



Women in Finance®

# 100WF Monthly Monitor

April 2024



## What's the Monthly Monitor?

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](#).

### CEO SEARCH UPDATE

In January 2024, 100WF engaged Russell Reynolds Associates, the global executive search and leadership advisory firm, to conduct the organization's search for our next CEO in partnership with our search committee. The CEO position specification is now open for applicants. The global search is ongoing, with the committee set to review candidates in the coming months. The CEO position specifications are accessible on our website or by clicking the link below.

[CLICK HERE](#) 

### NATIONAL VOLUNTEER MONTH

April is recognized as National Volunteer Month, established in the United States in 1974. It is a time to celebrate the incredible impact volunteers make in communities worldwide. 100WF celebrates the 600+ industry practitioners that serve as volunteers around the globe. From New York to Lagos, our volunteers dedicate their time and expertise to achieving our shared goal of strengthening the global finance industry by empowering women to achieve their professional potential at each career stage. Their continued efforts propel us towards Vision 30/40 whereby women occupy 30% of senior investment roles and executive committee positions by 2040.

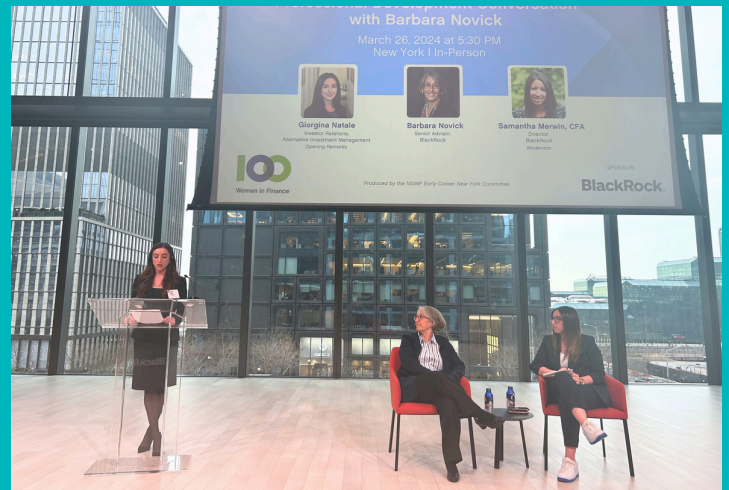
Thank you to each of our volunteers and the firms that support them, for your invaluable contributions; you are the driving force behind our organization's growth and success. Together, we are shaping a more inclusive finance industry for present and future generations.

- Number of 100WF Registered Members: 32K+
- Number of LinkedIn Followers: 53K+
- Number of Locations: 32
- Number of Volunteers: 600+

# LOCATION UPDATES

## PROFESSIONAL DEVELOPMENT CONVERSATION WITH BARBARA NOVICK NEW YORK

On March 26, New York Early Career members had the pleasure of hearing from Barbara Novick, Senior Advisor at BlackRock, as she shared insights and experiences from her career journey, focusing on professional development. In conversation with Samantha Merwin, CFA also of BlackRock, attendees learned about mentorship and how to promote other women at any stage of their careers. Giorgia Natale, Alternative Investment Management, LLC kicked off the session with opening remarks.



## INVESTMENT OUTLOOK AND MANAGER SELECTION FROM A CIO'S PERSPECTIVE WASHINGTON

On April 4, the Washington committee organized an educational session on investment outlook and manager selection from a CIO's perspective hosted by Cambridge Associates. The evening began with a networking hour over drinks and appetizers. Special guest speakers Giovanna Ban, Chief Investment Officer at the Council on Foreign Relations, Celia Dallas, Chief Investment Officer at Cambridge Associates and Catherine Piez, Chief Investment Officer at Brookings Institution, discussed their investment strategies for asset allocation across public markets, private credit and private equity. Guests heard how the CIO's select outside managers and the many factors they consider, including managerial skill or luck. Bridget Sproles, Partner, Endowments & Foundations at Cambridge Associates, moderated the panel and invited guests to join the discussion.

## MEET THE CHALLENGES AND LEARN WHAT IT TAKES TO LEAD CAYMAN ISLANDS

On April 16, the Cayman committee produced a leadership-focused event hosted by Ogier at Agua Restaurant and Lounge in Caymana Bay. Attendees gained insights from successful women leaders, learning essential skills and strategies. Speakers Sarah Busch of Aperture Investors, Julie Castro Abrams of How Women Lead, Anna Spector of CVC Credit Partners and Moderator Joanne Huckle of Ogier shared personal journeys and practical tips, tailoring advice to attendees' career stages. Networking sessions fostered discussions, inspiring attendees to unlock their leadership potential.





# OUR PILLARS

## EDUCATION

### AMERICAS

On March 20, the Boston committee held an educational session hosted by Wellington on how allocators evaluate portfolio managers to find appropriate investment opportunities that will play a key role in generating alpha for their clients' overall portfolios. Speakers Cathy Pena of Fidelity Investments, Katrina Price of Wellington Management and Sarah Samuels of NEPC discussed how the evaluation criteria have changed over time and shared insights into how investors can be most effective in positioning their market strategy. Megan Kelly of Wellington Management seamlessly moderated the conversation. Following the panel, guests enjoyed networking over drinks and appetizers.



On March 21, the Southern California committee convened a panel to explore navigating investment opportunities and challenges in healthcare, hosted by Ropes and Gray. Speakers Vasundhara Bhargava, Principal at Patient Square Capital, Torrey McClary, Partner at Ropes and Gray, Carly Roddy, Managing Director and Head of West Coast Private Capital Markets at J.P. Morgan, Alyse Wagner, Partner at Leonard Green and Partners, along with Bianca Levin-Soler, Moderator and Partner at Ropes and Gray, engaged in discussions regarding the outlook for healthcare investing, the latest trends, and opportunities in private markets. They examined how allocations to healthcare impact individual and institutional portfolios, as well as the current opportunities, challenges, and risks. Following the panel, a reception provided an opportunity for guests to network and further delve into the insights shared.



On March 26, the North Carolina committee held an educational event on the trends in the market landscape of private asset classes, including private equity, real estate and private debt hosted by Hamilton Lane, Morgan Creek Capital Management, Nuveen and S&P Global Market Intelligence. Speakers Jocelyn Lewis, Head of Commercial Strategy for Private Debt Software Solutions at S&P Global, Laura Parrott, Head of Private Fixed Income at Nuveen, Jackie Rantanen, Head of Investor Solutions at Hamilton Lane and Carly Tripp, Global Chief Investment Officer and Head of Nuveen Real Estate Investments also discussed navigating career development as a woman to achieve executive roles in this sector. Hannah Menachem, Vice President, South Regional Head at Hamilton Lane facilitated the engaging discussion. Lunch followed the panel discussion, giving guests the opportunity to share their perspectives with one another.



# OUR PILLARS (cont'd)

## EDUCATION

### EMEA

On March 19, the Zurich committee organized an event titled "The Impact of Real Estate on Sustainability and the Quest for Greenification," hosted by Picket Group. Speaker Ioanna Exarchou, Head of Investor Relations – Direct Real Estate at Pictet Alternative Advisors, and Anjeza Kadilli, Moderator and Professor of Finance at Haute Ecole de Gestion, delved into the significant influence of commercial and residential buildings, which account for 36% of global energy consumption. They provided valuable insights into implementing best practices to enhance the efficiency of real estate construction and building operations, while simultaneously maximizing investment returns. Following the event, guests were encouraged to engage in discussions with colleagues during an aperitif.



On March 19, the London committee hosted a panel discussion; "Investing Through a Sustainable Lens - Themes for 2024", hosted by Sustainable Fitch. Speakers William Bryant, Head of Advisory at NorthPeak Advisory, Elena Dunbar, Senior Counsel at Apollo Global Management, Stephanie Niven, Portfolio Manager at Ninety One, Marina Petroleka, Global Head of Research at Sustainable Fitch and Anna Rudgard, Sustainable Investing at Brown Advisory shared how they consider sustainability in their stewardship and investment decisions, and gave their perspectives on trending 2024 themes. The dynamic discussion was moderated by Jeremy Carter, Global Group Head for Corporate Ratings at Fitch Ratings. Attendees had the chance to network with colleagues over a breakfast buffet both before and after the session.



On April 11, the Milan committee held an educational session; "Learning Collaboratively About Navigating Family Offices" featuring speakers Laura Arnaboldi, Investment Manager at Nuova Energia Holding, Sonia Dehò, Founder of SVD Consulting, and Ana Kuhtic, CIO at Viris SpA, and Moderator Roberta Gamba, Ph.D., Director at BlackRock. The group discussed the intricacies of goal-setting, philanthropy and legacy building while uncovering the nuances of investment strategy development and decision-making that suit each family. The event was hosted by BlackRock's WIN, and guests were encouraged to stay for drinks and appetizers while sharing perspectives.





# OUR PILLARS (cont'd)

## EDUCATION

### APAC

On March 26, the Australia committee orchestrated an event focusing on the prominent theme of artificial intelligence (AI). Hosted by S&P Global Market Intelligence, the event "Should AI be considered a Friend or Fiend" featured speakers Frances Atkins from Givveable, Meredith Jordan from Platinum Pacific Partners, Dr. Mary Manning from Alphinity, and Melanie McQuire from Maple Brown Abbott. Moderator Anna Weickart, a member of the 100WF Australia committee, engaged the panel in discussions about the practical applications of AI within their respective fields, delving into both the advantages and challenges associated with its utilization. After the enlightening discourse, participants had the opportunity to connect and exchange ideas over light refreshments.



On April 18, this Singapore committee hosted an educational event, "Unleashing the Creative Leader Within", hosted by BofA Securities. Speakers Carmen Schwender, Director, APAC Equity Research Management, BofA Securities, who implemented the strategies of Creative Leadership, Mike See, Leadership & Change Consultant, IDEO, and Moderator Maykala Hariharan, SVP, Investment Office, Singlife, discussed the creative and human side of leadership, whether currently in a leadership role or aspiring to reach that goal. Topics included the different types of leaders, the meaning of creative leadership, and how professional educational opportunities can help unlock one's full potential. Guests were invited to discuss their learnings and dig deeper into the topics while networking over drinks and snacks following the program.

On April 25, the Hong Kong committee gathered to hear insights from Tom Hardin, "Tipper X", on behavioral ethics, compliance and organizational conduct and culture risk. Hardin, once a major FBI operative who was key in the investigation Operation Perfect Hedge, the largest insider trading investigation in 25 years and resulted in more than 80 guilty pleas or convictions, is now a trainer, speaker and board advisor. The event marked Hardin's second time addressing 100WF in Hong Kong, continuing a session from 2019. Hosted by PwC Hong Kong, guests were invited to network and share their thoughts over drinks following the program.



# OUR PILLARS (cont'd)

## PEER ENGAGEMENT

On March 20, MidCareer Cayman members attended an interactive discussion hosted by Moore and facilitated by Danielle Walter, owner and creative director of Out of the Blu Marketing, on facing the future with elderly parents. Guests explored the nature of managing the affairs of elderly parents and reviewed the predictable and unexpected issues during the process. Conversation on the multi-dimensional aspects of monitoring their physical well-being, managing their finances and being available with emotional support was encouraged.

On April 10, senior practitioner members in Toronto convened for “Empower Executive Women to Reach Your Full Potential and Explore Board Directorship”. Speakers Elaine Roper, Partner and Head of the Board and CHRO Practices at Odgers Berndtson and Dr. Deborah Rosati, Founder and CEO at Women Get On Board Inc., explored the roles, requirements and rewards of serving on a board. The discussion, moderated by Martha Tredgetti, Managing Partner at Sera Global Advisory, offered attendees valuable tools and resources to advance their board journeys. This inaugural event was hosted by National Bank Independent Network and marked the beginning of Next UP, a series tailored for executive women seeking empowerment, advancement, and enhanced networking opportunities among peers.



## IMPACT

### PRE-CAREER

In early April, 100WF worked with NYU and Baruch to produce industry-focused panel discussions for their student audiences. NYU's “Impact of Women United” event included Sonali Patel Wilson (Wellington Management) and Stephanie Barrows (S&P Global). The Baruch session featured Diana Ge (Deloitte), Judith Cheng (The Pacific Financial Group), and Lauren Malafronte (Avenue Capital). We are grateful to all speakers for their willingness to support and inspire the next generation.



Earlier this month, 100WF's six-month LaunchMe program kicked off with virtual sessions held across multiple time zones, as well as an in-person session in Hong Kong. Program lead Debbie Bigman, professional committee member Alli Spargo, and Hong Kong Impact Director Lena Wong spoke with participants about program expectations and emphasized the various benefits of mentoring relationships. The program leads gave a special thank you to the student and professional committee members for their work and advisory support of the new cohort.

Missed out on becoming a LaunchMe mentor? Wall Street Bound is looking for volunteer support.

One of 100WF's nonprofit partners, Wall Street Bound, is currently recruiting volunteers to advise students during their programs. WSB's mission is to bring diversity to Wall Street by providing students of color with the training, mentorship, and exposure needed to access lucrative career opportunities in the financial services industry.

Learn more about Wall Street Bound here: <https://www.wallstreetbound.org/>  
Submit your interest to volunteer here: <https://www.wallstreetbound.org/mentoring>



# VISIBILITY INITIATIVES


## 100WFINTECH

On April 10, the Germany committee and Global Fintech committee collaborated to produce “Future of Investing: Unveiling Digital Tools and AI Opportunities”, hosted by Scalable Capital. Guests heard from speakers Olga Braun-Cangl, Senior Investment Director, Private Markets, Cambridge Associates, Martina Forsthuber, Country Manager, Austria, Scalable Capital, Alice Huebener, Vice President, Fund Selection and Strategic Clients, BlackRock, and Shivani Aggarwal, Moderator, Quantitative Strategist, Scalable Capital. The discussion covered digital tools for investing and how the individuals who use them are becoming empowered as investors. Additional topics included how asset managers utilize AI in investment processes, AI: an investment frontier and its impact on markets, and Digital investing: how to buy DAX online (fast). Following the program was an apero where guests and participants were encouraged to share their perspectives and network.



## FUNDWOMEN

On April 22, FundWomen held a virtual event spotlighting differences and commonalities between impact, ESG, and responsible investing featuring Maria Simona Jelescu Dreyfus, CEO at Ardinall Investment Management, Bhakti Mirchandani, Managing Director, Responsible Investing at Trinity Church Wall Street and Co-Founder and Steering Committee Member of Institutional Allocators for Diversity, Equity, & Inclusion (IADEI), Michaela Edwards, Partner Capricorn Investment Group and the Sustainable Investors Fund, Geeta Kapadia, CFA, Chief Investment Officer at Fordham University, and Karina Funk, CFA, Portfolio Manager, Large Cap Sustainable Growth, Brown Advisory. Guest managers and allocators learned how to unlock alpha with sustainable investing.




**FundWomen**  
100 Women in Finance


**Spotlight:**

**Differences and commonalities between impact, ESG and responsible investing**


**April 22, 10am ET**  
**Hosted Virtually**




**Michaela Edwards**  
Capricorn Investment Group




**Geeta Kapadia**  
Fordham University



**Bhakti Mirchandani**  
Trinity Church Wall Street



**Maria Jelescu Dreyfus**  
Ardinall Investment Management



**Karina Funk**  
Brown Advisory

Want to take part in ongoing FundWomen events and updates? Register to be a part of our FundWomen Community in CLADE. Please keep your materials updated on our directory and help spread the word. All managers are required to be members of 100WF to participate in ongoing FundWomen events.

To learn more please contact [FundWomen@100Women.org](mailto:FundWomen@100Women.org)

# UPCOMING EVENTS

Register by visiting [100women.org/events/](https://100women.org/events/)

WEBINAR


## Tuning In to What Really Matters: Leadership and Smarter Decisions

**8 May 2024**

8:00 AM London - Dublin  
9:00 AM South Africa - CEST  
11:00 AM UAE  
3:00 PM Hong Kong - Singapore  
5:00 PM Sydney



**Nuala Walsh**  
MindEquity Consulting



**Simone Bouch**  
100WF Australia Committee  
Moderator



Produced by: 100WF Australia Education Committee

## WEBINAR | Tuning in to What Really Matters: Leadership and Smarter Decisions

Members won't want to miss out on this Global Webinar produced by the Australia committee! In a world overflowing with information, it's crucial to focus on what truly counts. Discover how tuning out the noise can enhance your decision-making and leadership skills. Delve into the concept of tuning in with NED and behavioral scientist, Nuala Walsh, renowned author of "TUNE IN: How to Make Smarter Decisions In a Noisy World." Explore the modern challenge of decision-making amidst constant distractions and gain valuable insights into a framework designed to empower leaders to make smarter choices. Simone Bouch of 100WF's Australia committee will moderate.

## Unlocking the Board Room, Milan

This event offers insights into the benefits of serving on a corporate board, including career advancement, skill development, and network expansion. Attendees will learn strategies for entering the boardroom and gain perspectives on the importance of diversity in board composition. The event will also cover effective board membership and leadership. Networking opportunities over drinks and appetizers will follow the program. Financial services professionals are encouraged to attend and consider membership in 100 Women in Finance. The session will be conducted in Italian.



Host

**S&P Global**

## Unlocking the Boardroom

**Milan - 22 May 2024**



**Cristina Finocchi Mahne**  
Board Member  
WCD Foundation



**Angela Gamba**  
Family Office  
Independent Board Member



**Maria Pierdicchi**  
Non Executive Board Member



**Paolo Saccavini**  
Chaberton Partners SA



**Roberto Paciotti**  
S&P Global  
Moderator

Produced by: 100WF Milan Committee

5:30 PM Registration  
6:00 PM Start

## 100WF MEMBER BENEFITS: SPECIAL OFFERS TO INDUSTRY EVENTS

A summary of current offers are listed below and all details are found via the Member Benefits button at the top of your Member Profile. Login now to access the discount codes.

May 23

**Sohn Hong Kong Investment Leaders Conference**  
Hong Kong

June 12

**The Fixed Income Leaders Summit USA**  
Boston

June 3

**SuperReturn Women in Private Markets Forum**  
Berlin

June 19

**Women's Forum Singapore 2024**  
Singapore