



Wealth and Finance Career Conference

Wednesday April 22, 2026 | 9:00 AM – 1:30 PM

UW - Alder Hall 1315 NE Campus Parkway, Seattle 98105

Time	Event
8:30 –9:00 AM	Check-in & networking
9:00 –9:10 AM	Welcome & Conference Kickoff by WE Leadership Elizabeth Anderson , Regional Manager & Director, AllianceBernstein Karen Beaudry – Manager, Career Services & Employer Relations, UW Computational Finance and Risk Mgt
9:10 AM –10:00	Panel Discussion “A View from the Top” – CEO’s share leadership experiences. <ul style="list-style-type: none"> • Moderator: Amelia Holland, Country Head, Citywire USA • Kristen Bauer – CEO, Laird Norton Wetherby • Julie Parisio Roy, CFA, CFP – CEO, Badgley Phelps • Shilo Lockett – President, Comprehensive Wealth Management • Nelly Mubashi – CEO, Northwest Asset Management
10:00 AM – 10:30	Keynote Fireside Chat Introduction by Ramiro Higuera Moderator: Christine Cherry – Head of Partnerships, Future Proof Anna Paglia EVP, Chief Business Officer, State Street Investment Management
10:30 AM –11:20	Panel Discussion “Perspectives from Investment Leaders” <ul style="list-style-type: none"> • Ann Gookin – Partner, Managing Director, Freestone Capital Management • Brandy Niclai, CFA – CIO, Multi-Asset Strategies, Alaska Permanent Capital Management Co., • Evgenia Gvozdeva, PhD - Managing Director, Head of Research, Russell Investments • Michelle Walker, CFA – CIO, Moss Adams
11:20 AM – 11:30	Break
11:30 AM –12:00	Featured Speaker Introduction by Amelia Holland Erica Coogan , former Head of Wealth Management, Moss Adams
12:00 PM -12:30	Lunch and Networking
12:30 PM-1:15	Break Out Sessions – attendees may continue enjoying lunch <ul style="list-style-type: none"> • CFA Society - Laura Foster, CFA, Franklin Templeton; Sharon Kim, Dir Global Partnerships, CFA Institute - Alder Auditorium • Investment Operations - Lisa Cook, Partner, Waverly Advisors, Kim Evermon, Northwest Asset Management, Onboarding Manager, Grace Rollins, Fortis Financial Group, Director, Business Development- Alder 107 • CAIA Northwest- Alder 105 • FPA Puget Sound - Alder 106
1:15-1:30 PM	Closing Remarks Introduction – Karen Beaudry Victoria Tucker , Vice President, Talent Acquisition, Virtus Investment Partners