

# Financial Services Pipeline Initiative 2014 Summit Agenda



REFLECTING CHICAGO'S **DIVERSITY**

- 8:00 – 8:30**     **Registration and Breakfast**
- 8:30 – 8:45**     **Welcome and Opening Remarks** (*Illinois Rooms 2, 3 and 4*)  
Terry Mazany, President and CEO, The Chicago Community Trust,  
and Co-Chair, FSP Initiative CEO Leadership Council  
  
Rick Waddell, Chairman and CEO, Northern Trust, and Co-Chair, FSP Initiative CEO Leadership Council
- 8:45 – 9:15**     **Introduction of the Financial Services Pipeline Initiative** (*Illinois Rooms 2, 3 and 4*)  
Valerie Van Meter, Senior Vice President and Chief Diversity Officer, Federal Reserve Bank of Chicago,  
and Co-Chair, FSP Initiative Steering Committee
- 9:15 – 9:30**     **Break**
- 9:30 – 11:30**   **Building African-American and Latino Talent Pipelines in the Chicago Financial Services Industry:  
Preliminary Findings and Discussion of Research by Mercer** (*Illinois Rooms 2, 3 and 4*)  
Rick Guzzo, Workforce Sciences Institute Co-founder/ Member and Partner, Mercer  
Alina Polonskaia, Principal, Mercer  
Bess Tschantz-Hahn, Principal, Mercer  
  
*Introduction:* Cedric Thurman, U.S. Head, Diversity and Inclusion, BMO Harris Bank,  
and Member, FSP Initiative Steering Committee
- 11:30 – 1:00**   **Keynote Speaker and Luncheon** (*LaSalle Dining Room*)  
Frank Ross, Director, Center for Accounting Education, Howard University School of Business  
  
*Introduction:* Connie Lindsey, Executive Vice President and Head of Corporate Social Responsibility  
and Global Diversity and Inclusion, Northern Trust, and Member, FSP Initiative Steering Committee
- 1:00 – 2:30**     **Break-Out Sessions:** Facilitated by FSP Initiative Steering Committee members and Mercer
- A. Early Diversity Recruiting: College and Before** (*Directors Dining Room*)  
*Facilitated by:* Peggy Mueller, Senior Program Officer, The Chicago Community Trust, and  
Cassandra Slade, Senior Vice President – Community Development, CRA, Wintrust Financial Corporation
- B. Creative Ways to Fill Key Jobs with Diverse Talent** (*Iowa Room*)  
*Facilitated by:* Deidra Jenkins, Senior Vice President, Chief Diversity and Inclusion Officer – Americas,  
Northern Trust, and Dave Quinn, Executive Director, Global Recruiting, CME Group
- C. Cultural Competency in the Financial Sector** (*Illinois Room 4*)  
*Facilitated by:* Alina Polonskaia, Principal, Mercer, and Roberto Requejo, Senior Program Manager –  
FSP Initiative, Federal Reserve Bank of Chicago
- D. Supporting People of Color in their Early-Mid Careers** (*Illinois Room 5*)  
*Facilitated by:* Jeffrey Allen, Commercial Real Estate Banker, Urban Partnership Bank,  
and Toni Cornelius, Senior Vice President, Human Resources  
  
*Introduction:* Celeste Wright-Harris, Vice President and Head of Human Resources, Loop Capital,  
and Member, FSP Initiative Steering Committee
- 2:30 – 2:45**     **Break**
- 2:45 – 3:15**     **Break-Out Sessions Reports** (*Illinois Rooms 2 and 3*)
- 3:15 – 3:30**     **Closing Remarks** (*Illinois Rooms 2 and 3*)  
Monica Walker, CEO and Chief Investment Officer, Holland Capital Management,  
and Co-Chair, FSP Initiative CEO Leadership Council