

# 100WF Monthly Monitor

October 2023



## What's the Monthly Monitor?

100 Women in Finance is excited to deliver this Monthly Monitor to our global community. The Monitor will summarize major organizational updates as well as highlight key events that are relevant to our membership. This edition as well as all historical publications can be found on our website under [News & Updates](#).

## What's New at 100WF?

In October, our dedicated volunteer committees organized an impressive lineup of nearly 40 engaging events that catered to our three key pillars: Education, Peer Engagement, and Impact. These events, both in-person and virtual, have consistently provided value and opportunities for our members and supporters. With a total of almost 250 events held this year, we continue to foster meaningful connections and make a positive impact in the finance sector.

On October 10, the Impact Investing Symposium drew nearly 250 industry professionals for a sold-out event. Over 45 speakers shared their expertise through eight panel discussions, and attendees participated in over 18 small group discussions. We thank the dedicated team of over 40 volunteers, as well as our sponsors and partners, for making this event possible. Read the post-event summary [here](#). Stay tuned for the Post-Event Report and panel replays.

We are thrilled to announce the recipients of our prestigious 2023 APAC and Americas Industry Leadership Awards! Congratulations to Rachel Lord, Senior Managing Director at BlackRock, and Kim Lew, Chief Executive Officer and President of Columbia Investment Management Company. Join us in congratulating these outstanding leaders. Stay tuned for the announcement of the 100WF Industry DEI Award recipients at the upcoming galas. For more details, please refer to our [Hong Kong Gala](#) and [New York Gala](#) web pages.

Our Global Volunteer Conference will take place on November 9. Whether you can spare a few hours or the whole day, this event is designed to bring together the dedicated volunteers of our organization and our staff to engage in meaningful conversation and forge new connections. Our goal is to have representation from each of our 32 locations! Click [here](#) to view the agenda and RSVP.

Global FundWomen Week 2023 is December 4-8. Registration for the virtual conference is open! The in-person conference will be held on December 7, combining peer-to-peer thought leadership, roundtable thematic discussions and speed networking sessions. Manager registration for our in-person conference has now closed but we encourage allocators to register [here](#). View information for the in-person agenda, including speakers and topics [here](#).

- Number of 100WF Registered Members: 30K+
- Number of LinkedIn Followers: 47K+
- Number of Locations: 32
- Number of Staff Members: 26
- Number of Volunteers: 600+

# LOCATION UPDATES



## DECONSTRUCTING TODAY'S POLYCRISIS, PLUS PRACTICAL TIPS TO NAVIGATE THE CHAOS LONDON

On September 19, the London Education Committee organized "Deconstructing Today's Polycrisis, Plus Practical Tips to Navigate the Chaos," hosted by MUFG. The event featured Neil Brown of CQS, Dr Elizabeth of Dr Elizabeth Consultancy, Gareth Shepherd, PhD CFA of Voya Investment Management and was moderated by Lizzy Buss from MUFG Investor Services. The session explored how we can use knowledge of behavioral science to help navigate the polycrisis, leveraging the push and pull of multiple interconnected revolutions in technology, data, artificial intelligence (AI), psychology, mental health, neuroscience and more. Attendees left with a better understanding of how to improve their decision making during unprecedented times.

## REGIONAL JUMPSTART PROGRAM HONG KONG

The September 2023 cohort of the Regional JumpStart Program in Hong Kong saw a remarkable turnout of over 60 college-age students. The event featured four engaging panel discussions led by experts from various sectors, covering topics such as ESG & Impact Investing, AI applications, Private Equity, and more. Additionally, the program included a Speed Mentorship session that fostered close interactions between students and industry practitioners. One standout component was the Dating session with Money, a facilitated forum empowering young women to take action towards their financial goals. We extend special thanks to HSBC for hosting and to the HK Impact Committee for jumpstarting this inspirational event.

To view the entire Flickr album from this event click [here](#).



## MASTER THE ART AND POWER OF NEGOTIATION NEW YORK

On October 4, the New York Education Committee organized an event "Master the Art and Power of Negotiation," hosted by Robert Walters in their Times Square office. Kathryn Valentine, CEO of Worthmore Strategies, led the discussion on the latest research on negotiation and how women can identify their needs, craft their ask, have a successful conversation and achieve better outcomes. Valentine also shared that negotiation goes beyond salary and explored the 75 things to ask for. Women from entry-level to senior positions were in attendance.





# OUR PILLARS

## EDUCATION

### AMERICAS

The Boston committee organized an engaging event "Opportunities in Private Credit," on September 21 hosted by Foley Hoag. The event delved into the significant role that private credit plays in client portfolios, covering topics such as key underwriting trends, return expectations, and challenges. The panel discussion, moderated by Dulari Pancholi, CFA, CAIA from NEPC, featured Emily Bannister, CFA from Wellington Management, and Carolyn Hastings from Bain Capital. Attendees gained valuable insights into the dynamic landscape of private credit and its potential for generating attractive investment opportunities. The event fostered an enriching exchange of ideas and provided a platform for professionals to expand their knowledge and network in this rapidly evolving field.



On October 5, the Philadelphia committee organized a fireside chat with Jami McKeon, Chair of Morgan Lewis. The event was hosted by Morgan Lewis in their Philadelphia office. Opening remarks were made by Katie Flaherty, Managing Director at Morgan Stanley and Avryl Klich, Associate at Morgan Lewis, moderated the discussion. McKeon, who is one of the few women leading a global law firm, offered valuable insights into leadership and career development through mentorship and allyship. Members in attendance had the opportunity to continue the conversation with their peers afterwards over drinks and hors d'oeuvres.



At the "Wealth Wise Investing" event hosted by Butterfield on October 11, attendees learned why women should approach financial planning differently due to longer life expectancies. Dianne Blais, VP of Private Banking and Senior Wealth Advisor at Butterfield, provided insights on mapping out financial futures and addressing financial challenges unique to women during their earning and retirement years. Alison Morrison, Managing Director of Bermuda Compliance Consultants Ltd, delivered opening remarks.



The networking scene was buzzing in late September across the Americas. On September 21, the Northern California committee organized a Bay Area Happy Hour & Networking event, hosted by Makena Capital. The event set the stage for a memorable evening of conversations and connections. Just six days later, on September 27, the Connecticut committee gathered for their Wednesday Networking Happy Hour at Spiga. Then on September 28 in Chicago, Home Partners of America hosted the Fall into Networking Happy Hour. In addition to our education programming, we appreciate the importance of networking in the professional landscape.



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# OUR PILLARS (cont'd)

## EDUCATION

### EMEA

The Zurich committee organized “Applied Innovation Investing: The Secret Sauce to Avoiding Crowded Trade” on August 29 hosted by The Singularity Group. The session featured Evelyne Pflugi, CEO and Co-Founder, The Singularity Group and Anjeza Kadilli, Professor of Finance, Haute Ecole de Gestion-Geneva and covered topics including what innovation reveals about the changing world order, how reindustrialization can be managed sustainably with innovation, and how investors can add value to their portfolios with it. In addition, the Zurich committee continued its longstanding informal networking lunches with sessions in July and September. These small self pay lunches are popular with members and prospective members, helping to build connections and strengthen connectivity between members locally.



On September 12, Paris members came together for “Headwinds for Investors Anticipating ESG Regulations in the EU and UK” with Elisabeth Gamber of AFEP Association Francaise des Entreprises Privees, Viet-Linh Nguyen of AMF, France Vassaux of Simmons & Simmons and moderator Somesha Ferdinand of FLG. The panelists discussed a broad range of topics from recent (and anticipated) changes in ESG regulations to international initiatives that add complexity to the regulatory landscape. The event, hosted by Simmons & Simmons, provided a platform for a deep dive into the challenges financial market players face to meet reporting, marketing, labeling and other disclosure requirements.



This event followed the annual Summer Networking Drinks organized by the Paris committee on 6 July where speakers Philippine Le Vu and Maxence Radjabi, CFA of ODDO BHF Asset Management discussed the opportunities and challenges presented by Artificial Intelligence for businesses, fund managers and investors. The well attended event, hosted by ODDO BHF Asset Management was an opportunity for Paris members to share ideas and reconnect with colleagues.

# OUR PILLARS (cont'd)

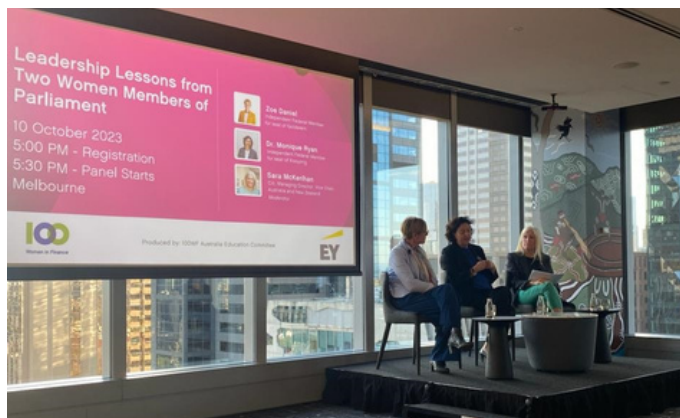
## EDUCATION

### APAC

On October 5, members in Singapore gathered for an engaging session organized by the Singapore Education committee about governance in funds. The event was hosted by GMO and featured Emily Low of Dentons Rodyk, Martin O'Regan of SOLAS Fiduciary Services, Cindy Tan, CFA, CA of GMO Singapore and Damayanti Shahani of Principium Consulting. The panel covered a broad range of topics such as current issues in Board Governance, how board diversity helps governance, and how the financial services industry must collectively work to enhance governance and D&I on fund boards. This event was produced in collaboration with the Singapore Fund Directors Association.



Members in Melbourne had the opportunity to hear lessons learned from two Federal Members of Parliament on October 10 at a special event organized by the Australia committee. Sara McKerihan, Citi moderated the candid conversation with Zoe Daniel MP and Dr Monique Ryan MP. The discussion covered their motivations for pursuing political careers, the unexpected aspects of the jobs and the issues most important to them. To conclude the event, the politicians shared their hopes for the remainder of their career in politics, and their perspectives on the Voice. The event was hosted by EY.



Later in the month on October 16, the 100WF India Working Group produced a webinar “Exploring Careers in Impact Investing” which was broadcasted to a global audience. Alifya Loharchalwala, Head of Impact at Gray Matters Capital and Gayatri Suri, Program Manager, Social Finance at UBS Optimus Foundation shared insights from their experiences, education and volunteerism. They reflected on their careers and gave advice on how to take the leap and manage the transition from the traditional finance sphere to an impact-focused role. The event was moderated by Nishali Chand, Head of Fund Operations and Investor Relations, at Klub.



# OUR PILLARS (cont'd)

## PEER ENGAGEMENT

On September 18, Global Angels traveled to New York City for their annual celebration and engaged in a dynamic discussion led by keynote speaker Anne Clarke Wolff, Founder and CEO of Independence Point Advisory. Anne shared her experiences and lessons learned that propelled her to launch the first female-owned investment bank. Wendy E. Cohen of Katten moderated the session. Following the keynote, attendees enjoyed the opportunity to network with other Angel members at this exclusive event. Become a Global Angel [here](#).

A day later in Hong Kong, mid-career members attended a luncheon on the global real estate market outlook organized by the Hong Kong MidCareer committee. Kim Wright, Managing Director at CPP Investments in conversation with Wendy Yip, Director at S&P Global Market Intelligence, delved into the future of real estate investing, meticulously dissecting market trends and cycles. Kim shared her personal experiences and addressed the challenges women encounter while advancing their careers. WINS S&P Global hosted the event. On October 16, the Hong Kong Early and MidCareer committees teamed up to organize "How Women in Private Equity and Venture Capital Empower Success" hosted by Blackstone. Melissa Guzy of Arbor Ventures, Carol Kim of Blackstone, Jenny Li of Oaktree Capital Management and Diane Raposio of KKR shared insights and lessons learned from their journeys to senior roles in private equity and venture capital. Erin Yam of Blackstone moderated the session.



Global Real Estate Market Outlook Luncheon



How Women in Private Equity and Venture Capital Empower Success



## IMPACT

The final event for the 2023 Global JumpStart event was held on October 6. Registrants hailed from 60+ universities across five continents. During the half-day program, students heard from a range of presenters, including keynote speaker Manuela Veloso, Head of J.P. Morgan AI Research. The program provided insightful knowledge on finance-focused recruiting, equipping students with the necessary tools to navigate this competitive field. They also had the chance to network with fellow students and industry professionals, fostering valuable connections. Key findings from the post-event evaluation will be shared in the Global Impact Report due to be published at the end of this year, stay tuned!

Throughout the fall, our LaunchMe mentees and mentors are joining one-hour virtual discussions on topics that are relevant to career success. Our participants collectively chose the topics for the series during the first part of the program, in part because of the dynamic nature. The sessions, led by professionals from our LaunchMe mentorship program and broader 100 Women in Finance member base, are intended to provide insight and perspective through small, meaningful discussions on the following topics:

- Developing as a Professional
- Innovation driving Digital Asset Management Growth
- The Person on the Other Side of the Interview Table
- Balancing Health, Wellness and Career Success
- Portfolio and Wealth Management: Perspectives on Navigating Career Opportunities

We are halfway through the series and the feedback suggests that mentees are obtaining invaluable knowledge and easy-to-follow guidance as they continue to explore or start their careers. In addition, our mentors have a chance to reflect on their own understanding of industry and professional development issues and how it affects their day-to-day responsibilities and career progression. The topics also provide additional content for 1:1 discussions between mentors and mentees and customized development plans.

# UPCOMING EVENTS



## HONG KONG & NEW YORK GALAS NOVEMBER 1 & 8

Join us at the Hong Kong and New York Galas on November 1 and 8!

The galas are a golden opportunity to expand your professional network, forge meaningful connections, and gain valuable insights from the brightest minds in the industry. Witness the celebration of excellence as we honor the 2023 Industry Leadership Award recipients, whose remarkable achievements have shaped the landscape of the finance sector. Be inspired by the recipient of the 2023 Industry DEI Award, who is setting new standards and paving the way for a more inclusive future.

To learn more click [here](#).

## 100WF VOLUNTEER CONFERENCE NOVEMBER 9

We are thrilled to invite all our volunteers to connect, either in-person or virtually, at our 100WF Volunteer Conference! Our goal is to have representation from all 32 global locations of 100WF. The preliminary agenda features 100WF Global Board Chair Carole Crawford, CFA and 100WF Global Board Vice Chair Barbara Novick. It will be a content-rich one day event for 100WF volunteers providing ample opportunity to network with volunteer peers from all over the globe, as well as the 100WF staff team. There is no fee to attend for current 100WF volunteers. View additional agenda, venue, and suggested accommodation [here](#).

For inquiries click [here](#).



## GLOBAL FUNDWOMEN WEEK DECEMBER 4-8

We are excited to announce that Virtual Registration is open for the 2023 Global FundWomen Week. Taking place from December 4-8, the 2023 GFWW Program will feature an engaging virtual experience, focusing on small group meetings tailored to managers and allocators. These meetings will be scheduled to accommodate participants across different time zones. Instead of virtual 1:1 meetings, we have curated these intimate group sessions to foster interactive opportunities and encourage valuable information exchange. The event welcomes female fund managers and qualified institutional allocators who meet our [eligibility criteria](#).

For more information click [here](#).

