DIVERSITY & INCLUSION SYMPOSIUM

MARRIOTT DEL MAR
THURSDAY, SEPT 26
8:00 AM–1:30 PM

COST:

Individual Pricing:
- $40—CFA Society Members
- $75—Industry Members
- $95—General Public

Group Pricing (table of 6):
- $750—Diamond Corporate Table—SOLD OUT
- $500—Ruby Corporate Table—SOLD OUT
- $350—Emerald Corporate Table
- $150—Sapphire University Table—SOLD OUT

Join us for our inaugural Diversity & Inclusion event and interact with institutional asset owners, private wealth advisors, consultants, and other investment professionals as well as employers, candidates, and students to learn more about diversity and inclusion in the investment industry while expanding your professional network. We will have expert D&I keynote speakers as well as a robust slate of interactive panels to help you better integrate diversity and inclusion into your portfolio, culture, service, products, processes, and firm.
CONFIRMED SPEAKERS

Amanda Pullinger, CFA
Chief Executive Officer
100 Women in Finance

Amanda is the CEO of 100 Women in Finance (previously 100 Women in Hedge Funds). She leads a small staff team and manages over 500 volunteer practitioners globally, overseeing the operations of the organization, which now has over 15,000 members in 23 locations. She is a former principal of Aquamarine Capital Management, where she was responsible, over a period of seven years, for managing marketing and investor relations for two private investment funds.

Lauren Foster
Women in Investment Management, CFA Institute

Lauren Foster is the former managing editor of *Enterprising Investor* 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, Foster spent nearly a decade on staff at the FT as a reporter and editor based in the New York bureau. Foster holds a BA in political science from the University of Cape Town, and an MS in journalism from Columbia University.

Machel Allen, CFA
President/CIO
Metis Global Partners

Machel is the President and Chief Investment Officer at Metis Global Partners. She leads the firm’s business strategy efforts as well as the investment team responsible for researching and managing the firm’s portfolio strategies. Machel’s investment career spans over 26 years, including ten years with Brandes Investment Partners leading the quantitative research team. She is a past president and board member of the CFA Society San Diego.

Orim Graves, CFA
Executive Director
NASP

Orim Graves, CFA is the Executive Director of the National Association of Securities Professionals (NASP), a trade association for minorities and women in the financial services industry headquartered in Washington, D.C. Over 150 companies including approximately 45 small/emerging companies in all aspects of the financial services industry are represented in NASPs membership across the U.S. including ten chapters in major financial centers.

Daryn Dodson
Managing Director
Illumen Capital

Daryn's work with impact investors, private equity funds, Fortune 100 companies, universities and foundations seeks to address the world's most pressing social and environmental problems. Daryn previously led the Special Equities Program as a consultant to the Board of the Calvert Funds, a $12 billion pioneer of the impact investing field. Calvert maintains a portfolio of more than 49 funds on five continents, representing over 950 underlying portfolio companies.

Wendy Walker, CFA
Chief Investment Officer
CA Capital Management

Wendy works with endowment & foundation clients and is a member of the firm’s Mission-Related Investing Council. Prior to joining Cambridge Associates, Wendy worked on the investment teams at Imprint Capital Advisors, focusing on socially responsible and environmental-themed fund managers, and at Parnassus Investments, integrating environmental, social and governance factors into industry and company-specific research.

DeAnne Steele, CFA
Managing Director
Bank of America Private Bank

DeAnne brings years of wealth management and leadership experience to her role with expertise in the many strategies and services within our firm to help drive impact for her clients and community. She welcomes any opportunity to share her experience and knowledge and is a frequent speaker on topics such as the global economy, financial markets, ESG (Environmental, Social and Governance), Women and Wealth and Diversity and Inclusion.

Birgit Boykin
Director, Inclusion & Diversity at BlackRock

Birgit is a Human Capital executive with deep grounding in finance and operations with a track record for developing and implementing innovative people strategies to drive profitable growth within global professional services firms. She possesses a strong cultural sensitivity through working extensively with regional leadership teams in South America, Asia, Australia and the Middle East.

Cherriise Cederqvist
VP, Emerging Managers
Prudential

Cherriise Cederqvist joined Prudential in 2013 to oversee the Emerging Manager Investment Program. Prior to joining Prudential, Ms. Cederqvist worked in various institutional sales and marketing roles at Principal Global Investors Credit Suisse Asset Management, Oppenheimer Capital and UBS Asset Management.
8:00  Check-in Opens

8:30  Welcome and Opening Remarks
Vanessa Wieliczko, CFA, CAIA, CFP®, Director of Investments, HoyleCohen & President, CFA Society San Diego
Machel Allen, CFA, President & CIO, Metis Global Partners, & Past President, CFA Society San Diego

8:40  Diversity in Investments: Where Are We Today?
Amanda Pullinger, Chief Executive Officer, 100 Women in Finance
Lauren Foster, Co-Lead, Women in Investment Management CFA Institute
Orim Graves, Executive Director, NASP and Advisory Board, CFA Institute Women in Investments

9:45  The Impact of Organizational Diversity: Decision Making, Profitability, and Talent Pools
Birgit Boykin, Director, Inclusion & Diversity, Blackrock
DeAnne Steele, CFA, CAIA, Managing Director, Bank of America Private Bank
Moderated by: Machel Allen, CFA

10:30  Hosted Refreshment Break

10:45  Diversity Within Investment Decision Making
Wendy Walker, CFA, Chief Investment Officer, CA Capital Management
Cherrise Cederqvist, Vice President- Emerging Managers, Prudential
Daryn Dodson, Managing Director, Illumen Capital
Moderated by: Machel Allen, CFA

11:45  Break & Lunch buffet opens for attendees

12:15  Facilitated Roundtable Discussions
Tables will be designated for facilitated discussions relating to the interests of various industry participants. Choose from one of 15 topics to explore over the lunch hour. Full details of table topics and expert facilitators will be available a week in advance of the symposium.

1:15  Thank You and Closing Remarks
Machel Allen, CFA, President & CIO, Metis Global Partners, & Past President, CFA Society San Diego
Stacy Love, CAE, SPHR®, PHRca®, Executive Director, CFA Society San Diego

1:30  Employer Workshop (optional)
AUDIENCE / WHY YOU SHOULD ATTEND

**portfolio managers/asset owners:** learn about the diversification benefits and best practices in emerging/diverse asset manager selection

**asset managers:** learn how to better position your investment products to meet investor/consultant requirements and expectations

**employers:** learn best practices for inclusive cultures and how to better recruit and retain diverse candidates

**students/candidates:** learn about careers in the investment profession and start building your network

**ALL ATTENDEES:** opportunities to share information and network with 150+ industry peers who are also seeking to cultivate inclusive cultures

EMPLOYER WORKSHOP *(optional—60 minute session)*

Please join us for an interactive afternoon session in partnership with the [CFA Institute](https://www.cfainstitute.org)

WORKSHOP SERIES: Diversity & Inclusion in the Investment Management Profession

**AGENDA (You must register for this portion of the event separately. Workshop runs from 1:30–2:30pm)**

- **Why Diversity Matters for the Investment Management Industry**: discuss why diversity and inclusion is important to the investment industry and why it matters to each speaker.

- **Overview of the CFA Institute Diversity & Inclusion Guide**: Review of top 20 ideas and how the list was created.

- **Best Idea for Your Firm**: Each participant selects an idea from the top 20 list that is meaningful to them and that they would like to focus on during the remainder of the workshop.

- **Small Table Discussion on Three Ideas from the D&I Guide**: Using the brainstorming worksheet, each participant will fill out the worksheet for the idea they have selected. Afterwards, each table will discuss why they are interested in the idea they selected, including ideas they would like to implement and their past experiences (failures and successes).

- **Large Group Discussion**: Each table shares with the room highlights from their table discussion.

- **Event Concludes**: with tangible action items that leadership can implement to enhance diversity and inclusivity at their firm.
CFA Society San Diego is pleased to host its first annual Diversity & Inclusion Symposium. We hope your firm will join us for this special occasion and support us at a level commensurate with your vision for our organization. As an inaugural supporter of this important initiative, we are offering the following sponsorship opportunities.

**Expected Audience:** 150+ investment industry participants including institutional allocators/asset owners (public pensions, foundations, endowments, Taft-Hartley funds, corporate and nonprofit DC and DB plans), private wealth advisors, consultants and other investment professionals as well as employers, candidates, and students.

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**UNIVERSITY TABLE HOSTS**

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* The attendee list includes the names, contact information, and email addresses of all attendees who authorize sharing of their information with third parties. Receipt of this list requires a fully executed data licensing agreement.

* Sponsors at this level are welcome to give away swag items at their display tables to encourage interaction and collect business cards from attendees. They are also welcome to do raffles or other promotions to facilitate engagement with the audience.