We used to gaze at the Moon and wonder what was possible. Soon we’ll gaze back at Earth and wonder what’s next. Because optimism is our most valuable natural resource. So embrace the companies that defy the expected. 

Go farther to find where long-term opportunities hide. Invest in tomorrow, because that’s where the big ideas live. And that’s the right way to invest in this big, bold, beautiful world. Or wherever else we may happen to go.

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AGENDA

8:00  Registration and Continental Breakfast

8:15 – 8:30  Welcome

Lucy Momjian, CFA, Conference Chairperson
Robert Norton, CFA, President, CFA Society Philadelphia

8:30 – 9:15  General Session: Unconscious Bias Explained

Introduction: Beth Stone, CFA, Vanguard
Kimberly S. Reed, Reed Development Group


Introduction: Leslie Theodosopoulos, CFA, Vanguard
Lauren Foster, CFA Institute

10:10 – 10:30  Break

TRACKS: Track A is oriented to investment and professional growth topics. Attendees are encouraged to switch tracks throughout the day.

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10:30 – 11:20  TRACK A: Driving Diversity & Inclusion in Human Resources

   Moderator: Karen Bater, CFA, Aberdeen Standard Investments
   John James, Vanguard
   Gina Moore, CFA, AJO
   Ryan Paczkowski, Glenmede
   Trish Grayauskie, Aberdeen

   TRACK B: Bringing Diversity to the workforce – Millennials and Gen Z

   Moderator: Azy Kiai, OppenheimerFunds
   Raquel Arredondo, Drexel University
   Cindy Axelrod, CFA, Temple University
   Cindy Esparragoza, Girls Who Invest
   Nora Moffat, Academy of Notre Dame de Namur

11:25 – 12:15  TRACK A: Women as Clients

   Introduction: Jennifer Bravo, CFP, Entrust Financial
   Lisa Kueng, Invesco

   TRACK B: The Importance of Male Mentors

   Moderator: Christine McGovern, CFA, CFP, Vanguard
   Ralph Bassett, CFA, Aberdeen Standard Investments
   Amber Czonstka, Vanguard
   Ralph Giraud, Rutgers University Camden
   Nikki Kraus, CFA, Strategic Investment Group

12:30 – 2:00  Lunch and Keynote Speaker

   Introduction: Brittany Flaherty, CFA and Lucy Momjian, CFA, Vanguard
   Meredith Jones, Author of "Women of The Street: Why Female Money Managers Generate Higher Returns (And How You Can Too)"

2:10 – 3:00  TRACK A: Gender Lens and Impact Investing

   Moderator: Terrie Liu, OppenheimerFunds
   Kelly Coyne, Pax Ellevate Management
   Julia Enyart, Glenmede
   Jasmine Richards, CFA, Cambridge Associates
   Floyd Simpson, CFA, CFP, FIS Group

3:10 – 4:00  TRACK A: The Importance of Diversity in Investment Management

   Moderator: Tracy Musser, Thompson, Siegel & Walmsley
   Sandra Ackermann-Schauffler, CFA, SEI
   Anne Mathias, CFA, Vanguard
   Sharon Hill, Macquarie
3:10 – 4:00  TRACK B: Getting to the C-Suite
Moderator: Peggy Flynn, CFA, American Water
Ellen Cooper, CFA, FSA, Lincoln Financial Group
Karen Kosiba Edwards, CFA, Boyden Executive Search
Amira Strasser, Applied Research Investments

4:00 – 5:00  Networking Reception

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CFA Society Philadelphia is grateful to CFA Institute for its support of our diversity and inclusion initiatives.
Scan to see the recent CFA Institute report, "Diversity and Inclusion: Driving Change in Investment Management".
Cindy Axelrod, CFA
Assistant Professor of Practice
Finance Department, Fox School of Business
Temple University

Cindy Axelrod joined the Fox School of Business in 2013 as an Assistant Professor in the Finance Department. Prior to joining Fox, Ms. Axelrod was a Senior Securities Analyst and Investment Professional with over 25 years experience in equity analysis and portfolio management. She has a successful track record of investing client assets utilizing value, growth, and GARP investment disciplines across all market capitalizations. Ms. Axelrod is accomplished in equity analysis, with a sharp focus on the ability to assess important and timely business trends as they relate to corporate balance sheets, income statements, and cash flow statements.

Sandra Ackermann-Schaufler, CFA
Senior Portfolio Manager, Investment Management Unit - International and Emerging Markets Equity Investment Strategies Group
SEI

Sandra Ackermann-Schaufler serves as a senior portfolio manager within SEI's Investment Management Unit, covering global, international and emerging-market equities. She is responsible for managing portfolios as well as overseeing research, selection and ongoing evaluation of global, international and emerging-market equity managers within the SEI Funds.

Raquel Arredondo
Associate Director for Outreach, Engagement & Professional Development
Drexel University's LeBow College of Business, Office of Graduate Career Services

In her role, Raquel drives initiatives and strategies in order to develop relationships with employer partners, and to connect students and faculty with co-curricular, internship, and employment opportunities.

Dedicated to issues that impact diversity, women, and wellness, Raquel has been recognized by the National Association of Latino Professionals-Prospanica with the 2018 Brillante Award, and in 2017 AL DIA News Media awarded her the Woman at the Top Award.

Ralph Bassett, CFA
Deputy Head of North American Equities
Head of US Small & Mid Caps
Aberdeen Standard Investments

Ralph Bassett is Deputy Head of North American Equities and Head of US Small and Mid-Cap Equity at Aberdeen Standard Investments. Ralph has co-led the firm’s Small Cap strategy since its inception over a decade ago and helps manage the teams wider investment research effort that oversees roughly $20 billion of AuM in total. Ralph joined ASI in 2006, after having worked in management consulting. Ralph earned a BS in Business, Finance (Hons) from Villanova University. He is a CFA charterholder.
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Ellen Cooper, CFA, FSA

Executive Vice President and Chief Investment Officer
Lincoln Financial Group

Ellen Cooper is executive vice president and chief investment officer for Lincoln Financial Group and is a member of the company’s Senior Management Committee.

Cooper is responsible for setting, implementing and providing strategic oversight and management of Lincoln’s investment strategy.

She serves as the primary investment officer on all investment related matters to the Board of Directors and senior management team.

Kelly Coyne

Vice President, Global Women’s Strategies
Impax Asset Management LLC and Pax Ellevate Management LLC

Kelly Coyne is Vice President, Global Women’s Strategies at Impax Asset Management LLC and Pax Ellevate Management LLC. Kelly is responsible for national sales and marketing initiatives related to the Pax Ellevate Global Women’s Leadership Fund.

She also helps financial advisors build their practices and better engage and serve the next generation of clients through the firm’s Millennials & Money practice management initiative.
Amber Czonstka
Principal and Head, Institutional Large Market Sales
Vanguard

Amber Czonstka is a principal and head of Institutional Large Market Sales where she leads a team of Sales Executives responsible for establishing and maintaining relationships with institutional asset management and retirement plan clients, prospects, and consultants.

Prior to leading Institutional Large Market Sales, she led communication consulting for retirement plans at Vanguard and Vanguard’s retirement plan education meetings team.

Julia Enyart
Impact Research Analyst
Glenmede

Julia Enyart is a research analyst specializing in impact-related investments for Glenmede. She is responsible for evaluating and providing analysis on impact-oriented investment opportunities in global public markets. In her role with Glenmede, she specializes in gender lens investing and recently authored a primer around gender smart investment strategies for colleges and universities through the Intentional Endowment Network.

Prior to joining Glenmede, Ms. Enyart served as an investment associate for the Palladium Group, an impact investing and advisory firm. In this role, she advised the International Finance Corporation on scalable business solutions for low-income countries.

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Cindy Esparragoza
Academic Outreach Program Manager
Girls Who Invest

Cindy Esparragoza is the Academic Outreach Program Manager for Girls Who Invest. In this capacity, she heads its admissions and recruiting processes by bringing her years of project management, change management and process analysis experience to the role. Motivated to help women gain access to asset management, she designed and implemented the outreach program to create and maintain relationships with target colleges and universities and student groups.

Ralph Giraud
Instructor of Professional Practice – Finance,
Financial Markets Lab Manager
Rutgers University School of Business – Camden

Ralph Giraud is an Instructor of Professional Practice – Finance, and the Financial Markets Lab Manager, for the Rutgers (University) School of Business – Camden (RSBC). He is a Faculty Advisor to the RSBC student organization Rutgers Women of Business Alliance. In addition, he is a Member of the Rutgers University – Camden CIED (Committee on Institutional Equity and Diversity), and he represents RSBC as a Member of the Rutgers University Senate serving on its Student Affairs Committee. His former professional roles have included fixed income portfolio management, trading and sales.

Lauren Foster
Director, CPD Content Americas and Co-Lead, Women in Investment Management initiative
CFA Institute

Lauren Foster is Director, CPD Content Americas and co-lead of CFA Institute's Women in Investment Management initiative. Previously, she worked as a freelance writer for Barron's and the Financial Times. Prior to her freelance work, Lauren spent nearly a decade on staff at the FT as a reporter and editor based in the New York bureau. Lauren holds a BA in political science from the University of Cape Town, and an MS in journalism from Columbia University.

Trish Grayauskie
Human Resources Business Partner for the Americas
Aberdeen Standard Investments

Trish Grayauskie is a Human Resources Business Partner for the Americas at Aberdeen Standard Investments. She manages the full employee lifecycle for specific areas of the business and delivers the HR strategy and projects as determined by the Senior Management Team. In addition, she is a member of the Diversity and Inclusion Committee for the Americas and supports the development of initiatives and programs aligned to Global Diversity and Inclusion Strategy.
Sharon Hill
Senior Vice President, Head of Quantitative Equity
Macquarie Investment Management, Americas

Dr. Sharon Hill heads the firm’s equity quantitative research team in the Americas. Dr. Hill joined Macquarie Investment Management (MIM), which includes the former Delaware Investments, in 2000 as a senior programmer/analyst within the IT department, and then moved to the equity group as a quantitative analyst in 2002 before assuming her current position in 2004. Before joining the firm, she worked as a professor of mathematics at Rowan University and as a software developer for Bloomberg, where she focused on fixed income applications.

John James
Managing Director of Global Human Resources
Vanguard

John James is chief human resources officer and managing director of Vanguard’s Human Resources division, which is responsible for talent, leadership, and culture. Mr. James joined Vanguard in 2008 and has held leadership roles in the company’s Financial Advisor Services division and overseen its Australian operations in Melbourne. Prior to taking on his current role, he was based in London as the managing director of Vanguard’s U.K. and European operations.

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Meredith Jones
Researcher, writer, blogger speaker, expert in the alternative investment industry

Meredith A. Jones is an internationally recognized researcher, writer, blogger speaker and expert in the alternative investment industry. She is the author of Women of The Street: Why Female Money Managers Generate Higher Returns (And How You Can Too), which won an Axiom Award gold medal in 2016. She is also a contributor to Institutional Investor magazine, with a featured monthly column called "The Broadside." Her bi-weekly blog appears in a variety of media outlets as well.

Nikki Kraus, CFA
Managing Director, Global Head Of Client Development
Strategic Investment Group

Nikki oversees the building of client relationships and drives the firm's marketing strategy. She has more than two decades of experience in the OCIO industry, having most recently served as Director of Institutional Business at Hirtle, Callaghan & Co., where she attracted and serviced a broad range of clients. Before that she held various positions at SEI Investments Company working with OCIO clients. She has extensive experience advising investment committees, to whom she is often asked to provide insights on best practices and governance.

Karen Kosiba Edwards, CFA
Partner
Boyden USA

Karen Kosiba Edwards is a Partner in the Washington, DC office of Boyden. She is a member of the Financial Services, Real Estate and CEO and Board Services practices. Karen has 30 years' experience in the financial services industry and is a former president of the CFA Society of Washington. Karen is a member of Women Corporate Directors which has 80 chapters worldwide and the National Association of Corporate Directors. She serves on the steering committee of Women in Technology's Leadership Foundry.

Lisa Kueng
Director of Creative Campaigns
Invesco

Lisa is a national speaker and the developer of many of Invesco’s practice-building programs including the “Your Prosperity Picture” workshop for women investors, “New Retirementality,” and “T.E.A.M. Dynamics.” She is co-author of the book, Picture Your Prosperity: Smart Money Moves to Turn Your Vision into Reality.

Lisa has been a keynote presenter at hundreds of industry conferences, as well as a Pennsylvania Treasury Department statewide tour and "The Possible Woman" Conference with Ann Richards.
Anne Mathias, CFA
Rates & FX Strategist, Fixed Income Group
Vanguard

Anne N. Mathias is the Rates & FX Strategist in the Vanguard Fixed Income Group, with a focus on global macro, interest rates, and foreign currency. She is responsible for analyzing interest rates, currency valuations, economic developments, and political risks and making longer-term strategic investments in sovereign bonds and related securities across Vanguard’s active fixed income funds.

Nora Moffat
Director of the Center for Global Leadership
Academy of Notre Dame de Namur in Villanova

Nora Moffat is the Director of the Center for Global Leadership at the Academy of Notre Dame de Namur in Villanova, a private, Catholic school for girls in grades 6-12. Since shifting from a World Religions teacher to this role in 2016, Nora has worked with all community stakeholders to establish various programs and opportunities such as the Global Citizen Scholar Program, Academic Exchange Travel Program, Global Classrooms Model, and Notre Dame’s upcoming International Sisters in STEM Symposium 2020.
Gina Moore, CFA

Principle, Portfolio Manager
AJO

Gina Marie N. Moore is a principal and portfolio manager at AJO, an institutional quant shop in Philadelphia. She began her career as a licensed CPA at Price Waterhouse and then joined Scott Paper as a pension analyst, escaping when "Chainsaw Al" Dunlap carved up the company.

She transitioned to institutional investment management, first at Brandywine Asset Management and then at Glenmede Trust. She is a CFA charterholder and served on the board of the CFA Society of Philadelphia. Gina sits in the office of the CEO and shares responsibility for firm leadership.

Ryan Paczkowski

Human Resources Manager
Glenmede

Ryan Paczkowski is a Human Resources Manager in Glenmede's Philadelphia office. In this role, he is responsible for developing and facilitating programming to engage and optimize Glenmede's employee base. This includes oversight of career development and internal movement programs, performance management, employee engagement, and retention and succession-planning strategies. With over two decades of experience in Human Resources, Mr. Paczkowski previously served in similar roles leading and coaching diverse teams of human resources professionals, contractors and administrative professionals at institutions including Wells Fargo & Co, Barclays, and Citizen's Bank.
**Floyd Simpson, CFA, CFP**

Investment Officer – Manager Research
FIS

Floyd Simpson joined FIS in September of 2012 as a Manager Research Analyst. In his current role, he is the Associate Portfolio Manager for the Global Equity Portfolio and Team Leader for the Manager Research Group. Floyd is a subject expert for Growth investment strategies and has co-authored two white papers with CEO/CIO Tina Byles-Williams. Prior to joining FIS, Floyd worked with Northern Trust where he spent 10 years in various investment and client servicing positions across their main business units.

**Amira Strasser**

Founding Partner, Chief Executive Officer
Applied Research Investments

Amira began her investment management career in 1998. She held investment management research positions for Standard Life Investments, Jarislowsky Fraser, and Sigma Capital and the New York City Comptroller’s office Bureau of Asset Management. She also founded an advisory firm with the mission of Creating Value over the long run for companies and people. During her investment career, Amira analyzed various industries including Oil and Gas, Industrials, Transportation, Pharmaceuticals and Consumer.
Pax Tandon
Author, Producer, Wellness Advocate, Teacher

Pax Tandon is an author, producer, wellness advocate, and teacher. Her book, *Mindfulness Matters*, was recently released alongside her *Mindfulness Matters* short film, which she co-produced, co-wrote, voiced and starred in. Tandon has given speeches, led workshops and sat on panels for countless schools and organizations. Tandon continues to play a significant role in the television/media space, where her face and voice frequently appear on various networks and in major publications.

WOMEN'S ADVISORY COMMITTEE

Mission
To lead and maintain a community among financial industry women professionals in the Philadelphia region by promoting the highest standard of ethics, education and professional excellence for the benefit of CFAP members and society.

Vision
We aspire to serve women members within our geographic area who seek professional development, connection and inspiration through the following activities:
• Fostering alliances with mentoring programs and networking events.
• Building knowledge with educational events featuring women speakers or speakers specializing in career development for women.
• Contributing to communities with outreach program to prepare the next generation of professionals.

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