REFLECTING CHICAGO'S **DIVERSITY**

Financial Services Pipeline Initiative

Summer Intern Career Conference

Thursday, July 13, 2017

Federal Reserve Bank of Chicago

Summer Intern Career Conference

Agenda

	Group A	*Group B*
8:00 – 9:00	**Registration –** *LaSalle Street Entrance Lobby* **Networking Breakfast –** *3rd floor, Conference Center*	
9:00 – 9:30	**Opening Remarks –** *Illinois Rooms 3, 4 and 5* **Nokihomis Willis**, Senior Vice President of People and Culture, Federal Reserve Bank of Chicago **Melissa Donaldson**, Chief Diversity Officer, Wintrust *(Master of Ceremonies)*	
9:30 – 10:30	**Panel Discussion:** Converting an Internship into a Career **–** *Illinois Rooms 1 and 2* **Melissa Donaldson**, Chief Diversity Officer, Wintrust *(moderator)* **Christina Lara-Fernandez**, Info Management Specialist, Federal Reserve Bank of Chicago **Amie Manint**, Accountant, Federal Home Loan Bank of Chicago **Tamara Missick,** Supervision Manager, Federal Reserve Bank of Chicago **Alyse Walker**, HDMA Operational Analyst, BMO Harris Bank **Matthew Walker**, IT Portfolio Manager, CME Group	**Panel Discussion:** Positioned for Impact: Finding Your Purpose **–** *Michael Moskow Auditorium* **Diana Toscas**, Senior Director of Engineer and Execution, CME Group *(moderator)* **Toi Fields,** Managing Director, Information Technology Group, Federal Home Loan Bank of Chicago **Leo Harmon**, Managing Director, Mesirow Financial **Anthony Juozapavich**, Senior Vice President, Morgan Stanley Wealth Management **Yong-Jae Kim**, Managing Director, Mesirow **Carlos R. Whiteman**, Executive Director & Business Development Executive, J.P. Morgan
10:30 – 10:45	**Break** – *Atrium*	
10:45 – 11:45	**Speed Networking –** *Illinois Rooms 3, 4 and 5*	**Speed Networking –** *LaSalle Dining Room*
11:45 – 1:00	**Lunch and Keynote Speech –** *Illinois Rooms 3, 4 and 5* **Ellen Bromagen**, First Vice President and Chief Operating Officer, Federal Reserve Bank of Chicago **Ana Dutra,** President, The Executives' Club of Chicago	
1:00 – 1:15	**Break** – *Atrium*	

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	Group A	*Group B*
1:15 – 2:15	**Panel Discussion:** Positioned for Impact: Finding Your Purpose **–** *Michael Moskow Auditorium* **Diana Toscas**, Senior Director of Engineer and Execution, CME Group *(moderator)* **Toi Fields,** Managing Director, Information Technology Group, Federal Home Loan Bank of Chicago **Leo Harmon**, Managing Director, Mesirow Financial **Anthony Juozapavich**, Senior Vice President, Morgan Stanley Wealth Management **Yong-Jae Kim**, Managing Director, Mesirow **Carlos R. Whiteman**, Executive Director & Business Development Executive, J.P. Morgan	**Panel Discussion:** Converting an Internship into a Career **–** *Illinois Rooms 1 and 2* **Melissa Donaldson**, Chief Diversity Officer, Wintrust *(moderator)* **Christina Lara-Fernandez**, Info Management Specialist, Federal Reserve Bank of Chicago **Amie Manint**, Accountant, Federal Home Loan Bank of Chicago **Tamara Missick,** Supervision Manager, Federal Reserve Bank of Chicago **Alyse Walker**, HDMA Operational Analyst, BMO Harris Bank **Matthew Walker**, IT Portfolio Manager, CME Group
2:15 – 2:30	**Break** – *Atrium*	
2:30 – 3:45	**Peer & Professional Networking (Mocktail)** – *Atrium*	
3:45 – 4:00	**Networking Prizes** – *Illinois Rooms 3, 4 and 5*	
4:00 – 4:30	**Closing Remarks** – *Illinois Rooms 3, 4 and 5* **Perika Sampson**, Regional Diversity Officer, Morgan Stanley Wealth Management	

Profiles

Ellen Bromagen is the First Vice President and Chief Operating Officer at the Federal Reserve Bank of Chicago. Ellen was appointed First Vice President and chief operating officer of the Federal Reserve Bank of Chicago effective September 1, 2015. Prior to her appointment, she was the executive vice president and product manager of the Federal Reserve System's Customer Relations and Support Office (CRSO). The CRSO has a strategic leadership role within the Federal Reserve, managing the nation-wide electronic payments and information delivery network ("FedLine"), leading national sales and marketing strategies associated with $0.5 billion in annual revenue and providing customer set-up and support for over 100,000 users.

Ellen joined the Federal Reserve Bank of Chicago in 1990 and has held a variety of management positions during her time at the bank. Bromagen was promoted to assistant vice president-accounting in 1998. She joined the CRSO in 2003 was promoted to vice president in 2004 with the responsibility for financial planning and revenue management. In 2006, Ellen assumed responsibility for FedLine® Program Management and was promoted to senior vice president in 2008. In 2012 she was promoted to executive vice president and product manager of the CRSO.

Ellen holds a Bachelor of Science degree from the University of Wisconsin and a masters degree from DePaul University.

Melissa B. Donaldson is the Vice President and Chief Diversity Officer at Wintrust Financial Corporation. Melissa is an executive strategist and change agent who is the first to be appointed Vice President and Chief Diversity Officer for Wintrust Financial Corporation, a commercial banking and specialty financial service company with more than $24 billion in assets. In this role, Melissa works with the CEO, senior leadership, and other key stakeholders to establish diversity and inclusion priorities, including initiatives aimed at strengthening the multicultural leadership pipeline, enhancing the customer experience, increasing employee engagement and diverse representation, expanding marketplace reach, and strategic community engagement.

Prior to joining Wintrust, Melissa was Director, Diversity Networks and Communication for Walgreens, one of the nation's largest drugstore chains and part of the Retail Pharmacy USA Division of Walgreens Boots Alliance (WBA), the first global pharmacy-led, health and wellbeing enterprise. In that role, she developed strategies and initiatives that strengthened opportunities to leverage internal and external assets to drive business results and enhance Walgreens standing as an employer of choice and responsible corporate citizen. Melissa is credited with extending women's development initiatives between domestic and international WBA entities, producing two editions of the award-winning Walgreens Diversity & Inclusion Annual Report, launching the Network News quarterly newsletter, establishing a comprehensive strategic planning and leader selection process for business resource groups, creating alliances among external strategic partners to better address organizational needs, and delivering the inaugural WBA Global Executive Women's Conference,

a two-day event which hosted over 250 of the companies top women leaders from around the globe.

Melissa earned a BS in Management Science from Wright State University, an MS in Administration from Central Michigan University, and is a candidate for an MS in Communication from Northwestern University in 2017. She currently serves on the YWCA Lake County Board of Directors, the Executive's Club of Chicago Diversity Leadership Council, Chicago United Leaders Council, the Financial Services Pipeline Initiative Steering Committee, and former member of the Network of Executive Women Inclusion Committee.

She and her husband Kevin are proud Ohioans, and parents to two amazing adult children.

Ana Dutra is the CEO of The Executives' Club of Chicago, a 106 year-old world-class senior executives organization focused on innovation, technology, Diversity & Inclusion and leadership development for current and future top leaders. Prior to that, as the CEO of Korn/ Ferry Consulting and a Proxy Officer for 7 years, Ana created a $350+ MM new global business through a combination of organic growth, 7 global acquisitions, innovative go-to-market approaches and incorporation of technology and digitalization of products and services. In addition to her corporate and civic leadership roles, Ana is a Director in the Boards of the CME Group (CME-NASDAQ), a fin-tech global futures exchange; Greeley and Hansen, a global engineering and manufacturing company and is a senior advisor for technology firms. She is also a Director in The Committee of 200, International Women Forum, Lurie Children's Memorial Hospital of Chicago, Blessings-in-a-Backpack and Academy for Urban School Leadership (AUSL), a top school turnaround organization in the country. Ana is a member of NACD, Women Corporate Directors, Latino Corporate Directors Association, The Commercial Club and the Chicago Council on Global Affairs.

A Brazilian native with over 28 years of experience in P&L management, technology, business growth and C-Level business consulting in over 30 countries, Dutra's expertise lies in helping Boards, CEOs and their teams to identify and execute growth strategies and turnarounds through innovation, acquisitions and new technologies. As a CEO, Ana Dutra has led a number of global acquisitions, post-merger integrations and execution of accelerated growth strategies. She has led and advised businesses in the technology, CPG, food & beverage, retail, pharma, oil & gas, manufacturing, energy and professional services industries. Ana started her career with IBM where she managed clients and lines-of-businesses in a number of countries. After receiving her MBA from Kellogg business school, she led lines-of-businesses and global P&Ls with CSC, Oliver Wyman, Accenture and, more recently, with Korn/ Ferry International.

Ana holds an MBA from Kellogg, a Masters in Economics from Pontificia Universidade do Rio de Janeiro, a Juris Doctor from Universidade do Rio de Janeiro, all summa cum laude. She is fluent in Portuguese, English, Spanish and French and is a frequent speaker in the Global Competitiveness Forum, World Economic Forum and other Global Conferences. She is frequently featured in the Harvard Business Review online, Forbes, WSJ, CEO Magazine and is the guest editor of the 2015 Best of the Boardroom issue of Hispanic Executive magazine. Ana was also awarded the Chicago United Business

Leader of Color, Nueva Estrella Latina and 2016 Women in History and Business Award. Ana is the bestselling author of *Lessons in LeadershiT: Detoxing the Workplace*, published in September of 2016

Ana is an avid triathlete, meditator and yoga practitioner. She lives in Northfield, IL with her husband and their three daughters.

Christina Lara-Fernandez is an Information Management Specialist in the Supervision and Regulation (S&R) Department at the Federal Reserve Bank of Chicago. The department supervises and regulates state member banks, bank holding companies, savings and loan holding companies, and foreign banking organizations within the Seventh District. As an Information Management Specialist, she supports the department staff with application of management techniques to collect information and data, communicate it within and outside the organization, and process it to enable stakeholders to make better decisions.

Prior to Christina's current role, she managed projects in the Customer Relations Support Office. This unique department within the Federal Reserve, supports the managing of the nation-wide electronic payments and information delivery network ("FedLine®") transacting, millions of payments daily valued in the trillions. The office leads national sales and marketing strategies and provides customer set-up and support for over 100 thousand users.

Christina holds a Master's Degree in Strategic Planning and Project Management from DePaul University and a Bachelor's Degree in Information Technology – Application Development from Columbia College Chicago. Christina mentors and volunteers with many organizations such as: WITS - Working in the Schools (a literacy support program for inner city youth to build communities of lifelong learners), Junior Achievement (mentor young people to succeed in a global economy) and Girls On the Run (a program that inspires girls to recognize their strength and develop essential skills to help them establish a lifetime appreciation for health and fitness through a community service project).

Toi Fields is a Vice President and Managing Director at the Federal Home Loan Bank of Chicago (FHLBC) in the Information Technology Department. Toi has been employed with FHLBC since 2004 and worked on Quality Assurance Testing to support the Bank's key enterprise applications supporting investment banking systems and various projects for FHLBC. Her knowledge of systems, bank processes and managing has led to additional functions. Over the last two years, Toi has taken on additional responsibility reporting to the Chief Information Officer and working with the Senior IT Management team supporting the IT group efforts for risk and compliance with a focus on operational and regulatory risk. Toi has a B.S. in Information Technology from DeVry Institute of Technology and a B.A. in Advertising from the University of Illinois in Urbana. Prior to 2004, her experience included an accumulation of quality assurance and managing administrative roles in web design, public relations and architecture.

In the last year, Toi has aided the Bank in developing its first-ever employee resource group, becoming Chair of the African American Employee Resource Group and has been involved in other FHLBC community-based efforts such as Working in the Schools (WITS) for elementary students and the Christ the King Corporate Work Program with high school students employed at the Bank.

Leo Harmon is a managing director in Mesirow Financial's Equity Management group. In his role, he serves as director of research and co-portfolio manager for small cap value and small-mid cap value strategies.

Leo has more than 23 years of investment management experience as a portfolio manager and research analyst covering a variety of industries with both larger and smaller market capitalizations and has a particular expertise in financial services. Prior to joining Mesirow Financial in 2016, he was a managing director, director of research and portfolio manager for Fiduciary Management Associates, LLC, which was acquired by Mesirow Financial. Previously, Leo was a portfolio manager at Allstate Insurance, Allstate Investments LLC.

Leo is a CFA® charterholder and a member of the CFA Institute, the National Association of Securities Professionals and the Economics Club of Chicago. He is also a member of the CFA Society of Chicago, where he was appointed to the board of directors and served as Chairman. In addition, Leo served as Chairman on the External Investment Committee for the Office of the Illinois State Treasurer.

Leo earned a BS in finance from Bradley University and an MBA with a concentration in finance from the Fuqua School of Business at Duke University.

Anthony (Tony) Juozapavich is a Senior Vice President, Non-Producing Branch Manager who joined Morgan Stanley in 1999 in the Chicago-LaSalle office as a financial advisor. His area of concentration was assisting clients in developing long-term financial plans. In 2007 Tony was named the Producing Chicago Complex Sales Manager a position he held for two years before accepting the role as a Complex Business Development Officer in Central Illinois. In July of 2010, Tony was reassigned to the Chicago Complex as the Business Development Officer a position he held for 5 years. In July of 2015, Tony was promoted to the Non-producing Branch Manager of the Chicago-Madison office responsible for 97 financial advisors.

Tony is a graduate of the University of Illinois at Chicago and completed the certificate program in financial planning from DePaul University. He is an active participant with the Special Olympics, USO and is a Mentor for the Imentor program at North Grand High School.

Yong-Jae Kim is a managing director in Mesirow Financial's Investment Banking group. In his role, Jae is responsible for execution leadership and new business development within the Industrials Group. In addition, he leads the firm's coverage efforts within the Industrial Technology sector.

Prior to joining Mesirow Investment Banking in 2016, Jae was a Director in the Global Industrials Group at Robert W. Baird & Co. with a specific focus on the Industrial Technology sector. Jae brings nearly 15 years of M&A and financial advisory experience across diverse industry sectors.

He has completed over 30 transactions representing over $5.0 billion in value on behalf of private equity firms, owner / entrepreneurs, family-owned businesses and public companies. Jae earned a BA from New York University. He holds FINRA Series 7 and 63 licenses. Jae and his wife live in Chicago with their dog, Sonny.

Amie Manint started at the Federal Home Loan Bank of Chicago in the Fall of 2016 as an Accounting Intern. In the Spring of 2017, upon graduation, she was hired on as a full-time Accountant in the Mortgage Partnership Finance (MPF) Accounting group. As an Accountant, her responsibilities include daily reconciliations, monthly reporting and quarterly reporting for one of the Bank's main products. While at the Federal Home Loan Bank of Chicago, Amie has become involved in community service events throughout Chicago, including Chicago Cares, Aon Step Up for Kids, J.P. Morgan Corporate Challenge, Lurie Children's Meals from the Heart at the Ronald McDonald's House, and Anti-Cruelty Society. In addition to community service, she is also a member of the Women's Employee Resource Group and CommuniTeam which organizes events for the employees. Prior to the Bank, she worked as a Loan Opener and Loan Officer Assistant at Platinum Home Mortgage Corporation. While at Platinum Home Mortgage, Amie grew an interest in the financial service industry and hoped that one day she could work in the industry. She is thankful to have found a career at the Federal Home Loan Bank of Chicago, where she can work in both areas she is passionate about.

Upon graduating high school, Amie started at Harper Community College. Once she received her Associates degree in May of 2014, she transferred to DePaul University and completed her Undergraduate degree in March of this year. At the beginning of this month, Amie graduated and received her Bachelors in Science degree in Accountancy and Business Management. She is currently studying to obtain her CPA license.

Profiles

Tamara Missick is a Supervision Manager in the Supervision and Regulation Division at the Federal Reserve Bank of Chicago. She oversees the Seventh District Training and Development team for examiners going through the Examiner Commissioning Program. Tamara has over five years of banking and regulatory experience and continues to stay active in broadening her knowledge for emerging and consumer compliance risk. Tamara holds a Bachelor of Art in Finance with an emphasis in Commercial Banking from Hampton University in Hampton, VA. She currently sits as an Executive Member for the Young Women's Leadership Charter School's Associate Board in Chicago, IL. Additionally, she supports the Chicago Fed's Corporate Social Responsibility Council by serving as Vice Chair of the Volunteer Council and volunteers with other organizations throughout the community. Tamara loves motivating the youth in her community by sharing her knowledge and how they too can be successful no matter what their circumstances are.

Perika Sampson is the Regional Diversity Officer for Morgan Stanley Wealth Management's Great Lakes Region. Her responsibilities include driving diversity and inclusion strategies across 10 states engaging more than 100 managers and impacting approximately 6500 employees. In addition, she develops talent acquisition strategies, facilitates community engagement, supports business development initiatives and manages national partnerships. Her region includes Illinois, Indiana, Michigan, Minnesota, New York, North Dakota, Ohio, South Dakota, Western Pennsylvania and Wisconsin.

Previously she founded and managed Dearborn Consulting Partners. Prior to her consulting career, she had a 20-year career in financial services. She served as Vice President Marketing and Strategy in the Private Client Services division of Bank One (now JP Morgan). Additional corporate roles included positions as senior marketing manager at Charles Schwab & Co., Inc., and institutional relationship manager at RCM Capital Management in San Francisco, CA. She was also a founding member of the management team of two internet-based financial services companies.

Perika is an alumna of the University of California Los Angeles. She has written and published numerous articles on corporate diversity and inclusion. In addition, she has served on the boards of arts and social service organizations in Chicago, IL, Oakland, CA and San Francisco, CA.

Diana Toscas works as Senior Director/Chief of Staff for the Managing Director of Software Engineering at CME Group. Diana is a seasoned professional with fifteen years of experience in technology management delivering results, motivating effective teams and directing major projects in the financial market industry. Diana is responsible for the IT People & Culture, Diversity & Inclusion, IT Recruitment and Talent within the software engineering department.

Serving in numerous roles within the Technology division at CME Group, Diana started her career at CME in Customer Support for Electronic Trading, a department that supports software engineers writing trading applications. She went on to manage large scale IT projects such as migrating CME's Trading Infrastructure to a brand new, 250,000 square feet, state of the art data center. She also managed several operational support teams and worked closely with IT compliance on regulatory demands. Most recently Diana was put in charge of the technology recruiting strategy which has led to a grassroots Diversity and Inclusion effort in the technology division.

Diana holds a B.A. in Computer Science from Loyola University Chicago.

Alyse Walker joined the Product Operations Development Program at BMO Harris Bank in 2017. The Project Operations Program is a year-long developmental program where Alyse works as a full-time operational analyst with the Home Mortgage Disclosure Act Team.

Alyse was raised in Homewood, Illinois and attended Johnson and Wales University in Providence, Rhode Island majoring in Finance with a concentration in Planning. During her sophomore year she attended the Job Shadow Program at BMO Harris Bank, which is a two day program that led her to two internships the following summers. She interned with Business Banking her first year and with Comprehensive Capital Analysis and Review Regulatory Reporting the second year. While interning, Alyse volunteered on numerous occasions with both teams as well as becoming the social committee chair that established outings for all interns in Chicago.

Profiles

Matthew Walker is an IT Portfolio Manager at CME Group. He was hired after he completed a year long internship with CME that he started in the summer of 2016. He completed the internship as an IT Portfolio Manager for the Infrastructure and Operations department and has now moved over to the Engineering and Execution department. As an IT portfolio manager, Matthew oversees the centralized management of processes, methods and technologies used in his department to manage the portfolio of current and proposed projects. The objectives are to determine the optimal resource mix for delivery and to schedule activities that best achieve CME Group's operational and financial goals, while considering various constraints that can and will disrupt the portfolio. He recently graduated from Northern Illinois University with a B.S. in Operations Management & Information Systems and a minor in Business Analytics. He was very involved in multiple extracurricular activities while in school. Matthew is looking to continue his education and receive his MBA within the next few years. Matthew is a first generation American whose parents immigrated from Jamaica. He is very grateful for the experiences and his culture which helped shape him into the person he is today.

Carlos Whiteman is the Executive Director/Business Development Executive with Chase's Commercial Middle Market Banking. A member of the Leadership Team, Carlos is responsible for marshalling bank resources and assets to meet the capital/financing needs of middle market companies – (i.e., companies with annual sales revenues from $20MM to $500MM) – in the Chicagoland marketplace. JPMorgan Chase & Co. has assets of nearly $2.5 trillion and offers a comprehensive set of financial products and services, including credit, equipment finance, real estate finance, treasury services and provides clients with access to the investment services of JPMorgan.

Carlos has consistently been a top-performing business professional. Fluent in "Executive Focused Selling," Carlos knows how to effectively communicate at the Executive level. He is highly regarded for his ability to synthesize information quickly and for his unparalleled "execution quotient" (EQ). He is a master at identifying, structuring, and packaging value, leveraging all of Chase's resources to meet the needs of his customers.

Carlos is a commercial credit-trained, FINRA-licensed, Certified Treasury Professional (CTP). An Honors graduate of Harvard University, he earned a bachelor's degree in the dual concentration of History & Government. Born in Grenada, West Indies, Carlos migrated to America at the age of 8, and moved to Chicago from Brooklyn, NY in 2003. He currently resides with his wife and 9-year-old son in the North Kenwood/Hyde Park neighborhood of Chicago. Carlos considers himself to be a BBQ/grillmaster … in his own right.

Nokihomis Willis is an executive committee member, senior vice president and director of the Office of Minority and Women Inclusion (OMWI) at the Federal Reserve Bank of Chicago, one of 12 Reserve Banks across the United States that, together with the Board of Governors in Washington, D.C., serve as the central bank for the nation. Nokihomis oversees People & Culture, which consists of Human Resources, Internal Communications (HRIC) and the Office of Diversity and Inclusion (ODI). In her role, Nokihomis provides senior strategic leadership and direction for the Bank's human resources and internal communications functions, including strategy development, achievement of high-priority talent management objectives and integration of diversity and inclusion into all aspects of human capital processes. She supports the Bank in achieving its strategies, including fostering an environment of inclusion and mitigating people related risks. Representing the Seventh District on the Federal Reserve System's subcommittee on human resources (SOHR), a committee comprised of Reserve Bank senior HR officers, designed to address Reserve Bank System related human resource initiatives and issues, Nokihomis is SOHR's talent management leadership team (TMLT) co-chair.

Nokihomis received a bachelor degree in operations management from DePaul University and is a graduate of the University of Chicago Executive MBA Program. She has also earned Senior Professional in Human Resources (SPHR) certification. In January 2016, she began the Masters of Arts in Clinical Mental Health Counseling program at Moody Theological Seminary.

Notes

Thank You for Attending!

Financial Services Pipeline Initiative Members

Ariel Investments, LLC
Bank of America
BMO Harris Bank
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Discover
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Loop Capital
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