

Collaborative



***WIM***

**A Global Alliance to Further  
Inclusion & Diversity**

**CWIM Snapshot: Our Mission**

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# BOARD OF DIRECTORS




**Sarah Yao Schutzman, CFA**   
**Co-Founder, President & CEO**

*Managing Partner*  
**Providence Heights  
Capital Management LLC**

CFA Society Indianapolis  
Board Director, Membership Chair



**Regina Gaysina**   
**Co-Founder, Vice President  
& Treasurer**

*Vice President*  
**Municipal Finance at RBC  
Capital Markets**

CFA Society New Mexico  
Women's Advisory Committee




**Christine Tinker, CFA**   
**Co-Founder, Secretary**

*Equity Portfolio Manager*  
**Northern Trust Asset  
Management**

CFA Society Chicago  
Women's Network Co-Chair



**Arielle Bittoni, CFA**   
**Co-Founder, Director of  
Programming**

*Chief Wealth Strategist*  
**Refresh Investments LLC**

CFA Society Los Angeles  
Women's Member Community Chair



**Victoria Prescott, CFA**   
**Co-Founder, Director of Advocacy**

*Associate Director*  
**Capital Markets & Investor  
Relations at Realty Income**

CFA Society San Diego  
Board Director, Advocacy Chair

# MEET THE BOARD



**Sarah Yao Schutzman, CFA**

**Managing Partner**

**Providence Heights Capital Management LLC**



**CWIM Co-Founder, President & CEO**

CFA Society Indianapolis

Board Director, Membership Chair

I am a first-generation Chinese immigrant and female hedge fund manager. Professionally, I built my career investing in global equities and debt, across developed and emerging markets. I have seen firsthand what capital and access to capital can do. I have also experienced its personal impact, as a recipient of capital— when an Iranian immigrant with her first US research grant took a chance on my father, and gave our family a future.

My godmother passed away this summer— a survivor of the Iranian Revolution who became a Pharm D., Ph.D., and celebrated leader of the Yale University School of Medicine. Her sharp wit and fearless spirit were only surpassed by her generous heart. Her life and character demonstrated that “different” can be a great strength, and empathy is not a weakness. I am an extension of her legacy.

So to me, inclusion is both an opportunity and a moral responsibility— to share capital and power. And by investing in people, we invest in our most powerful asset, and begin a virtuous cycle.

I am humbled by the leaders globally who dedicate their own blood, sweat and tears to realize this vision, alongside us. This, to me, is the heart of Collaborative WIM.

## MEET THE BOARD (cont.)



**Regina Gaysina**

**Vice President**

**Municipal Finance at RBC Capital Markets**



**CWIM Co-Founder, Vice President & Treasurer**

CFA Society New Mexico

Women's Advisory Committee

Before I immigrated to the US from Russia, my dream was to be a diplomat and to work in public policy and international relations— but then I landed in New Mexico where everything was literally foreign to me. I was 20 years old, and suddenly had to create a new dream, new group of friends, new education and establish a new identity in a new country. When I started my career in finance, I was told many times that I could not be promoted or hold certain positions, because I didn't have an Ivy league education or because women were not hired for those roles. Yet here I am many years later defying the odds, proving folks wrong to reach those hard-earned "firsts": becoming the first female FA Muni investment banker in the state of New Mexico (and currently still the only female), and the youngest person in our office to ever become a banker.

To me, Collaborative WIM is a place where we dare to inspire others to be in the finance industry and to let them know that they can build a career of purpose and pursue their passion. It takes a village to make an impact and to create this community (alongside grit, perseverance and everyday hustle). But if we make it matter, we will make it happen.

## MEET THE BOARD (cont.)



**Christine Tinker, CFA**  
**Equity Portfolio Manager**  
**Northern Trust Asset Management**



**CWIM Co-Founder, Secretary**  
CFA Society Chicago  
Women's Network Co-Chair

I didn't know a soul in New York City when I moved there to kickstart a career in investment management. A little fish in a big pond, I doubted my decision and my dreams. Just two months later, my employer was in the headlines at the onset of the global financial crisis. As "Newbie from the Midwest" with minimal industry experience and no socioeconomic relatability or credibility in the business, I was unsure if I could survive in wealth management. When I often found that the only other woman in the room was a client who, like me, yearned for eye contact at the meeting table, I knew that giving up was not an option.

Experience taught me that visualization matters, and representation is critical. The greatest return on investment comes from investing in those most underrepresented, underserved, and unseen.

I found my purpose as a female portfolio manager, investing in the financial markets and in the ideals of inclusion and equity.

## MEET THE BOARD (cont.)



**Arielle Bittoni, CFA**  
**Chief Wealth Strategist**  
**Refresh Investments LLC**



**CWIM Co-Founder, Director of Programming**

CFA Society Los Angeles

Women's Member Community Chair

I have worked my entire career in the financial industry and absolutely love it. As the daughter of immigrants who came to America for a better life, I valued my education with utmost importance. From the moment I earned a spot on the trading floor and felt the adrenaline rush, I knew that my success as a wife, mother, and professional was heavily dependent on having the 'right' people around me. When I became a financial advisor, I was proud to become that 'right' person to help others achieve financial success.

To my disappointment I realized the industry has greatly underserved women, and even I was guilty of making compromises along my journey to adjust to a relentless and demanding culture. My passion to serve women and families looking for a better financial experience led me to start doing things differently. Today, my firm Refresh Investments is dedicated to serving professional women and their families. We offer a unique approach creating an environment for clients to comfortably discuss their issues, and help them make financial decisions with clarity and confidence.

The goal of creating an inclusive space for financial professionals is vital to the success of our community. Our clients want to see professionals that mirror their own values and perspectives. I believe we can succeed with this mission by supporting one another and continuing to educate ourselves and our allies.



## MEET THE BOARD (cont.)



**Victoria (Cherkashina) Prescott, CFA**

**Associate Director**

**Capital Markets & Investor Relations at Realty Income Corporation**



**CWIM Co-Founder, Director of Advocacy**

CFA Society San Diego

Advocacy Chair

Being an immigrant, I know first-hand how important it is to have a sense of inclusion and belonging. I have always felt that I can more easily relate to minority groups, because I know how it feels to be different, to speak a different language, to grow up in a different environment and receive a different education. Having moved to the U.S. from Kazakhstan about eight years ago, I had to build my personal and professional networks, which was not an easy task. Women generally lack the natural mentorship and sponsorship that tends to take place at the middle and senior levels, which means that they need to work so much harder to establish their own support network. I joined the Collaborative WIM to help thousands of women across the world to grow their professional networks and provide resources to help them get to the next level of their personal and professional adventures.

To me, diversity is a state of mind and a way to evolve. As human beings we grow when we learn new perspectives, experience new cultures, evaluate new view points, and we succeed when we adopt an inclusive mindset.



# COLLABORATIVE WIM

## WHAT

CFA Societies, FPA Chapters and industry groups around the world have joined efforts to further our shared vision of inclusion and diversity in capitalism. This collaboration was created to demonstrate the commitment of the global finance community to inclusion and diversity, and to support the advancement and development of female leaders of all backgrounds.

This is a global grassroots campaign:

- **To create** demand for diversity
- **To empower** female and diverse professionals across all facets of the finance industry
- **To establish** a global community to share resources, information and best practices to promote our shared vision of a better, more inclusive world

## WHY

We believe that inclusion and diversity will allow our industry to achieve better investment outcomes-- but more importantly, we believe that it will better serve our diverse society.

The inclusion conversation has never been more urgent, and the reality remains that there are few female and diverse professionals in senior leadership roles. As a result, these professionals often lack the natural mentorship and sponsorship that tends to take place at the middle and senior levels, necessitating that they work harder to establish their own support network. Our global collaboration intends to fulfill that need.

**Women, as the minority in the finance industry globally, are the universal diversifier.**

By utilizing virtual programming and our global network, our community facilitates a geography-agnostic exchange of ideas, resources and best practices to amplify and enhance the diversity dialogue, wherever it is taking place.

We aid each professional in their personal career journey, through professional development and networking opportunities. In time, we hope that our efforts will both inspire and expand the female and diverse talent pipeline into the investment industry, as well as support their success.

Together, alongside our like-minded supporting organizations, our collaboration demonstrates the commitment of the global finance industry to inclusion and diversity, while providing high-caliber programming, cross-regional networking and professional development opportunities for our global community.

Our collaboration:

- **Creates** a unique **CWIM Original** program series that provides exceptional professional development guidance and showcases talented, diverse female leaders
- **Co-markets** high quality I&D programming created by our participating societies to bring added visibility to the featured speakers and the societies who host them
- **Showcases and amplifies** across our global platform the I&D efforts of our participating societies, to aid their success and build momentum for those initiatives at the local, regional and global level
- **Offers** valuable networking opportunities for our global base of finance professionals of all backgrounds
- **Provides** young professionals of all backgrounds access to critical mentorship and career guidance through internship opportunities and mentor programs
- **Supports** the development, hiring and advancement of the diverse talent pipeline

## WHO

Our grassroots campaign has captured hearts and minds across the global finance network, and leaders around the world have dedicated their talents, time and endless passion to our shared vision. As of April 30, 2021, our global collaboration comprises ~80 organizations across the the US, Canada, Caribbean, EMEA and Latin America.

Together, we aim to enhance and amplify the I&D efforts of our respective societies at the local level, while sharing resources and information to build a truly global community around this important dialogue. Participating CFA Societies and FPA Chapters alongside Collaborative WIM believe that we can achieve more by working in conjunction, rather than in isolation.

## COLLABORATIVE WIM 2021 SPONSORS

Thank you to the generous leaders of the finance industry who share our vision for a better, more inclusive world and work tirelessly alongside us to make it a reality. We are proud to ally with these global thought leaders to shape the inclusion and diversity conversation.

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### "ON THE SAME PAGE" WIM BOOK CLUB SPONSORS

SUMMER

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## OUR INAUGURAL EVENT

Our inaugural collaborative event on September 29, 2020 (hosted by the Women's Network of CFA Society Chicago) was the first in a series of programs designed to celebrate female leaders and inspire young professionals.

CFA Society and FPA members around the US joined us for a candid conversation with Stephanie Cohen, Chief Strategy Officer of Goldman Sachs.

The graphic is a dark blue rectangular banner with white and light blue text. In the top left corner, a white box contains the text 'COLLABORATIVE WOMEN IN INVESTMENT MANAGEMENT SERIES'. The main title 'M&A AND THE COVID-19 IMPACT: CRISIS OR OPPORTUNITY?' is in large, bold, white capital letters. Below the title, 'INTERACTIVE WEBINAR' is written in bold white letters, followed by the date and time 'TUESDAY, SEPTEMBER 29 5PM EST | 4PM CST | 2PM PST'. On the right side, a white box contains the word 'FEATURING' in bold, followed by a circular headshot of Stephanie Cohen and her name 'STEPHANIE COHEN' in bold, with her title 'CHIEF STRATEGY OFFICER GOLDMAN SACHS' below it. At the bottom, a white box contains the text 'COLLABORATIVE WOMEN IN INVESTMENT MANAGEMENT (WIM) SERIES FACILITATED BY CFA SOCIETIES IN: ATLANTA | CHICAGO | CLEVELAND | INDIANAPOLIS | LOS ANGELES | MINNESOTA | NEW MEXICO | OKLAHOMA | ORANGE COUNTY | ORLANDO | PHOENIX | PORTLAND | SAN DIEGO | SEATTLE & WITH FPA CHAPTERS IN: INDIANAPOLIS | ORANGE COUNTY | SAN DIEGO'.

COLLABORATIVE WOMEN IN INVESTMENT MANAGEMENT SERIES

**M&A AND THE COVID-19 IMPACT: CRISIS OR OPPORTUNITY?**

**INTERACTIVE WEBINAR**  
TUESDAY, SEPTEMBER 29  
5PM EST | 4PM CST | 2PM PST

**FEATURING**

 **STEPHANIE COHEN**  
CHIEF STRATEGY OFFICER  
GOLDMAN SACHS

COLLABORATIVE WOMEN IN INVESTMENT MANAGEMENT (WIM) SERIES FACILITATED BY CFA SOCIETIES IN: ATLANTA | CHICAGO | CLEVELAND | INDIANAPOLIS | LOS ANGELES | MINNESOTA | NEW MEXICO | OKLAHOMA | ORANGE COUNTY | ORLANDO | PHOENIX | PORTLAND | SAN DIEGO | SEATTLE & WITH FPA CHAPTERS IN: INDIANAPOLIS | ORANGE COUNTY | SAN DIEGO

Just earlier in the day, Goldman announced that Stephanie would co-run the bank's consumer banking and wealth management practice, marking the first time in years that a woman will run a major division. In addition to being the youngest member of the firm's management committee, this move also designates Stephanie as a possible successor for the CEO role.

Stephanie shared with us everything from her reflections on her early days in Chicago as a competitive figure skater, to her most memorable investment banking deals, to her enthusiasm for the GS Accelerate and Launch with GS programs as platforms to foster innovation and diversity and the importance of establishing a personal board of directors in our respective career journeys.

Thank you for helping us to celebrate this incredible female leader in our inaugural event.

The following pages outline upcoming WIM Original events and additional programming provided by Collaborative WIM and its participating societies globally.

## UPCOMING CWIM ORIGINAL EVENTS



**COLLABORATIVE WIM PRESENTS**  
**ON THE SAME PAGE: WIM QUARTERLY BOOK CLUB**

**"REACH: A NEW STRATEGY TO HELP YOU STEP OUTSIDE YOUR COMFORT ZONE, RISE TO THE CHALLENGE, AND BUILD CONFIDENCE"**

**LIVE Q&A WITH THE AUTHOR**  
**THURSDAY, OCTOBER 13**  
**EMEA: 5:00PM LONDON**  
**AMERICAS: 4:00PM EST**

**HOSTED BY:**  
CFA Society Istanbul  
CFA Society Edmonton

**FEATURING**  
**ANDY MOLINSKY**  
PROFESSOR  
AUTHOR  
THOUGHT LEADER

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### Q4 2021 ON THE SAME PAGE: CWIM Quarterly Book Club

Featuring Andy Molinsky

"Reach: A New Strategy to Help You Step Outside Your Comfort Zone,  
Rise to the Challenge, and Build Confidence"

13 October 2021



**CFA Society  
New York**

### Q4 2021 CWIM Original

"2022 Outlook for Women Leaders"

Hosted by CFA Society New York

18 November 2021

## UPCOMING CWIM ORIGINAL EVENTS (cont.)



**CFA Society  
Saskatchewan**



**CFA Society  
Okanagan**

### **Q1 2022 CWIM Original**

Featuring Rupal Bhansali

Co-hosted by CFA Society Saskatchewan and CFA Society Okanagan

15 February 2022

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**CFA Society  
Idaho**

### **Q1 2022 ON THE SAME PAGE: CWIM Quarterly Book Club**

**Featuring Morgan Housel**

"The Psychology of Money"

Hosted by CFA Society Idaho

19 January 2022

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**CFA Society  
Luxembourg**

### **Q2 2022 CWIM Original**

**Featuring Komal Ahmad**

Hosted by CFA Society Luxembourg

Spring 2022

## UPCOMING CWIM ORIGINAL EVENTS (cont.)

### **Q2 2022 ON THE SAME PAGE: CWIM Quarterly Book Club**

**Featuring Jared Bibler**

"Iceland's Secret: The Untold Story of the World's Biggest Con"

Spring 2022

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### **Q3 2022 ON THE SAME PAGE: CWIM Quarterly Book Club**

**Featuring Ellen Carr and Katrina Dudley**

"Undiversified: The Big Gender Short in Investment Management"

Summer 2022

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## PAST CWIM ORIGINAL EVENTS

Collaborative WIM in Partnership with Schroders Presents:  
"Break Free from Imposter Syndrome: Embrace Your Confident, Capable Self"  
Featuring Michelle Galloway, Of Counsel at Cooley  
Q1 2021 CWIM Original hosted by CFA Society Indianapolis on 3 February 2021

Collaborative WIM in Partnership with Schroders Presents:  
"The Myth of Fearlessness: Using Biopsychology to Craft Your Next, Best Steps"  
Featuring Mary Poffenroth  
Q2 2021 CWIM Original hosted by CFA Society Los Angeles on 6 May 2021

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SPONSOR

**RBC** Capital Markets

COLLABORATIVE WIM IN PARTNERSHIP WITH SCHRODERS PRESENTS:

### THE MYTH OF FEARLESSNESS

USING BIOPSYCHOLOGY TO CRAFT YOUR NEXT BEST STEPS

INTERACTIVE WEBINAR & NETWORKING

THURSDAY, MAY 6: 4PM ET / 1PM PT  
HOSTED BY CFA SOCIETY LOS ANGELES

#### FEATURING



**MARY POFFENROTH**

SAN JOSE STATE UNIVERSITY STEM FACULTY  
BIOPSYCHOLOGIST | AUTHOR

Click on the image to learn more about our Q2 2021 CWIM Original Event

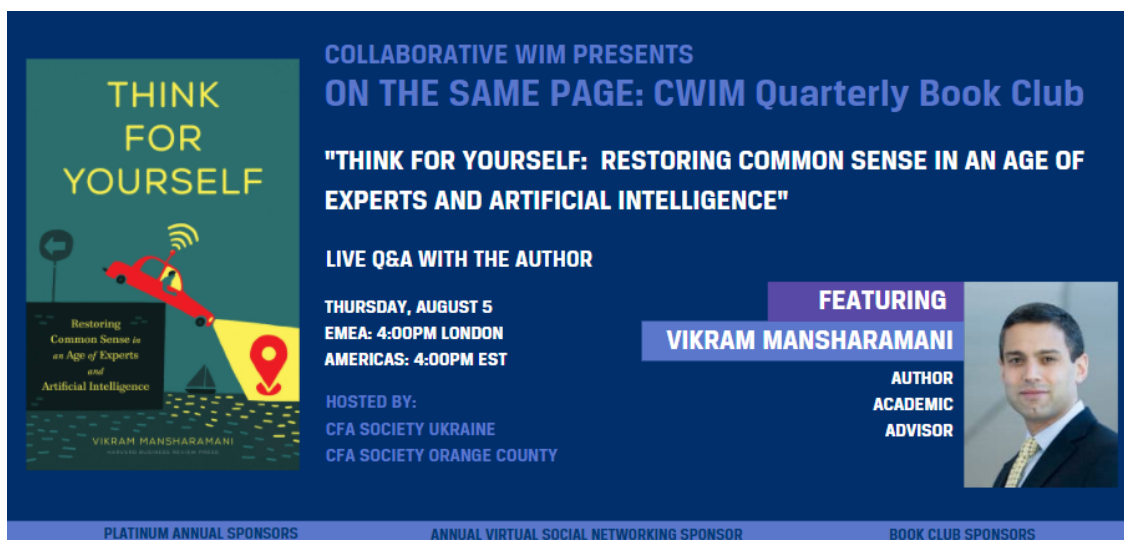
Click here to see a replay of the event: [REPLAY](#)

## PAST CWIM ORIGINAL EVENTS

### Q3 2021 ON THE SAME PAGE: CWIM Quarterly Book Club

Featuring Vikram Mansharamani

"Think for Yourself: Restoring Common Sense in an Age of Experts and Artificial Intelligence"



The poster is for a book club event. On the left is the book cover for "Think for Yourself: Restoring Common Sense in an Age of Experts and Artificial Intelligence" by Vikram Mansharamani. The cover features a red car with a Wi-Fi symbol on its roof, driving on a road that leads to a red location pin. The text on the poster includes: "COLLABORATIVE WIM PRESENTS ON THE SAME PAGE: CWIM Quarterly Book Club", "THINK FOR YOURSELF: RESTORING COMMON SENSE IN AN AGE OF EXPERTS AND ARTIFICIAL INTELLIGENCE", "LIVE Q&A WITH THE AUTHOR", "THURSDAY, AUGUST 5", "EMEA: 4:00PM LONDON", "AMERICAS: 4:00PM EST", "HOSTED BY: CFA SOCIETY UKRAINE, CFA SOCIETY ORANGE COUNTY", "FEATURING VIKRAM MANSHARAMANI", "AUTHOR, ACADEMIC, ADVISOR", and a portrait of Vikram Mansharamani. At the bottom, it lists sponsors: "PLATINUM ANNUAL SPONSORS", "ANNUAL VIRTUAL SOCIAL NETWORKING SPONSOR", and "BOOK CLUB SPONSORS".

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Click on the image to learn more about our inaugural global book club event

Click here to see a replay of the EMEA event: [REPLAY](#)

Click here to see a replay of the Americas event: [REPLAY](#)

## PAST CWIM ORIGINAL EVENTS (cont.)

Collaborative WIM in Partnership with Schroders Presents:  
Women, Money & Power, Featuring Marilyn Wechter, Moderated by Déla Hoyi  
Q3 2021 CWIM Original hosted by CFA Society Oklahoma on 9 September 2021

**COLLABORATIVE WIM IN PARTNERSHIP WITH SCHRODERS PRESENTS**  
**MONEY AND ITS MIND GAMES: WOMEN, MONEY & POWER**

**INTERACTIVE WEBINAR & NETWORKING**  
THURSDAY, SEPTEMBER 9: 1PM PT / 4PM ET  
HOSTED BY CFA SOCIETY OKLAHOMA

**FEATURING**  
**MARILYN WECHTER**  
PSYCHOTHERAPIST, FINANCIAL THERAPIST, WEALTH COUNSELOR

**MODERATED BY**  
**DÉLA HOYI**  
SR. ADVISOR AND ECONOMIST  
TREASURY BOARD OF CANADA SECRETARIAT

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Click on the image to learn more about our Q3 2021 CWIM Original Event

Click here to see a replay of the event: [REPLAY](#)

## JOIN OUR GLOBAL COMMUNITY

Visit our official website at [www.CollaborativeWIM.com](http://www.CollaborativeWIM.com)

Join the conversation, and receive updates on the latest news and events!



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## APPENDIX: COLLABORATIVE WIM SUPPORTED EVENTS

"M&A and the COVID-19 Impact: Crisis or Opportunity?" with Stephanie Cohen, Chief Strategy Officer of Goldman Sachs (hosted by CFA Society Chicago on 29 September 2020)

"Gender Gap Investing" with Nannette Hechler-Fayd'herbe, Chief Investment Officer of International Wealth Management and Global Head of Economics & Research of Credit Suisse (hosted by CFA Society Switzerland on 3 December 2020)

"Hack Your Own Brain" with Dr. Karolien Notebaert, Founder of One-Step Ahead, Notebaert Consulting (hosted by CFA Society Indianapolis on 12 January 2021)

"The 10 Marketing Tools You Never Knew You've Always Needed" with Sheryl Hickerson, CEO, Females and Finance (hosted by FPA Austin on 12 January 2021)

Women in Finance Series with Dr. Anja Hochberg, Head of Multi Asset Solutions for Swisscanto Invest by Zürcher Kantonalbank (hosted by CFA Society Switzerland on 21 January 2021)

"Secrets of Wealthy and Successful Women" with Veronica Dagher, Co-Creator, Wall Street Journal Podcast Series: Secrets of Wealthy Women (hosted by Women Investing in Security and Education on 26 January 2021)

"Trading vs. Investing and the Influence of Fintech" with Tricia Rothschild, CFA, President of Apex Clearing (hosted by CFA Society Chicago on 10 February 2021)

"Lessons in Leadership & Forging a New Way" with Kris Williams, President & CEO of FHLB Des Moines and Jeff Whitehead, Chief Investment Officer of Farm Bureau Financial Services (hosted by CFA Society Iowa on 19 February 2021)

"Driving Change: Diversity and Inclusion in Investment Management" with Nicole Robinson, McKinsey & Company Engagement Manager and Women in the Workplace 2018 co-author (hosted by CFA Society Hawaii on 10 March 2021)

## APPENDIX: COLLABORATIVE WIM SUPPORTED EVENTS (cont.)

"COVID-19 Vaccines, Treatments, and Undervalued Biopharma" with Karen Andersen, CFA, Healthcare Strategist with Morningstar (hosted by CFA Society Detroit on 16 March 2021)

"Advancing Diversity & Inclusion Outcomes: Measurable Steps to Create Lasting Change" with Orlando L. Williams, CEO of Motus Staffing and Recruiting as Keynote Speaker & Moderator and Sarah Maynard, Global Head of External Inclusion & Diversity Strategies and Programs of CFA Institute as Special Guest (hosted by CFA Society Portland on 18 March 2021)

"Emerging Managers: The Women's Panel" with Cynthia Steer, Chairperson, Advisory Committee of Exagon Capital, Pat Zollar of Neuberger Berman, Suzanne Yoon, Founder of Kinzie Capital, and Christina Drake of Fund Evaluation Group (hosted by CFA Society Dallas-Forth Worth on 29 March 2021)

"A Data-Driven Lens on Diversity and Inclusion" with Erika Spence, Global Head of Data Strategy, eVestment, Christopher J. Ailman, Chief Investment Officer of CalSTRS, Gretchen O'Hara, Vice President, AI & Sustainability Strategy at Microsoft, Paolo Gaudiano, Ph.D., Co-Founder & Chief Scientist of Aleria, and Susan Reid, Global Head of Diversity and Inclusion of Morgan Stanley (hosted by CFA Society New York on 30 March 2021)

"Sherron Watkins: Leadership and Ethics Advocate" with Sherron Watkins, former Vice President of Corporate Development at the Enron Corporation and Enron Whistleblower (hosted by CFA Society Alabama on 15 April 2021)

Women in Finance Series with Sinikka Demaré, CFA, Independent and Strategic Advisor and Board Member (hosted by CFA Society Switzerland on 15 April 2021)

"Rich Thinking" with Barbara Steward, CFA, Author of the Rich Thinking Global Research Papers (hosted by CFA Society Columbus on 5 May 2021)

## APPENDIX: COLLABORATIVE WIM SUPPORTED EVENTS (cont.)

"A Discussion on Diversity and Inclusion in the Asset Management Industry" with Donna Milrod, Executive Vice President and Global Head of Asset Managers of State Street, Marcia Rothschild, Head of Latin America and the Caribbean of State Street, and Christina Worley, Founder and Managing Member of Castle Wealth Management (hosted by CFA Society South Florida on 17 May 2021)

"Go with the Flo" With Tricia Griffith, President and CEO of Progressive Insurance (Hosted by CFA Society Cleveland on 19 May 2021)

Women in Finance Series with Maria Teresa Zappia, Chief Impact and Blended Finance Officer, Deputy CEO at BlueOrchard Finance Ltd (Hosted by CFA Society Switzerland on 20 May 2021)

"Currency Investing: Sources of Risk and Return" with Philip Clements, CFA, CAIA, Associate Director, Record Currency Management Inc., moderated by Kartik Ghia, Systematic Strategist, Bloomberg with panelists: Galen Haws, CFA, CAIA, Director of Portfolio Management (OCIO), Verus Investments; Kristjan Kasikov, Global Head of CitiFX Quantitative Investor Solutions, Citi; Leah Traub, PhD, Partner, Portfolio Manager, Lord Abbett; and Mee Warren, CFA, CAIA (hosted by CFA Society New York on 27 May 2021)

"A Discussion on ESG Investing" with Liz Simmee, Co-Founder of Honeytree Investment Management (Hosted by CFA Society Rochester on 16 June 2021)

Women in Finance Series with Florence Schnydrig Moser, Head Private Banking at Zürcher Kantonalbank and Board Member at Advance – Gender Equality in Business, moderated by Laura Prina Cerai, CFA (hosted by CFA Society Switzerland on 17 June 2021)

CEE Regional Conference: Industry Landscape on Farmland Investing, featuring Martin Davies, President & CEO of Westchester; Alex Lissitsa, CEO of IMC, President of Association "Ukrainian Agribusiness Club"; Austin Crites, CFA, CIO of Aurora Financial Strategies and moderated by Nataliia Shpygotska, CFA, Senior Analyst at Dragon Capital (Hosted by CFA Society Ukraine on 30 June 2021)

## APPENDIX: COLLABORATIVE WIM SUPPORTED EVENTS (cont.)

What's Next for US Equities?" featuring Jill Hall, CFA, CFA, Head of US Small and Mid-Cap Strategy at Bank of America (Hosted by CFA Society San Diego on 15 July 2021)

Women in Finance Series with Dame Fiona Kendrick, Chair of PWC Public Interest Body, Deputy Chair of the Institute for Apprenticeships Board, former Chairman and CEO of Nestlé UK&I (Hosted by CFA Society Switzerland on 15 July 2021)

Women in Finance: The Value of Credentials, Featuring Kristen Schriver, Recruiter/Owner, Investment Management Recruiting and Vanessa Wieliczko, CFA, CFP, CAIA, CIO/Partner, HoyleCohen Wealth Management (Hosted by CFA Societies San Diego, Los Angeles & Seattle on 19 August 2021)

"Advance your Career: Opportunities in FinTech for Capital Markets" (Hosted by CFA Society San Francisco on 31 August 2021)

Women & Finance Knowledge Circle Event, Featuring Beverly D. Flaxington (Hosted by FPA Michigan on 15 September 2021)

Women in Finance Series with Scilla Huang Sun, Head of Equities, Group Asset Management at Swiss Re (Hosted by CFA Society Switzerland on 16 September 2021)

"Inspiring Female Role Models in Finance: How did they get there?" with Carole Crawford, CFA, Managing Director of the Americas Region, CFA Institute; Dagmara Fijalkowski, CFA Head of the Global Fixed, Income and Currencies, RBC GAM; Jasmine N. Richards, CFA Head of Diverse Manager Research; Cambridge Associates (Hosted by CFA Society Ottawa on 23 September 2021)

Career Development Series with Kristen Schriver (Hosted by CFA Society San Francisco on 23 Sept / 21 Oct / 11 Nov / 9 Dec 2021)

"Investment and Career Perspectives from Powerful Women in Finance" with Yana S. Barton, CFA, VP, Director of Specialty Solutions, Eaton Vance; Sarah Ketterer, CEO, Causeway Capital Management; Sonali Pier, Managing Director, PIMCO (Hosted by WISE on 26 October 2021)



## APPENDIX: COLLABORATIVE WIM SUPPORTED EVENTS (cont.)

"Using DEI to Strengthen Your Portfolio" with KC Connors, CFA, CAIA, Partner at NEPC, LLC (Hosted by CFA Society Minnesota on 14 October 2021)