deputy Consul General of India in New York
2009 – India Conference, NYC*

Tatyana Nesterenko

*Deputy Finance Minister
2008 – Russia*

H.E. Mr. Nguyen Sinh Hung

*First Deputy Prime Minister
2007 – Vietnam*

Elisabeth Tarras-Wahlberg

*Marshal of the Court The Royal Court
2006 – Sweden*

Bernardo Vega

*President
Fundación Cultural Dominicana
Ex-Dominican Ambassador to the United States
2005 – Dominican Republic*

Toshitsugu Shimizu
Executive Officer
Tokyo Stock Exchange
2004 – Japan

Vito Tanzi
Undersecretary
Ministry of Economy and Finance
2003 – Italy

Aleksander Kwaśniewski
President
The Republic of Poland
2002 – Poland

Carol Bartz
CEO
Autodesk
2001 – Silicon Valley

Hakan Özyildiz
Director General of Public Finance
Turkish Treasury Department
2000 – Turkey

Wu Yi
State Councilor
People's Republic of China
1999 – China

Mary McAleese
President of Ireland
1998 – Ireland

Hon. John Fahey, MP
Minister for Finance
1997 – Australia

Roy C. Andersen
Executive President
Johannesburg Stock Exchange
1996 – South Africa

Mr. K. N. Memani
Chairman Foreign Trade &
Investment Commission, PHD
Chamber of Commerce & Industry
1995 – New Delhi and Bombay

Robert Urbain
Minister
Belgian Ministry of Foreign Trade
and European Affairs
1994 – Brussels and Amsterdam

Domingo Jorge Messuti
President
Banco de Inversion y Comercio Exterior (BICE)
1993 – Buenos Aires

Carlos Salinas de Gortari
President of Mexico
1992 – Mexico City

Mihály Kupa
Minister of Finance (Budapest)
1991 – Budapest

M. Jean-Paul Cluzel
Ministry of Finance (Paris)
1990 – INSEAD

Hon. Barbara McDougall
Minister of Employment and Immigration
Member of Parliament
1989 – Toronto

His Majesty King Juan Carlos
King of Spain
1988 – Madrid

Sir David Rowe-Ham
The Right Honorable Lord
Mayor of London
1987 – London

Sir David Akers-Jones
Chief Secretary, Chief Executive and
Head Administrator
Hong Kong Government
1986 – Tokyo, China and Hong Kong

Patrick Mitford-Slade
London Stock Exchange
1985 – London and Paris

2020 – 2021 FWA Events

Hosted by President's Circle Members*

Work/Life Recalibration: Adapting to the New World of Work (June 2021) – First event in a series regarding work/life recalibration where Deloitte provides current trends, insights, and leading practices that companies can use to adapt to workforce expectations as well as address the implications of these expectations across the organization. Speakers: **Matt Highfield**, Managing Director, Deloitte; **Tina Witney**, Managing Director, Deloitte. Firm: **Deloitte**.

2021 Virtual Annual FWA Awards Ceremony (May 2021) – Virtual ceremony honoring Public Sector Woman of the Year (**Jo Ann Jenkins, Chief Executive Officer, AARP**), Private Sector Woman of the Year (**Carla Harris, Vice Chairman and Managing Director, Morgan Stanley**), Male Ally of the Year (**Jean-Yves Fillion, CEO, BNP Paribas USA**), FWA President's Circle Pacesetters, and FWA High School and College Mentees. FWA Standard Bearer: **AARP**. FWA Supporter: **Ninety One**. Cornerstone Partner: **BNP Paribas**.

FWA's Fourth Annual Summit - The Future is Now (March 2021) – Two-day virtual event featuring four main sessions:

- *Session 1: Future of Work: The New Work Dynamics in a Post Pandemic Age*
- *Session 2: The Economic Outlook for the Eurozone*
- *Session 3: Courageous Conversations*
- *Session 4: Moving Forward: Stakeholder Capitalism - Reimagining Corporate Commitment to Creating Sustainable Value*

Summit Event Sponsor: **BMO**. Cornerstone Sponsor: **BNP Paribas**.

The FWA's New Year's Celebration Benefit (January 2021) – Virtual gathering to celebrate the new year, new opportunities, and share gratitude. Speakers: **Carla Graifer**, specialist and educator of American and local cheese; **Rudie Smith**, owner and head cheese monger of Olsson's Fine Foods; **Alexandra Janelli**, premier guided visualizationist, hypnotherapist, and life coach. Featuring: **The NY Vintners Philosophy; Olsson's Fine Foods**. Event Sponsors: **ING; New York Life; Investors Bank**.

Fireside Chat with Shellye Archambeau: Unapologetically Ambitious (October 2020) – Virtual event set to guide participants on how to achieve their dream jobs, career aspirations and create the life they want for themselves. Speaker: **Shellye Archambeau**, Experienced CEO and Board Director, Author. Sponsor: **SMBC's WIN: Women's Inclusion Network** and **BOLD: Black Organization for Leadership & Development (Employee Resource Groups)**.

Fireside Chat with Shellye Archambeau: Unapologetically Ambitious (October 2020) – Virtual event set to guide participants on how to achieve their dream jobs, career aspirations and create the life they want for themselves. Speaker: **Shellye Archambeau**, Experienced CEO and Board Director, Author. Sponsor: **SMBC's WIN: Women's Inclusion Network** and **BOLD: Black Organization for Leadership & Development (Employee Resource Groups)**.

**In response to COVID-19, the FWA has delivered event content virtually since March 2020. Although our sponsors did not host these events, many of their employees benefited by attending webinars or participating interactively in these virtual sessions.*

Annual Meeting of Members & New Member Welcome (June 2021) – Newly elected Executive Officers and Directors are announced, and attendees hear from the incoming President, Hermina "Nina" Batson, as she outlines her vision for the upcoming FWA fiscal year.

Alfresco Dining in NJ: Celebrating the Coming of Summer! (June 2021) – In-person event

Greening the Grid: Financing the Supply Chain of Tomorrow (June 2021) – Speakers: **Catherine Loubier**, Québec's Delegate General in New York; **Keira Huang**, Investment Team, Boralex Inc.; **Eric Desaulniers**, President & CEO, Nouveau Monde Graphite.

NAMASTE. Get Calm. TEA TIME with Cindi Bigelow, CEO of BIGELOW TEA (May 2021) – Speakers: **Cindi Bigelow**, 3rd generation President & CEO of family-owned Bigelow Tea. **Martha Post**, Growth Catalytics.

U.S. Economic Roundtable: What to Expect from an Economic Recovery (May 2021) – Speakers: **Steve Liesman**, CNBC Senior Economics Reporter; **Michelle Meyer**, Chief U.S. Economist, Bank of America; **Lindsey Piegza**, Chief Economist, Stifel; **Dana Perterson**, Chief Economist, The Conference Board.

Send Me an Angel...Investor and Crowdfunding (May 2021) – Speakers: **Nicolas Leeper**, Senior Associate, SeedInvest; **Anna Toshach**, Senior Research Analyst - Concentrated Growth, AllianceBernstein; **Tanya van Court**, Founder and CEO, Goalsetter; **Ann Balderston-Glynn**, EMMY Award-winning Producer.

Introduction to Coding: Building a Website (May 2021) – Partner: **COFFEE & CODED**

The Little Book of Life Skills: Your Day from Start to Finish with Erin Zammatt Ruddy (April 2021) – Speaker: **Erin Zammatt Ruddy**, Author.

Demystifying Decentralized Finance (DeFi) : The Story of 2021 (April 2021) – Speakers: **Fabian Schär**, Professor at the University of Basel and Managing Director at the University's Center for Innovative Finance; **Mona El Isa**, Founder of Melonport Ag and CEO of Avangarde Finance; **Jacek Czarnecki**, Global Legal Counsel at Maker Foundation; **Samantha Pelosi**, Senior Vice President at BAFT; **Robert Kopitsch**, Co-Founder and Secretary General of Blockchain for Europe, and FinTech & Blockchain Lead for Europe at APCO.

Emerging Leaders Unite: the FWA/CFA YLG's Virtual Happy Hour (March 2021)

The Power of Your Online Presence (March 2021) – Speaker: **Anouk Pappas**, Brand Anthropologist, Online Presence Architect, CEO Signitt - Founder CoolBrands People.

FWA Virtual Committee Fair 2.0 (February 2021)

How to Stay SANE and Productive – Even in a Crisis! (February 2021) – Speaker: **Kathryn Mayer**, President & Founder of KC Mayer Consulting, Inc.

Pushing Your Envelope: How People Defeat Self-Doubt and Live with Bold Confidence (February 2021) – Speaker: **Maureen Zappala**, Keynote Speaker, Author, Presentation Skills Coach, Founder High Altitude Strategies, Podcast Host of "No Doubt Allowed"

FWA-NJ: Meet & Mingle (Virtually) (February 2021)

Letting Go of LIBOR 2.0 - Countdown to December 31, 2021 (February 2021) – Speakers: **Mark Cabana**, Managing Director, Head of US Rates Strategy, BofA Global Research; **Pia Friis**, Managing Director, MUFG; **Jeanne Naughton-Carr**, Managing Director and Associate General Counsel, The Bank of New York Mellon; **Herman "Nina" Batson**, FWA President-Elect and Leadership Council Chair

Innovation in Healthcare: Role of Impact Investing to Build Back Better after COVID-19 (January 2021) – Speakers: **Dr. Roopa Dhatt**, Executive Director and Co-Founder, Women in Global Health; **Curt Labelle**, MD – President, Global Health Investment Fund; Katrina Ngo, Senior Manager Strategic Partnerships, Global Impact Investing Network.

Supply Chain Management & Trade Financing (January 2021) – Speakers: **Jonathan Eaton**, Principal, National Supply Chain Practice Leader, Grant Thornton; **Marisel Trespalacios**, Senior International Trade Specialist, U.S. Department of Commerce's Commercial Service Long Island Office; **Ana Isabel Ramirez**, Trade & Supply Chain Finance Specialist, City National Bank; **Cristina Givolechian**, SVP – Commercial Banking, City National Bank.

Data Driven? Do I Need to be a Data Analyst? What If I am Not a Tech Person... (January 2021) – Speaker: **Stacey Schwarcz**, Founder and CEO, Ariel Analytics.

Developing Personal Resilience: Learning to Thrive in a Time of Enormous Change and Ambiguity (January 2021) – Speaker: **Charlotte Lee**, Managing Consultant, SVP, Executive Coach and ICEO Advisor of LHH.

Influencing & Negotiating For Women: Everything You Ever Wanted to Learn in an Hour with Lee Miller (January 2021) – Speaker: **Lee Miller**, Executive Coach and Corporate Trainer in the field of leadership, influencing and innovation.

Taking Control of Your Health in the New Year: Fireside Chat with Dr. Laura Fisher & Simone Vinocour (January 2021) – Speakers: **Laura Lani Fisher**, M.D. F.A.C.P.; **Simone G. Vinocour**, FWA President 2019-2021.

Developing Followership - What Admired Leaders Do Differently (December 2020) – Speakers: **Catherine Flax**, Managing Director, CRA; **Chloe Tseung**, Managing Director, CRA.

Corporate Gifting and Holiday Trends featuring the Coutureman (November 2020) – Speaker: **LaMar Wright**, The Coutureman LLC. Special Thanks: **Ethopia Lane**, Coutureman; **Harris Greenstein**, NY Vintners; **Elvia Francis**, Nordstrom; **Kareem "Reem" Warner Tyson**, videographer.

Thinking Ahead (November 2020) – Speakers: **Sally Glick**, Principal of the Firm, Sobel & Co; **Cynthia E. Dietzel**, Senior Vice President/Senior Sales Executive, Employee Benefit, USI Insurance Services; **Mary Ford**, CPA, MST, Tax Director, SobelCo.; **Trina Mitsch**, Financial Advisor, Managing Director - Investment Officer, Wells Fargo Advisors.

RBG - Reflections and a Celebration of a Monumental Supreme Court Justice (November 2020) – Speakers: **Betsy West**, Director & Producer; **Karen. M Elinski**, SVP, Government Relations & Public Policy Wells Fargo & Co. and FWA Past President (2018-2019); **Susan L. Harper**, Managing Director, Bates Group, FWA Past President 2012-2013 and FWA Military Liaison.

Corporate Governance and Overcoming Inequality: Perspective from Women on Boards (November 2020) – Speakers: **Maria Green**, former Senior Vice President and General Counsel, Ingersoll-Rand; **Teri McClure**,

retired General Counsel and Chief Human Resources Officer, United Parcel Service, Inc.; **Laureen Seeger**, Chief Legal Officer, American Express Company; **Gail Lieberman**, Managing Partner at Rudder Capital LLC.

Leading Through Times of Stress (Third workshop in a series offered by Jacquelyn Wieland) (November 2020) – Speaker: **Jacquelyn K. Wieland**, MS, BS, Solutions Provided, LLC.

Building the Space Force: A Conversation with Brigadier General Jody A. Merritt (November 2020) – Speaker: **Brigadier General Jody A. Merritt**.

The Changing Landscape of Commercial Finance (October 2020) – Speakers: **Barbara Callahan**, SVP, Investor Relations, CIT Group; **Debra Putzer**, SVP, Credit Risk Management, CIT; **Arminda Youse-Warde**, SVP, Texas Capital Bank; **Lin Chua**, President & CFOO, Head of Cap Mkts, Internex Capital.

Make Work WORK For You! (October 2020) – Speaker: **Carson Tate**, Consultant and Executive Coach.

FinTech 101-The FWA Way! (October 2020) – Speaker: **George Theka**, Senior Engineering Manager, *The New York Times*.

Economy, Elections and Equality: A Conversation with NY Lieutenant Governor Kathy Hochul (October 2020) – Speakers: **Kathy Hochul**, New York's Lieutenant Governor, FWA's 2019 Public Sector Woman of the Year, and recipient of the Equal Harriet Tubman Award; **Karen. M Elinski**, SVP, Government Relations & Public Policy Wells Fargo & Co. and FWA Past President (2018-2019).

Leading Through Times of Stress (Second Workshop in a series offered by Jacquelyn Wieland) (October 2020) – Speaker: **Jacquelyn K. Wieland**, MS, BS, Solutions Provided, LLC.

Relaunching Your Career During COVID and Beyond (September 2020) – Speakers: **Ann Marie Morris**, Talent Management | OD | Change Management; **Patti Mittelman**, Chair of FWA's Back2Business Program; **Robin Nack**, Marketing Manager at New York Life.

FWA's Fireside Chat with Dan Yergin: The New Map: Energy, Climate, and the Clash of Nations (September 2020) – Speakers: **Dan Yergin**, Expert on Energy, Politics, and Economics, and Pulitzer Prize-winner and Bestselling Author; **Patti Domm**, CNBC Markets Editor.

Leading Through Times of Stress (First Workshop in a series offered by Jacquelyn Wieland) (September 2020) – Speaker: **Jacquelyn K. Wieland**, MS, BS, Solutions Provided, LLC.

Transforming in Times of Crisis: Lessons from Executives at The Estée Lauder Companies (September 2020) – Speakers: **Martine Broeders**, Vice President of Transformation Initiatives, Strategy & New Business Development; **Angela Han**, Vice President of Global Brand Finance & Strategy; **Jessica Ansehl Steinberg**, Executive Director, Global Online Finance & Strategy.

Operating Principles for Impact Management: A Key Milestone in Growing the Impact Investing Market (September 2020) – Speakers: **Diane Damskey**, Head of Secretariat, Operating Principles for Impact Management IFC; **Rekha Unnithan**, Co-head of Impact Investing, Nuveen; **Tony Berkley**, Vice President, Prudential Financial Inc.; **Manju Seal**, Former, Head of Sustainable Finance, Advisory, BMO Capital Markets.

Alfresco Dining in NJ: A Win/Win Opportunity (September 2020)

Network with Selby Jennings: Helping Solve the Number One Challenge: Talent 2.0 (August 2020) - Speakers: **Jack Trudeau**, Executive Director at Phaidon International; **Kareem Bakr**, Executive Director at

Selby Jennings; **Gary McCool**, Senior Vice President - Head of U.S. Corporate & Investment Banking; **Victoria McGill**, Director- Head of U.S. Investment Management.

Selby Jennings: Helping Solve the Number One Challenge – Talent (August 2020) – Speakers: **Jack Trudeau**, Executive Director at Phaidon International; **Kareem Bakr**, Executive Director at Selby Jennings; **Allison Idarraga**, SVP, Client Services & Account Management for Phaidon International North America.

Virtual 30-Minute Mentoring Sessions (August 2020) – Speaker: **Nancy Ancowitz**, Career Coach and Author.

Podcast: Discovering Your Personal Productivity Style (July 2020) – Speaker: **Carson Tate**, Consultant and Executive Coach.

Webinar: Allies? Sponsors? What’s Really Required to Advance Women in Leadership? – Speaker: **Jodi Detjen**, Organizational Consultant and Educator.

Webinar: What’s Next: Planning for your Future (July 2020) – Speaker: **Joyce Sullivan**, Senior Vice President, Operations Director at LHH.

Webinar: Thriving as a Working Parent During a Pandemic (July 2020) – Speakers: **Helen Dayen**, Influence Coach; **Mary E. Miele**, Education Expert of New York City Private and Public school systems.

Webinar: Shopping and Dressing Post Corona – What Will it Look Like? (July 2020) – Speaker: **Sharon Kornstein**, AICI, CIP, ImageDesign LLC

Webinar: The Future of Gender, Diversity and Work in the Age of the Pandemic (July 2020) – Speaker: **Melissa Fisher**, Cultural Anthropologist and a Visiting Scholar at New York University.

Webinar: Leadership In A Virtual Environment (July 2020) – Speaker: **Helen Dayen**, Influence Coach.

Revised: November 2021

2019 – 2020 FWA Events

Hosted by President's Circle Members*

WEBINAR: Perspectives on the Challenging Global Investment Climate (May 2020) – A webinar featuring professional advice and perspective on critical topics including the intense market volatility, tremendous economic upheaval, impact on the job market, and future investment strategy. Speaker: **David Morris**, Investment Professional and Senior Managing Director, Stifel. Hosted by Stifel.

A Conversation with Frank Diana - Futurist and Thought Leader (March 2020) – An invitation only event providing a futurist perspective blended with a pragmatic and actionable approach. Speaker: **Frank Diana**, a Futurist, Thought Leader, and frequent Keynote Speaker. Hosted by Wells Fargo.

The Power of Putting Yourself First (February 2020) – An event where participants learn the strategies to be the best version of themselves without the guilt that often comes with self-care. Speaker: **Monica Guzman**, Executive Coach and Motivational Speaker. Hosted by SMBC.

Changing Lanes (November 2019) – An event to learn from four high-level women who have changed career paths, either within their firms or from one industry to another, and how that change contributed to their current success. Moderator: **Felicia Sokalski**, Partner, Deloitte & Touche LLP. Speakers: **Heather Hunt Ruddy**, Head of Client Experience and Growth, Wells Fargo Advisors; **Michele Crish**, Advisory Managing Director | Financial Services, Deloitte & Touche LLP; and **Neely Pielet**, Director of Supply Chain Finance, Unilever Hosted by Deloitte.

Vision Lab: Empowering Yourself for Exponential Success (October 2019) – A powerful creative space away from the daily grind, Vision Lab includes interactive tools and on-the-spot coaching. Speaker: **Kate Gardner**, trusted advisor and coach to leaders for 14 years. Hosted by BNP Paribas.

FWA-NJ: Maximizing the Impact of an Internal Women's Group (October 2019) – An invitation only event that focused on sharing success stories and challenges to help leaders improve the impact of their groups. Speakers: **PNC**; **Terry Pissi**, Anchin; and **Elaine Rizzo**, Investors Bank. Hosted by PGIM.

Banking Culture & Behaviours – Where Compliance, Ethics & Leadership Meet to Create Positive Change (October 2019) – An event to discuss what companies and regulators are focusing on today around the globe, how media and communications shape ethics and compliance, and more. Moderator: **Catherine Flax**, Advisor to Senior Executives and Leadership Teams, Managing Director, CRA, Inc. Panelists: **Krisztina Anspach**, Leader, Admired Leadership® | Asia; and **Terri Austin**, Legal Analyst and Adjunct Professor, University of Southern California. Hosted by MUFG.

Tariffs and Dollars and Rate Cuts...OH MY!!! The Outlook for 3Q 2019 and Into 2020 (September 2019) – An informative conversation on the Federal Trade Reserve, trade wars, U.S. bon and stock markets, and more. Speaker: **Christopher Rupkey**, Managing Director and Chief Financial Economist in the Economic Research Group of MUFG with a focus on financial markets, Federal Reserve policy and international economies including Japan. Hosted by MUFG.

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2020 Annual Virtual Meeting & New Member Welcome (June 2020)

Virtual Committee Fair (June 2020) – Event for FWA committees to connect to old and new members

Webinar: Managing Personal Finances During Troubling Times: Getting Back to the Basics (June 2020) Speaker: **Liz Crystal**

WEBINAR: Career Coaching Workshop: Tell the Career Coach What's on Your Mind (June 2020) – Speaker: **Jim Arnoff**, Certified Professional Coach, JD

WEBINAR: From Worried to WOW! Own the Virtual Room & Deliver Standout Online Presentations (May 2020) – Speaker: **Casey Carpenter**, Career Coach

Leadership & Lessons Learned: Working Remotely & Job Seeking During Times of Change (May 2020) – Speaker: **Philip Anker**, CEO – Americas, Ninety One; **Lorena Cabezas**, Regional Director, Midwest, Ninety One

WEBINAR: Communicate More By Saying Less: How to Get to the Point (May 2020) – Speaker: **Diane DiResta**, Certified Speaking Professional

WEBINAR: From Pajamas to PRESENCE: Putting Your Best Face Forward in the Virtual Room! (May 2020) – Speakers: **Tania Sterl**, Founder of Sterl on Style; **Sharon Becker**, Makeup Artist

WEBINAR: Letting Go of LIBOR – How to Prepare for the Inevitable (May 2020) – Speakers: **Claire Hall**, Partner, DLA Piper; **Pia Friis**, Managing Director, MUFG Americas; **Isabelle Ord**, Partner, DLA Piper; **Ashley Washington**, Senior Manager, Deloitte Risk and Financial Advisory; **Mimi Mengis** (Moderator), Managing Director, Head of Continuous Improvement, MUFG

WEBINAR: The Evolving Landscape of Impact Investing - Implications of COVID-19 (May 2020) – Speakers: **Sarah Greenberg**, Executive Director, ESG Client Coverage, MSCI; **Keiko Honda**, Adjunct Professor and Adjunct Senior Research Scholar, Columbia | SIPA; **Leslie Samuelrich**, President, Green Century Funds; **Rachael Camargo** (Moderator), HSBC Private Bank

Virtual 30-Minute Mentoring Sessions (May 2020) – Speaker: **Nancy Ancowitz**, Career Coach

Webinar: Imagine: A Career & A Life (April 2020) – Speaker: **Ellen Goldman**, Coach and Training, EllenG Coaching

Virtual Cocktail: Stay in the Game with Clarity and Positivity (April 2020) – Speaker: **Regina Huber**, Founder & CEO of Transform Your Performance

WEBINAR: Make Working Virtually Work For You! (April 2020) – Speaker: **Carson Tate**, Dynamic Teacher and Coach

WEBINAR: Embracing What You Can Control in Your Career...Lose the Fear, Gain the Power (April 2020) – Speaker: **Jim Arnoff**, Certified Professional Coach, JD

Revised: July 2020

2018 – 2019 FWA Events

Hosted by President's Circle Members

2019 FWA Annual Meeting and New Member Welcome (Jun 2019) – Provides a retrospect of the year's accomplishments and the announcement of new leadership and focus for the next fiscal year. Hosted by New York Life.

FWA 3rd Annual Summit: A Rising Tide: Corporate Citizenship (May 2019) – An all-day summit designed to encourage discussion on how companies optimize corporate citizenship initiatives in today's rapidly changing social, cultural and global business landscape. Sponsored by BNP Paribas. Lunch sponsored by Sidley Austin LLP.

Annual Director's Reception (April 2019) – Panelists: **Holly J. Gregory**, co-chair of Sidley's global Corporate Governance and Executive Compensation practice; **Beth Haddock**, Managing Partner of Warburton Advisers; **Shelley Leibowitz**, Board of Directors of E*Trade Financial Corporation; and **Robin F. Lenna**, former Executive Vice President of MetLife's Retirement and Income Solutions business. Hosted by Sidley Austin LLP.

Matching Impact and Purpose through Personal Philanthropy (April 2019) – Invitation only event featuring top-level female leaders in Personal Philanthropy. Featured speakers: **Cary Carbonaro**, Managing Director & Partner at United Capital Financial Advisors, LLC; **Jenna Mulhall-Brereton**, Chief Philanthropic Services Officer of National Philanthropic Trust; and **Phyllis Costanza**, CEO of UBS Optimus Foundation. Moderated by **Lauren Young**, Wealth Editor at Reuters. Hosted by BNY Mellon.

Back2Business Workshops 1 & 2 (Mar 2019) – Informational workshop that allowed networking with sponsoring organization representatives as well as brush up on resume writing, personal branding and Social Media trends and meet individuals who have successfully re-entered the workforce through re-entry programs. Session One hosted by New York Life and Session Two hosted by BMO Capital Markets.

FWA Career Coaching Group: Reinventing, Reinvigorating and Recharging Your Career (Feb 2019) – Highly interactive and one-on-one coaching workshop lead by Jim Arnoff. Hosted by Sumitomo Mitsui Banking Corporation (SMBC).

5 Critical Keys That Will Create a Blueprint for Your Career Goals in the Digital Age (Jan 2019) – Workshop designed to teach how to create a functional resume, elevator pitch strategies, LinkedIn strategies, etc. Speaker: **Linda Hannett**, founder of Linda Hannett Coaching. Hosted by Wells Fargo Advisors.

Write Your Own Playbook - Take Charge of Your Future (Dec 2018) – Learning and networking event featuring speaker Digital Media Advisor **Heidi Moore** and moderated by freelance journalist and photographer **Nina Roberts**. Hosted by Wells Fargo Advisors.

Powering Potential – The Case for Gender Equality (Oct 2018) – Event discussing how gender equality can unleash positive economic and development outcomes. Panelist included: **Heidi DuBois**, Global Head of Philanthropy and Corporate Social Responsibility at BNY Mellon; and **Ilze Melngailis**, Senior Director, Global Partnerships and Business Council for the UN Foundation; **Patsy Doerr**, Global Head Corporate Responsibility and Inclusion at Thomson Reuters. Moderated by **Todd Gibbons**, Vice Chairman and CEO of Clearing, Markets and Client Management Finance at BNY Mellon. Hosted by BNY Mellon.

Stop Blending In, Start Standing Out (Sept 2018) – Workshop that discussed the qualities that one can showcase to stand out and distinguish themselves as an expert or leader. Presented by the Emerging Leaders Committee and lead by FWA leader **Regina Huber**. Hosted by Sumitomo Mitsui Banking Corporation (SMBC).

Embracing Change ... Your Key to Thriving in Your Career (July 2018) – Workshop for FWA members that discussed ways an individual can increase his/her impact, grow exponentially and expand his/her influence. Presented by career coach Jim Arnoff. Hosted by Sumitomo Mitsui Banking Corporation (SMBC).

Revised: May 2019