SPEAKERS (Listed in the order of appearance):

Monday, April 11, 2022

Welcome & Opening Remarks

Hermina “Nina” Batson  
FWA President 2021-2023

Nina is a Director and the Global Head of Internal Audit Regulatory Engagement at Barclays. With over 30 years of banking and finance experience, she has worked for MUFG, Goldman Sachs, BNP Paribas, and JPMorgan Chase. Her extensive background includes commercial paper conduit financing, compliance, tax operations, accounting, risk management, regulatory reporting, syndications, conduit administration, supply chain finance, audit-related aspects, and all types of securitization execution. Nina Batson has been an active member of the Financial Women’s Association (FWA) since 2009 and currently is the FWA’s President and Leadership Council Chair. Prior to her current role as FWA President, Nina had served as the FWA’s President-Elect, Executive Vice President, Vice President of the FWA’s Engagement and Resources Division, and Membership Chair for several years.

Nina is a Crain’s New York Business 2022 Notable Black Leader, is a recipient of Markets Choice Awards’ Women in Finance: Excellence in Social Responsibility award, holds her Series 79 and 63 certifications, and received a Bachelor of Business Administration and a Certificate in Accounting, both from Hofstra University.

Brianna Perez, FWA Signature Events Chair and Associate, Content & Distribution Strategy, Morgan Stanley Wealth Management

Brianna started her career at Morgan Stanley as a Wealth Management Rotational Analyst. Her rotations included: Wealth Management Global Investment Office (COO Team, Business Development & Content Strategy), Investment Solutions (Traditional Investment Products), and Corporate & Institutional Solutions (Reinvestment). After graduating the 2-year Analyst program, Brianna is now a Content & Distribution Strategy Associate within the Wealth Management Global Investment Office. She was also a Wealth Management Summer Analyst at Morgan Stanley supporting both the Product & Field Marketing teams. Outside of Morgan Stanley, Brianna is a part of the Financial Women’s Association. She is on the Leadership Council as Chair of Signature Events and volunteers with the Financial Backpack Committee to teach financial literacy classes to high school students. Brianna Perez graduated Summa Cum Laude from Baruch College (Class of 2019) and received a Bachelor's in Business Administration. Brianna majored in Finance and minored in Psychology. Brianna enjoys watching movies, basketball (especially the NCAA March Madness Tournament), Interior Design, fashion, and taking Zumba classes!
Social Justice in Action

**Crystal Ovalles**
Corporate Vice President, Diversity, Equity & Inclusion Center for Awareness and Advocacy – Talent Management, Human Resources
New York Life Insurance Company

Crystal joined New York Life in 2016. She serves as a Development Consultant on the Diversity, Equity & Inclusion Center for Awareness and Advocacy (DE&I Center) team. In her role, she supports employees across New York Life in driving their personal and professional development and growth. She works one-on-one with diverse employees to provide coaching and career guidance, unlocking their full potential to become their best personal and professional selves. She additionally designs and delivers company-wide programs to build employees’ networks, strengthen skillsets, and maximize impact.

Prior to joining the DE&I Center team in 2021, Crystal was part of the Learning & Organization Development department. She supported significant leadership development initiatives and experiences at New York Life and managed the company’s Summer Intern Program.

Crystal’s interest in the learning and talent management space sparked during her time working in the nonprofit sector. She was in a role that concentrated on developing and managing learning programs around topics key to effective philanthropy. She additionally participated in a field research study in Buenos Aires, Argentina as part of a World Bank-supported environmental initiative.

Crystal has a passion for career and leadership development. She is committed to building strong relationships and helping others achieve their development objectives throughout all career phases.

Crystal earned her M.A. in International Affairs from The New School and her B.S. in Criminal Justice from Rutgers University. She currently lives in Jersey City, NJ and is a proud puppy parent.

**Eunie S. Popp**
Head of U.S. Sustainable Investing, New York Life Investments (NYLIM)

Eunie Popp is a Managing Director and the Head of U.S. Sustainable Investing at New York Life Investments. She is responsible for driving sustainable investing efforts in the U.S., working across NYLIM and affiliated boutiques to expand ESG offerings and deepen the firm's commitment to sustainable investing.

Prior to this role, Eunie was responsible for Global Product Strategy at NYLIM. As part of that role, she co-led the firm’s ESG initiatives for the U.S. retail business, focusing on ESG product strategy and development.

Before joining NYLIM, Eunie was part of the Office of the Chief Investment Officer at New York Life Insurance Company for 11 years, where she focused on asset allocation and strategy for the General Account. Before joining New York Life Insurance, Eunie held various positions in investment banking at Lehman Brothers and JP Morgan, in New York and in London.

Eunie has a BA in Economics from Columbia University and an MBA from Columbia Business School. She became a CFA Charterholder in 2014.
Calinda Stringer
Corporate Vice President—Operations Customer Service, New York Life Insurance Company

Calinda Stringer is a native of Cleveland Ohio with 26 years of experience in the financial services industry. She is a customer centric leader with a passion for delivering great customer service. Over the course of this time, Calinda has served in various roles all within New York Life (NYL) from entry level to appointive officer. During the past 15 years, in her managerial roles she has hired ~400 employees and managers for Call Center positions in Cleveland, Dallas and Tampa. As part of Calinda’s current role, she oversees the Retention department in Customer Service. Her teams, based in Cleveland, Dallas, Tampa and New York, are responsible for retaining and deepening relationships with the millions of customers by managing customer service grievances, including those directed to the CEO, offering policy illustrations and working with agents to offer solutions and alternatives to policy cancellations. Calinda started her career with New York Life seven days after graduating from high school but was still adamant on becoming a second-generation college graduate even with a full-time job. She holds a bachelor’s degree from Cleveland State University and an MBA from the University of Phoenix. She is a FINRA Registered Principal, having earned both her series 6 and 26 designations. She is co-chair of New York Life’s TWI (The Women’s Initiative) Employee Resource Group (ERG) Cleveland team, and has been active in leading Peer Leadership Circles focused on growth and development of employees.

Most recently, Calinda was one of fifteen employees nominated by New York Life’s Executive Management Committee to form a Social Justice Working Group to advance NYL’s practices in supporting social and racial equity in the communities in which we live and work. Calinda resides in Richmond Heights Ohio with her husband Damon and two children; Devyn (a third-year college student) and Chloe (a private school eighth grader).

Keynote Remarks -
The Role of Finance and Business in promoting diversity and how BMO Capital Markets is playing a major role in supporting and including women in corporate leadership.

Dan Barclay
Chief Executive Officer & Group Head, BMO Capital Markets

Dan Barclay is CEO of BMO Capital Markets, where he is responsible for all of BMO Financial Group's interactions with corporate, government and institutional clients in global markets. Prior to that, he served as co-head of the firm's Global Investment & Corporate Banking, including oversight of equity and debt underwriting, corporate lending and project financing, mergers and acquisitions advisory services and global trade and banking. He has over 29 years of investment banking experience in a broad range of industries.

Mr. Barclay currently serves on the BMO Financial Group's Executive and Operating Committees. He also serves as Chairman of the Board of Directors of the Children's Aid Foundation of Canada and was recognized as a Champion of Change by Women in Capital Markets. Mr. Barclay holds an MBA from the University of Calgary and a Bachelor of Science from the University of Alberta.
Navigating the Future of Work on Wall Street:
Preliminary Findings on the Late Pandemic Return to Work Among Women and Under-Represented Populations in Global Finance featuring Dr. Melissa Fisher and Jeffrey Saunders

Melissa Suzanne Fisher, Ph.D.
Cultural Anthropologist

Dr. Melissa Fisher, a cultural anthropologist, is a Visiting Scholar at New York University’s Institute for Public Knowledge, an Associate Researcher in the Department of Social Anthropology at Stockholm University, a Distinguished Principal Research Fellow at the Conference Board, and an Adjunct Full Professor in the School of International and Public Affairs at Columbia University’s Program in Gender and Public Policy. She also provides thought-leadership and consulting to businesses on DEI and leadership. Previously she was the Laurits Andersen Professor of Business and Organizational Anthropology at the University of Copenhagen.

Melissa is an expert on globalization, organizations, gender, inequality, and work. Her first book, a co-edited volume, Frontiers of Capital: Ethnographic Reflections on the New Economy (Duke University Press, 2006) explored economic and technological innovations at the turn of the millennium. Wall Street Women (Duke University Press 2012) her second, examines the first generation of women in finance, including the important role the FWA played in helping the first cohort to advance in their careers. She is currently working on a book on the future of work in the age of pandemics and new social movements such as Black Lives Matter and Me Too.

Melissa’s research has been profiled by The Wall Street Journal, CNBC, NPR, and other media outlets. She played an advisory role in the first female financial thriller, Equity, a 2016 Sony Classic Picture Release. She serves on a number of advisory bodies, including the Women Creating Change Leadership Council at Columbia University’s Center for the Study of Social Difference, and is a US Delegate to the Women’s 20 which advises the G20 on gender issues.

Jeffrey Saunders
CEO, Nordic Foresight

Jeffery Saunders is an expert in strategic foresight. He is CEO of Nordic Foresight. He formerly served as Director, Copenhagen Institute for Futures Studies Strategy and Innovation and an onsite advisor at the Office of the Secretary of Defense, Stability Operations. Jeff also served as a policy analyst and advisor at the Strategic Assessment Center at SAIC, where he advised the Department of Defense and other government agencies.

Jeff has conducted foresight exercises for Fortune 100 organizations and governments. He has authored over 30 articles, reports, book chapters, etc. on the future of work and organizations, and has also authored 17 ethnographic analyses of subnational and organizational cultures along the Andean Ridge, North Africa, and the Middle East. Jeffery is a sought-after public speaker who has presented at conferences globally.
**Summit Day 1 Closing Remarks**

**Brianna Perez**, FWA Signature Events Chair, and Content & Distribution Strategy Analyst, Wealth Management Global Investment Office, Morgan Stanley

**Annette Stewart**, FWA President 2023-2025, and Director, RBC Capital Markets

Annette received her undergraduate degree from Texas State University and completed her Juris Doctorate at the University of Iowa College of Law where she participated in the University of Iowa's international law program in France and London. She is also a graduate of the University of Michigan Ross School of Business Executive Program for her MBA. Annette has over 17 years of experience working on Wall Street, including companies such as Citadel, Goldman Sachs, Markit, PwC and is currently a Director at Royal Bank of Canada.

Annette has spent her career focused on derivatives regulation, front-to-back trading process, overall firm process improvement, project management, legal trade confirmations & currently working on risk & regulatory initiatives that affect the Cloud environment. Overall, Annette has enjoyed new learning opportunities and has grown her career through her love for learning and collaboration.

Annette volunteers on the Board for the FWA, serves on the University of Iowa College of Law Foundation Board & participates as an advisor for several non-profit organizations.

Annette enjoys free time with her husband, Jeff Fausey, and daughter Paige.
Tuesday, April 12, 2022

Welcome & Opening Remarks

Hermina “Nina” Batson, FWA President 2021-2023

Brianna Perez, FWA Signature Events Chair, and Content & Distribution Strategy Analyst, Wealth Management Global Investment Office, Morgan Stanley

Economic Smackdown – Panel Discussion

Steve Liesman (Moderator)
CNBC Senior Economics Reporter

As CNBC’s senior economics reporter, Steve Liesman reports on all aspects of the economy, including the Federal Reserve and major economic indicators. He appears on “Squawk Box” (M-F, 6AM-9AM ET), as well as other CNBC programs throughout the business day.

Liesman joined CNBC from The Wall Street Journal where he served as a senior economics reporter covering monetary policy, international economics, academic research and productivity. At the Journal, Liesman previously worked as an energy reporter, and Moscow bureau chief. He won an Emmy for his coverage of the financial crisis and was a member of the reporting team recognized with a Pulitzer Prize for stories chronicling the crash of the Russian financial markets.

Prior to joining the Journal in 1994, Liesman was the business editor for The Moscow Times, where, as the founding business editor for the country’s first English-language daily newspaper, he helped create the publication’s stock index, which was the country’s first. Liesman also has worked as a business reporter for both the St. Petersburg Times in St. Petersburg, Fla., and The Sarasota Herald-Tribune in Sarasota, Fla.

Liesman holds an M.S. from Columbia University Graduate School of Journalism and a B.A. in English from the State University of New York, Buffalo.

Follow Steve Liesman on Twitter @steveliesman.

Michelle Meyer
Chief Economist, United States, Mastercard

As chief economist of the United States, Michelle’s responsibilities include development and delivery of differentiated economic, financial, policy and market thought leadership for customers, Mastercard and public policy.

Prior to joining Mastercard, Michelle was previously the Head of U.S. Economics at Bank of America (BoFA) Global Research. At BoFA, she was responsible for providing the firm’s U.S. economic forecasts, including the outlook for GDP, inflation, and Federal Reserve policy. Michelle’s research is focused on the health of the consumer, relying on a variety of high frequency data sources.
Prior to joining BofA Securities in May 2010, Michelle was a senior U.S. economist at Barclays Capital, where she started her career on the U.S. economics team at Lehman Brothers. While at Lehman Brothers, she developed a strong following for her housing outlook, warning about the risks of excess in the housing market.

Michelle earned a bachelor’s degree (magna cum laude) and a master’s degree, both in economics, at Boston University. When at BofA, Michelle and team were ranked among the top three economics teams by the Institutional Investor All America Fixed-Income Research Survey for the last five years, earning the #1 spot in 2021. She was named by Forbes Magazine as one of 30 under 30 in finance in 2011 and a Rising Star by the Women’s Forum for Economy and Society in 2012.

Michelle is a member of the Economics Club of New York. She is a frequent commentator on news media outlets, including CNBC and Bloomberg TV, and is often cited in print and online media.

*Dana M. Peterson*

Peterson joined The Conference Board from Citi, where for many years she served as a North America Economist and later as a Global Economist. Her wealth of experience extends to the public sector, having also worked at the Federal Reserve Board in Washington, DC. Peterson’s research has been featured by U.S. and international news outlets, both in print and broadcast. Publications and networks include CNBC, FOX Business, Bloomberg, Thomson-Reuters, the Financial Times, and The Wall Street Journal. She is on the boards of NABE, NBER, and GIC, Vice-Chair of the New York Association for Business Economics (NYABE), and a member of NBEIC, the Forecasts Club, and the Council on Foreign Relations. She received an undergraduate degree in economics from Wesleyan University and a Master of Science degree in economics from the University of Wisconsin-Madison.

*Lindsey M. Piegza, Ph.D.*
Managing Director, Chief Economist, Stifel, Nicolaus & Company, Incorporated

Dr. Lindsey Piegza is the Chief Economist for Stifel Financial. She specializes in the research and analysis of economic trends and activity, world economies, financial markets, and monetary and fiscal policies. Prior to her role with Stifel, she was the Senior Economist for an investment bank in New York City for eight years consulting clients in the U.S., Europe, Asia and the Middle East.

A highly sought-after speaker across national and international forums, Piegza is often quoted in the business press. She is a regular guest on CNBC, Bloomberg, CNN and Fox Business, as well as national radio and other business news outlets. Piegza is also a monthly op-ed contributor for The Hill.

In addition to her role with Stifel, Piegza is an instructor at the Pacific Coast Banking School, a member of the Chicago Federal Reserve Advisory Committee, SIFMA Economic Advisory Roundtable Chair, co-chair of the NABE International Roundtable, and a well-respected author. Piegza has published numerous academic papers in prestigious journals such as the Harvard Business Review and in textbooks from Northwestern University’s Kellogg Graduate School of Management.
Susan McGeachie is head of the BMO Climate Institute, a virtual hub to convene a strategically planned system of technical expertise, enabling policies, incentives, and investment to advance decarbonization and climate resilience for BMO’s clients and the bank. She brings to this role over 20 years of experience identifying, evaluating and managing climate change-related risks and strategic positioning opportunities. Following her years in ESG research and analytics, she held leadership positions in management and engineering consulting firms. Susan is an adjunct professor at the University of Toronto where she teaches a graduate course in climate finance, and a member of the Canadian Climate Governance Experts panel. Susan was recently named one of twenty-six Canadian Climate Champions by the Canada Climate Law Initiative and the British High Commission ahead of COP26. In 2014 she was named to the Clean50 and Clean 16 lists of practitioners, which recognize contributions to advancing sustainable capitalism.

Ravina Advani joined BNP Paribas in 2001 and is currently the Head of Energy Natural Resources & Renewables Coverage, where she is responsible for all client and sector activity across the Bank's energy practice, including Power & Utilities, Oil & Gas, Metals & Mining Chemicals and Commodities. Her role also entails deepening BNP Paribas' Sustainable Finance initiatives within the energy franchise.

Prior to assuming her current position in late 2018, Ravina was part of the Bank’s Power, Infrastructure & Project Finance North America team, where she was responsible for originating, structuring and executing financings across various asset classes including power (thermal and renewables) oil & gas (LNG, pipelines, petrochemical facilities), transportation (ports, airports) and social accommodation. In 2007, she spent 6 months in Paris supporting the EMEA Project Finance team. Ravina has extensive experience with both domestic and international financings and has played lead roles on several of the bank's prominent arranging/advisory mandates in the bank, private placement, bond and institutional loan markets.

Before joining BNP Paribas, Ravina worked at Orion Power Holdings, a power generation company, assisting with the company's trading and marketing efforts.

Ravina holds a BBA from the College of William and Mary with a concentration in Finance and a minor in French and an MBA from Columbia Business School. In 2019, she received Positive Impact Business certification from the University of Cambridge Institute for Sustainable Finance.
Ana Carolina Oliveira
Managing Director, Head of Sustainable Finance Americas, ING Capital LLC

Ana Carolina Oliveira heads ING’s Sustainable Finance team covering the Americas region. She works with ING’s clients in providing structuring and advisory of sustainable finance solutions, to support them in accelerating their sustainability transitions. Ana Carolina also plays an integral role in supporting ING’s goal of aligning the banks’ lending and investment portfolios with net-zero emissions by 2050. The decision to join the Net-Zero Banking Alliance further builds on ING’s well-publicized Terra approach, a portfolio steering tool which supports the ongoing monitoring of decarbonization trajectory per sector. Ana Carolina also represents ING in supporting industry developments as a member of several working groups from the International Capital Markets Association (ICMA).

Ana Carolina has extensive experience in advising clients on capital structure and working capital optimization and previously has served as a director in ING’s Healthcare sector group where she covered US large multinationals and was one of the founders of ING Diversity & Inclusion group for ING in the Americas. Prior to that she was a senior credit officer on the New York Credit Risk team beginning in 2012, after working four years at ING’s Environmental and Social Risk team in Amsterdam, when she supported ING in steering the Equator Principles review. Before that, Ana Carolina worked in The Netherlands and in Brazil as a risk specialist at ABN AMRO Bank.

She holds an Executive Master in Business Administration (MBA) degree from the Rotterdam School of Management, a post-graduate certificate in Economic Diplomacy and a Bachelor degree in Economics from the Universidade Estadual de Campinas (UNICAMP) in Sao Paulo, Brazil.

Lily S. Trager
Managing Director, Head of Investing with Impact, Morgan Stanley Wealth Management

Since 2006, Lily has dedicated her career to sustainable and impact investing. Lily joined Morgan Stanley in 2014. In her current role, Lily works to provide individual, family and institutional clients with investment products, solutions, research and tools and analytics to capture the opportunities and mitigate risks posed by key sustainability and impact themes.

Previously, Lily worked for Veris Wealth Partners in New York, a Registered Investment Advisory focused exclusively on serving clients with interest in sustainable and impact investing, most recently as Head of Research & Due Diligence. Lily began her career at Cambridge Associates in Boston, where she worked on teams overseeing $3.9 billion in nonprofit, high-net-worth and foundation investment portfolios.

Lily was named to the 2018 class of MAKERS @ Morgan Stanley Wealth Management, a recognition that celebrates women who are ground breakers, advocates, and innovators in their given field.

Lily earned a M.B.A in Sustainable Business from Presidio Graduate School (formerly Bainbridge Graduate Institute) and her B.A. in Anthropology from Bates College. She also co-founded Women Investing for a Sustainable Economy (WISE) in 2012, a professional networking group with eight global chapters. Lily and her family live together in Manhattan.
The Great Resignation Conversation with Executive Search Firms – Panel Discussion

Janice Ellig (Moderator)
CEO, Ellig Group

As the CEO of Ellig Group, Janice is dedicated to increasing the placement of women and diverse candidates on corporate boards and in C-suites by 2025. In 2000 Janice joined the legacy firm Gould McCoy Chadick Ellig as a Partner and assumed sole ownership of Ellig Group in 2017 with a focus on “Reimagining Search.” Prior to her career in search, Janice spent 20 years in corporate America at Pfizer, Citi and Ambac Financial Group, an IPO from Citibank, where she was responsible for Marketing, Human Resources, and Administration. Heralded by Bloomberg Businessweek as one of “The World’s Most Influential Headhunters,” Janice is often consulted for her expertise and commitment to gender parity, inclusion, and diversity. She frequently appears at speaking engagements and as a media guest, has penned multiple articles for publications such as Financial Times, Forbes.com, Directors & Boards, Directorship, Corporate Director, and has coauthored two books: “Driving the Career Highway” and “What Every Successful Woman Knows,” acknowledged by Bloomberg Businessweek as “the best of its genre.” Janice is the Founder of the Women’s Forum of New York’s Corporate Board Initiative and its signature event, Breakfast of Corporate Champions. Since 2011, Janice continues to spearhead this event honoring companies committed to board diversity and encouraging CEOs to sponsor board-ready women for the Women’s Forum database. She chairs the University of Iowa Center for Advancement Board, Director of the National YMCA and board emeritus of the Actors Fund.

Kareem Bakr
Managing Director, Selby Jennings

Kareem Bakr has been with Selby Jennings since 2013 as one of the original members of the brand when it first made its debut in the United States. Originally starting out as a recruiter focused on the Risk Management space, Kareem was able to quickly transition into a key leader within the wider group, focusing on a variety of markets. Today, Kareem leads the Selby Jennings business across the U.S. where he is responsible for the continuous growth of the brand across their nine verticals of expertise.

Having helped scale Selby Jennings to now more than 140 consultants in NYC and 250 across the U.S., Kareem is dedicated to ensuring that Selby Jennings continues to be ranked as a top institution within the world of financial services recruitment. He and his team have impacted the lives of over 1,500 candidates in the past 12 months and work with some of the most prestigious financial institutions in the world, ranging from Tier-1 Investment Banks to Multi-Billion-dollar Hedge Funds.
Josie Sandler
CEO and Founder, Sandler Search

Josie Sandler, CEO and Founder of Sandler Search, has over two decades of executive search experience. Her expertise is in partnering with CEOs, boards of directors and search committees to recruit senior executives for leading nonprofits, social impact organizations, and foundations, locally, nationally, and internationally.

Josie founded Sandler Search in 2010 following successful tenures at two global executive search firms. She has led hundreds of executive searches. Before entering the search profession, Josie served as Associate Vice President, Corporate Affairs at Prudential Securities and as Manager of Corporate Fund Raising for New York Cares. She began her career at R.H. Macy’s in their retail executive management program.

Josie earned an MPA from NYU Wagner School of Public Service and a BA from Dartmouth College. She is a former member of the Dartmouth Alumni Council and active mentor with Bridges to Impact, a Dartmouth alumni organization.

Josie is a long serving board member of Maccabi/USA Sports for Israel and participated in the Maccabiah Games in Israel and Argentina. She has run in the New York City Marathon twice. She is a member of her Co-op Board of Directors.

A native New Yorker, Josie lives in New York City with her husband and daughter.