

Your **fearless** future starts now.



*NOTE: Agenda times are subject to change. Day 1 kicks off at 9:30 AM ET / 2:30 PM GMT. Day 2 kicks off at 8:15 AM ET / 1:15 PM GMT.

Wednesday, December 8

9:30–10:15 AM ET

Welcome Remarks and Opening Keynote

[Karin Raquin](#), *Vice President of Talent Management & Corporate Responsibility, LVMH, and Co-Chair of EllesVMH North America*

[Paul Klauder](#), *Executive Vice President and Head of SEI's Institutional Group, SEI (moderator)*

Stronger Together

Throughout her career, Karin has raised the bar in talent and career management, constantly seeking new ways to identify and showcase talent, amplify voices and drive diversity and inclusion forward at LVMH. Beyond her role in talent management and corporate responsibility, Karin continuously strives to break through glass ceilings and make an impact. Karin channels her passion into active leadership of in-house coaching and leadership programs, including EllesVMH and Women @ Dior, designed to help advance gender equity across the organization globally. She also recently helped launch an initiative within LVMH to increase intersectional allyship across the organization — and show how it can be even more valuable than mentorship. In this Q&A-style session, Paul and Karin will discuss:

- Why allyship, advocacy and community are key ingredients to moving the needle for long-term social change
- The power of grassroots: How employee resource groups like EllesVMH can elevate voices and make a meaningful impact
- Best practices for identifying and investing in your organization's most valuable asset: people

10:15–10:30 AM ET

Break

10:30–11:30 AM ET

Three Talks. Three Ideas. One Hour.

This session is designed with the famous “TED Talks” format. Hear three 20-minute talks.

Your Power Within

[Santoshi Jugmohun](#), *Managing Director and Head of Operations for SEI's Institutional Group in South Africa, SEI*

We all have power within ourselves, but do we consistently own it? Do we let limiting beliefs get in the way? In this talk, Santoshi will share her experiences in overcoming these barriers to success. She will discuss:

- The importance of having a vision for where you want to be and continuing to challenge yourself in pursuit of your goals
- Believing in your inner value and leveraging your unique skillset
- Her journey to joining a board and being her authentic self to help guide strategic direction and decisions

Breaking Stigma: You're Not Alone

[Andrew Onimus](#), *Director of Corporate Programs and Speaker, Minding Your Mind*

Mental health challenges affect every single aspect of an individual's life, and the workplace is no exception. After these last 18 months, initiating conversations around mental wellness, self-care, and resources for help are key to providing awareness, understanding, and removing stigma. Minding Your Mind speaker Andrew Onimus will share his own struggles and hopeful recovery with depression and anxiety to attach real-life experiences to these relevant topics being discussed:

- Recognizing the signs and symptoms of anxiety, depression, and other mental health issues early on and steps to take action and address them
- The courage, skills, and specific language to help a friend, family member, or coworker in distress
- Managing re-entry anxiety – it's important to know that people will be affected differently when returning to the office or work

Growth Does Not Come From Comfort

[Sheena Whitt](#), *Director of Operations, SEI*

We are all capable of or rather responsible for paving our way to growth, finding happiness, solving problems and reaching personal goals. To do so, we must take ownership of our choices and be true to ourselves. Choosing to act can be uncomfortable, but getting through to the other side can offer great reward in the long run. Practice and confidence are essential. In her talk, Sheena will discuss:

- Seeing obstacles as learning opportunities can create many paths and lead to further development
 - Identifying what can and can't be controlled in order to have the courage to embrace discomfort, take personal responsibility and make the choice to lead your own way
 - Challenging yourself to choose your next move
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11:30–11:45 AM ET

Break

11:45 AM–12:30 PM ET

Keynote Session

[Brad Johnson](#) and [David Smith](#), Co-authors of “*Good Guys: How Men Can Be Better Allies for Women in the Workplace*” and “*Athena Rising: How and Why Men Should Mentor Women*”

Cultivating a Culture of Allyship

Gender-in-the-workplace experts David Smith and Brad Johnson present the best actions and practices bearing on gender allyship. They will quickly make the business case for male engagement in gender equality, while integrating why it is good for men, women and the organization. (Hint: Research shows when men are deliberately engaged in gender-inclusion programs, 96% of women in those organizations perceive real progress in gender equality, compared with 30% of women in organizations without strong male engagement.) They apply the latest research and organizational best practices, providing the “how to” for men, women, and organizational leaders who want to be intentional, inclusive, and excellent allies, leveraging mentorship, sponsorship, and workplace partnership to create a more inclusive culture where everyone thrives at work.

- Allyship is more than having good intentions. There is accountability for taking action and achieving results.
 - Allyship traits and behaviors are part of your personal brand, and successful leaders recognize the benefits these can bring to allies, diverse talent and the organization.
 - Building a culture of allyship also means gaining an understanding of the current allyship gap in how people overestimate what they think they are doing or want to achieve as allies.
 - Everyday advocacy skills and best practices can be reframed as a continuum from mentor to sponsor that help people strategize their career, connect them to key influencers and provide the opportunities needed to advance.
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12:30–1:00 PM ET

Break: Mindfulness and Marketplace

1:00–1:40 PM ET

Breakout Sessions

The Rise of ESG and Gender Lens Investing

[Jana Holt](#), *Global Director of Sustainable Investing Solutions, SEI*

[Marina Leacock](#), *Director and Portfolio Manager/Analyst, Lazard Asset Management*

[J. Womack](#), *Managing Director of Investment Products & Personalization for Independent Advisor Solutions, SEI (moderator)*

Global ESG assets are on track to exceed \$53 trillion by 2025.¹ This continued growth comes as a result of investors' increasing interest in a stronger alignment between their investments and their sustainability objectives, as well as a desire for more visibility into the those investments' actual impact. Gender lens investing is a thematic ESG approach focused on promoting gender equity through investments in issuers that advance women in leadership and perform well across multiple dimensions of gender equity. In this session, we will discuss:

- Driving forces behind recent adoption of sustainable investments and aligning portfolios with core values and UN Sustainable Development Goals (UN SDGs)
- Growing interest in gender lens investing and how gender equity can generate value for investors
- Quality and availability of gender diversity data globally

¹ <https://www.bloomberg.com/professional/blog/esg-assets-may-hit-53-trillion-by-2025-a-third-of-global-aum/>

Carving a Career Path in Technology

[Jacqueline Baker](#), *Vice President of Startup Programming, AARP Innovation Labs*

[Shanoo Maniar](#), *Service Delivery Head for the SEI Wealth PlatformSM, SEI*

[Lisa Skeete Tatum](#), *Founder and CEO of LandIt*

[April Walker](#), *GM, U.S. Microsoft Technology Centers*

[Sanjay Sharma](#), *Chief Technology Officer, SEI (moderator)*

Technology is rapidly transforming our lives, businesses and the world by the day. Advancements in technology have led us to adopt new ways of communicating, collaborating, managing our finances, transporting, creating and more. With the continued rise in digital transformation and use of technology comes the need for even more talent and leadership. In this session, our panelists will share what drove them to pursue careers in technology and what excites them about the industry's future. We will discuss:

- Lessons learned throughout the panelists' career journeys
- Key trends and exciting innovations in technology to pay attention to in 2022 and beyond
- Advice to the next generation on pursuing a leadership role in technology or just entering the industry
- How to increasingly attract talent to career paths in STEM

Building Your Brand While Building a Brand

[Laura Gentile](#), *Executive Vice President, Marketing ESPN & Commercial Marketing, Disney Media Networks*

[Binna Kim](#), *President and Co-Founder, Vested (moderator)*

Throughout her career, Laura has always been building—building content, campaigns and entirely new brands like ESPNW. All the while, she has also placed great emphasis on building her personal brand and helping her peers do the same. In her nearly 20 years at ESPN, Laura has become synonymous with her brand as both a highly skilled marketing professional and an advocate for women in sports and media. Her personal brand wasn't developed by accident, but rather, it took persistence and passion for the things in which she believes. In their conversation, Laura and Binna will discuss:

- The value of staying true to your personal brand while advancing in your career
 - How to take the first step in building a brand from the ground up
 - The importance of advocating for yourself and fellow women in your industry
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2:00 – 2:40 PM ET

Breakout Sessions

Establishing Early Career Credibility

[Allie Carey](#), *Managing Director of Front Office Product, Independent Advisor Solutions by SEI*

To propel your career forward or get exposure to new opportunities, it takes more than hard work in your role. It requires building a strong personal brand, creating a robust network and becoming known as a credible go-to within the organization. Gaining credibility and visibility do not happen overnight, but in this session, Allie will share three key strategies to do so that you can start using early on in your career. At the root of all three: the importance of leading with authenticity and integrity, and how doing so can inspire confidence amongst your team and key leaders. In this session, Allie will cover:

- Communication and how to focus on developing the skill
- Building strong relationships
- Embracing confidence and pushing through insecurity

Pivots and Power Moves

[Lynn Evans](#), *Director, Women's Leadership Initiative at the University of Delaware*

[Simon Otter](#), *Head of Business Operations, COVID-19 Testing for the U.K. Department of Health and Social Care*

[Katie Wagoner](#), *Senior HR Business Partner, SEI*

[Steve Bomberger](#), *Head of SEI Sphere, SEI (moderator)*

Have you ever wanted to change direction but weren't sure where to start? Have you questioned whether taking the risk to make a change is worth it? Join us for a powerful conversation about making career pivots and how we can treat our careers more like a lattice than a ladder. Our panelists will share their stories and what ultimately propelled them to take the fearless leap. In this session, they will discuss:

- Their mindsets leading up to major career moves and the decision-making process that led them to take action
- Reflections on how their own pivot experiences opened doors for further growth opportunities
- Why an appetite for risk, confidence and an open mind are critical ingredients for navigating your career journey

Landing Your First Board Seat

[Gay Collins](#), *Founding Partner of Montfort Communications*

[Sarah Francis-Bland](#), *Strategic Relationships Leader, Americas Financial Services Organization, Ernst & Young LLP (EY)*

[Linda Scavone](#), *Director of Risk for SEI Private Trust Company, SEI (moderator)*

Is joining a board one of your professional goals—either now or in the future? Whether you're looking for that next challenge, an opportunity to build new skills or a new source of personal fulfillment, serving on a board of directors can be a chance to stretch yourself and make a strategic impact. In this session, we'll discuss the journey to joining your first board and share perspectives on:

- Outlining a strategic plan to find opportunities and the right cultural fit for you
 - Crafting your board-specific resume to use in your search
 - Getting the lay of the land: how to learn the ins and outs of an organization, get up to speed and find out where you can start contributing
 - Leaning into your strengths and crafting your unique value proposition
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Thursday, December 9

8:15 – 8:30 AM ET

Morning Meditation

[Shannon Gallagher](#), *Founder of East Coast Sun and Moon & ShannonG.Virtually*

Fearlessly Manifesting through Meditation

The benefits of focusing on your breath for 15 minutes are endless, and with an intention like this session, you'll be manifesting all that you desire. You'll be guided through breathing techniques, visualizations, and thoughtful prompts related to successfully navigating your future and following your dreams. This meditation is for beginners. No experience is necessary to start!

8:30 – 9:15 AM ET

Opening Remarks and Keynote

[Gunjan Kedia](#), *Vice Chair of U.S. Bank Wealth Management and Investment Services*

[Sandy Ewing](#), *Senior Vice President, Private Banking TRUST 3000®, SEI (moderator)*

Paving your way: Lessons learned from peaks, valleys and everywhere in between

From a young age, Gunjan Kedia never shied away from change and opportunities for growth. From starting as one of eight women in her engineering program to relocating from India to pursue an MBA at Carnegie Mellon to building a more than 27-year career in consulting and finance, Gunjan Kedia has consistently pursued new learning experiences, even when she felt different. In fact, she embraced feeling different and learned to turn it into an advantage. Today, Gunjan is recognized as one of the most influential women in finance and a fearless champion of equity, diversity and inclusion in the wealth management industry. She consistently leads with authenticity and uses her voice's power to help break down barriers and pave the way for future generations of leaders.

In this session, Sandy and Gunjan will discuss many of the lessons learned from her personal career path, filled with accomplishments, pivots and learning, and perspectives on:

- Three forms of influence we have as leaders and the power of utilizing them effectively
 - How to build up strength, stamina and readiness to ensure you're ready for that next leadership opportunity
 - Maximizing mentorship opportunities within your network (and mistakes to never make)
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9:15 – 9:30 AM ET

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Thinking Outside the Box to Crack the Case

[Vicki Humphreys](#), *President, HML Group, LLC.*

Whether you’re working to solve a business problem from your desk, or you’re in the field scheming to find the best way to take down a criminal operation, going beyond conventional thinking can help uncover the best solution. Vicki Humphreys, business owner and former FBI agent, has some experience in creative problem solving—and some fascinating stories, too. Prior to starting her own investigation, consulting and advisory group, Vicki spent more than 20 years as a special agent with the Philadelphia office of the FBI, conducting complex, high-profile domestic and international white collar criminal investigations. In her talk, Vicki will share:

- The importance of applying unconventional thinking to solve complex matters
- How to weigh the risk-to-reward ratio before committing to a course of action
- Why perseverance and tenacity are critical ingredients to problem-solving and your long-term career path

The Unspoken Truths about Being a New Mother in the Asset Management Industry

[Nathallia Pryce](#), *Marketing & Distribution, Investment Manager Services, SEI*

In this conversation, Nathallia will share her journey of becoming a new mom while maintaining a thriving career in the asset management industry. She will reflect on recent experiences (both before and during the pandemic), describe some of the challenges she discovered, and provide insights on how the financial services industry can make changes to accommodate working mothers—now and in the future. Nathallia will:

- Shed light on some of the obstacles new working mothers face
- Discuss what we can do as industry to provide more support for working mothers
- Share tips on how to find balance with all your responsibilities as your family expands

Finding a Culture Fit That’s Right for You

[Alison Vincent](#), *Non-executive Director, SEI Investments Europe Ltd. board, SEI*

Culture is not one size fits all, and how you define what the “right fit” is for you may change over time. Regardless of where you are in your career, finding a culture where you can be your authentic self at work can drastically increase your happiness and help you reach your full potential. In this session, Alison will share:

- How to discover what you love and what you don’t like when it comes to cultural fit
 - Three principles that guided her early career decision-making
 - Strategies to assess culture before joining a new team or organization
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10:30 – 10:45 AM ET

Break

10:45 – 11:30 AM ET

Closing Keynote

[Erika H. James, Ph.D.](#), *Dean, The Wharton School*

[Jennifer Ciotti](#), *Program Manager for SEI Ventures, SEI (moderator)*

Crisis leadership: What we can learn now to shape our future

This pandemic has all the hallmarks of a crisis: time constraints, ambiguity, unusual circumstances, limited or conflicting information and a need for immediate and decisive action. It has resulted in loss of business, extreme fluctuation in the stock market and declines in productivity. This pandemic is not the first crisis we have faced, and it will not be the last. So what can we learn from this experience and how might we become better equipped to lead through uncertainty or under extreme pressure? How can we navigate the current environment with courage and even find opportunities for growth during this time?

Dean Erika James is an award-winning expert on crisis leadership, workplace diversity and organizational psychology who is courageously blazing the trail for future leaders. Last year, she became the first woman and first person of color to be appointed dean of the Wharton School in the institution's 139-year history...in the middle of a global pandemic. In this session, Erika will discuss lessons learned throughout her career in higher education, and specifically, her experience putting her crisis leadership expertise into practice in this new role over the last ~18 months. Erika will share:

- Crisis leadership best practices to master for before, during and after a crisis takes place
- What distinguishes true crisis leadership from crisis management
- Advice for effectively building (swift) trust and psychological safety with your teams
- Building resilience, agility and the ability to connect the dots and anticipate change
- Mastering the art of tailoring communication based on the needs and concerns of key stakeholders

11:30 AM – 12:30 PM ET

Networking