

Financial Services Pipeline Initiative 2016 Summit



REFLECTING CHICAGO'S **DIVERSITY**

Third Annual Summit: A Call to Action

Friday, October 28, 2016, 8:00 a.m. – 12:00 p.m.

Federal Reserve Bank of Chicago Conference Center, Illinois Rooms
230 South LaSalle Street, Chicago, Illinois

Agenda

- 7:30 - 8:00** **Conference Registration and Breakfast**
- 8:00 - 8:05** **Call to Order and Introduction to the Summit**
Cedric D. Thurman, U.S. Head, Inclusion, BMO Harris Bank
- 8:05 - 8:15** **Welcome**
Charles Evans, President and CEO, Federal Reserve Bank of Chicago
- 8:15 - 8:45** **Overview and Update on the FSP Initiative**
Valerie Van Meter, Senior Vice President, Federal Reserve Bank of Chicago
- 8:45 - 10:00** **CEO Panel: Leaders' Perspectives on the Initiative**
Terry Mazany, President and CEO, The Chicago Community Trust (*Moderator*)
Matt Feldman, CEO, Federal Home Loan Bank of Chicago
Darrel Hackett, President, BMO Wealth Management, US
David Larson, Executive Vice President – Market Head, Wintrust Financial Corporation
John Rogers Jr., Chairman, CEO and Chief Investment Officer, Ariel Investments
Monica Walker, CEO, Holland Capital Management
- 10:00 - 10:15** **Break**
- 10:15 - 11:15** **Action Projects in Three Domains of the Pipeline**
Domain 1: Preparation and Community Presence (Outreach)
Max Dulberger, Investment Operations Manager, Office of the Illinois State Treasurer
Domain 2: Recruitment and Hiring
Deidra Jenkins, Senior Vice President and Chief Diversity Officer, Northern Trust
Domain 3: Development and Retention
Toni Cornelius, Senior Vice President, Mesirow Financial
- 11:15 - 11:45** **Sharing Best Practices in Two Domains:**
Recruitment and Retention Exemplars from Member Firms
Perika Sampson, Vice President and Regional Diversity Officer, Morgan Stanley
Namrata Yadav, Senior Vice President, Bank of America
- 11:45 - 12:00** **Next Steps and Closing Remarks**
Dave Quinn, Executive Director, CME Group