



Virtual Diversity & Inclusion Journey

In lieu of its day-long annual D&I conference which was postponed in March 2020, CFAP's Women's Leadership Initiative is hosting a virtual "Diversity Journey." Beginning on September 22, this journey will feature 8 weekly hour-long lunch time sessions (noon – 1 pm ET). The conference will include a variety of panelists, fireside chats and breakout room discussions addressing various elements of diversity, including gender and racial diversity, among other components. The conference will utilize Zoom technology. Registrants will be sent a link to the webinar in a separate e-mail after registering.

Agenda

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| Tue 9/22 | 1. Bringing Diversity, Inclusion & Belonging to Our Workforce

Learn from a panel of Chief Diversity Officers about what they are doing in their organizations to enhance the diversity and inclusion in their work environments.

Moderator: Mia Fioravanti, FS Investments
Crystal Hardie-Langston, Vanguard
Deidra Jenkins, Northern Trust
Bonnie Levitt, PFM |
| Thu 10/1 | 2. What Inclusion and Belonging Mean to You

After a short introduction to the concepts of inclusion and belonging, you will have the chance to engage in candid group breakout discussions on these topics. This will also provide an opportunity for meeting people with differing backgrounds with whom to share ideas and network.
Optional Pre-/Post-Read for additional information on the topic . |
| Wed 10/7 | 3. Starting Early to Change the Face of Wall Street

Fireside chat with Maura Cunningham, Rock the Street, Wall Street (RTSWS)
Moderator: Leslie Theodosopoulos, CFA, Vanguard

As the founder and CEO of Rock the Street, Wall Street, Maura Cunningham is helping girls view math-focused fields of study as compatible with a career that has a positive impact on the world. RTSWS sparks girls' enthusiasm for finance at a critical age and makes them aware of the societal benefits, personal financial knowledge and math-oriented careers can have. |
| Thu 10/15 | 4. Say This, Not That

Inclusive language reflects a broad range of identities and perspectives that does not stereotype or demean people based on implicit bias and perceptions of personal characteristics or cultural background. This workshop will focus on supporting your black workforce, raising awareness of inclusive language and practicing identifying non-inclusive language. The goal is to have an appreciation for word choice, and recognition that the words we use have implications to the people in our professional and personal relationships. |

Naomie Jeantine, Deloitte Consulting, Inc.

Tue 10/20 5. The Impact of Diversity on Investment Management

Hear first-hand from three women investment professionals on their journeys in the investment management industry. What issues impacted them along the way and what have they learned? How have they taken these learnings to make a difference for themselves and others?

Moderator: Natalie Marvi-Romeo, CFA
Joyce Li, CFA, Matthews Asia
Jackie Rantanen, Hamilton Lane
Floyd Simpson, CFA, PFM Asset Management

Thu 10/29 6. Fireside chat with Lyle Logan

Lyle Logan serves as Managing Director of the Financial Institutions Group at Northern Trust. Learn more about Lyle's journey and how he thinks about building diverse teams.

Lyle Logan, Northern Trust
Moderator: Melissa Novak, CFA, Northern Trust

Tue 11/10 7. Diversity Takes Many Forms - Military and Veterans

Diversity encompasses more than race, gender, sexual orientation among other distinctions. Two federal laws prohibit discrimination in employment based on one's status as a veteran or service member. During the week of Veterans Day, we focus on the military and veterans as we learn from veterans working in the financial services industry.

Moderator: Jill Malandrino, NASDAQ
Won Palisoul, CFA, CFA Society New York
Cauldon D. Quinn, Bancroft Capital
Craig T. Schorr, CFA, Alliance Bernstein

Wed 11/18 8. On Connecting

Broad Street Consulting Group provides proven sales strategy, coaching, sales search and marketing services to financial institutions. The firm is a women-owned business committed to diversity recruiting. Over 60% of placements by Broad Street have been diverse hires. As you navigate your career and job searches, this session will focus on connecting.

Margot DeMore and Milena Humplik, Broad Street Consulting Group