

New York Gala 2022



November 9, 2022

For the benefit of the 100WF Foundation



Evening Agenda



Welcome and Opening Remarks

Anjuli Patel, 100 Women in Finance NY Gala Chair & **Graham McDonald**, 100 Women in Finance NY Gala Vice Chair

Appetizers Served

State of the Union

Diana Cantor, Global Board Chair, 100 Women in Finance

100 Women in Finance's 2022 Americas Industry Leadership Award Introduced by Diana Cantor, Global Board Chair, 100 Women in Finance Presented to Collette D. Chilton, Chief Investment Officer, Williams College

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100 Women in Finance's 2022 Industry DEI Award for the Americas

Introduced by **Amanda Pullinger**, Chief Executive Officer, 100 Women in Finance

Presented to Wellington Management

by **Steve Burbage**, Managing Director, J.P. Morgan

Dinner Served

Live Auction and Special Pledge

Amanda Pullinger, Chief Executive Officer, 100 Women in Finance

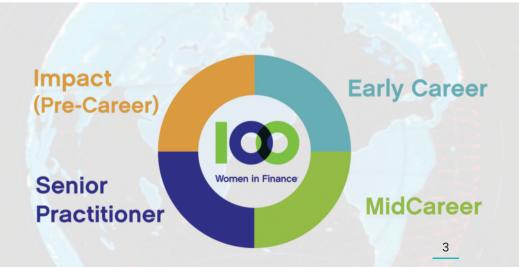
Networking Dessert Buffet and Cocktail Reception

GALA BENEFICIARY100 Women in FinanceFoundation

Gala proceeds benefit 100 Women in Finance Foundation, which supports the organization's programs and initiatives, as well as the efforts of our local program partners, that empower women in the industry at every career stage and inspire the next generation of pre-career women to find pathways into the industry. Our mission is driven by our three Pillars: Education, Peer Engagement and Impact (Pre-Career) initiatives. We operate under a guiding principle that we call Vision 30/40. It is the goal for women to occupy 30% of senior investment roles and executive committee positions by 2040.

Achieving a goal like Vision 30/40 requires that we reach more women who are already in finance and it means that we need to advocate for a new generation of industry leadership.

100WF programs, as well as the programs of organizations that 100WF supports, center around promoting diversity of thought, raising visibility, and empowering women at each career stage to find their personal path to success. This powerful combination fuels our efforts every day and is what gets us closer to achieving our mission.



Industry DEI Award for the Americas 2022

Introduced in 2022, our new **100WF Industry DEI Awards** are intended to shine a spotlight on firms in the traditional and alternative finance industry who have, through internal DEI policies and initiatives, made significant advances in the representation of women at all levels of the firm.

By highlighting those firms who are making strides to increase representation, especially in senior investment roles and in Executive Committee roles, we hope to inspire all firms in the industry to take on the challenge of our Vison 30/40.

Generously sponsored by J.P. Morgan, the Award winners will be voted on by 100WF's Global Board, using the following criteria:

- % of women in senior investment roles (growth and absolute numbers)
- % of women in Executive Committee roles (growth and absolute numbers)
- Strength of and commitment to internal DEI policies
- Strength of and commitment to DEI initiatives (internal and external)

In addition to highlighting those firms who are leading the way for the industry, we also hope to share best practices in DEI policies and initiatives with firms globally, to encourage them to find deliberate and practical ways to create demographic change in their organizations.

The inaugural 100WF Industry DEI Awards have been presented in the following locations:

- EMEA Award: London Gala (April 6, 2022)
- The Americas Award: New York Gala (Nov 9, 2022)

Global Award selection is prioritized based on the region where the majority of the firms' employees are based.

100 Women in Finance

congratulates

Wellington Management

Recipient of the inaugural

100WF Corporate DEI Award for the Americas 2022





Award Finalists

CIBC Scotiabank T. Rowe Price

Highly Commended

AE Industrial Partners

American Century Investments
Capstone Investment Advisors
CLA (CliftonLarsenAllen LLP)
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TOO WOMEN IN FINANCE Americas Industry Leadership Award

Collette D. Chilton

Chief Investment Officer, Williams College





Ms. Chilton has been the Chief Investment Officer at Williams College since 2006, where she is responsible for the investment of approximately \$4.2 billion in assets held by the Williams College endowment. Before joining Williams College, Ms. Chilton held various positions, including President and Chief Investment Officer of Lucent Asset Management, where she was responsible for the oversight and investment of over \$40 billion. She serves on the boards of The Center for Private Equity and Venture Capital at the Tuck School of Business at Dartmouth and the Berkeley Endowment Management Company. She also serves on the investment committee for the Boys and Girls Clubs of Boston, as an Advisor to the Investment Committee of the David and Lucille Packard Foundation, and a member of the Girls Who Invest Advisory Board. In addition, she is an Investor in Residence in the Department of Economics at UCLA. Ms. Chilton graduated from the University of California, Berkeley, with a B.S. in Political Economy of Natural Resources and received an MBA from the Tuck School of Business at Dartmouth.

and Vision 30/40



About 100 Women in Finance



100 Women in Finance strengthens the global finance industry by empowering women to achieve their professional

potential at each career stage. Its members inspire, equip and advocate for a new generation of industry leadership, in which women and men serve as investment professionals and executives, equal in achievement and impact. Through education, peer engagement and impact, the organization furthers the progress of women who have chosen finance as a career, and enables their positive influence over pre-career young women.

Vision 30/40

We operate under a guiding principle that we call Vision 30/40. It is the goal for women to occupy 30% of senior investment roles and executive committee positions by 2040. Even with our efforts, and those of so many other organizations working towards gender equity, we still have quite a way to go for women to hold even close to the number of investment or executive roles in finance that men currently hold.



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ABOUT 100 WOMEN IN FINANCE Global Board Chair



Diana F. Cantor

Diana Cantor's vast and diverse career experiences span the investment, financial and business management, and legal arenas. She is a member of the Investment Committee and the Board of Managers of Alternative Investment Management, LLC, an independent, privately held investment management firm. She is also a Senior Adviser with AKF Consulting

Group, focusing on the areas of governance, fiduciary duties and oversight of state-run investment programs.

Previously, Ms. Cantor served for over a decade as the founding Chief Executive Officer of the Virginia College Savings Plan, the state agency that administers Virginia's Section 529 college savings plans. Prior to her state service, she was a Vice President at Goldman, Sachs & Co., serving as chief administrator of the firm's leveraged buyout and internal investment funds and merchant banking/principal investment operations. In addition, she is a Past Chairman of the Board and served for over ten years as a Trustee of the Virginia Retirement System.

Ms. Cantor is currently a director of three public companies: Domino's Pizza, Inc., VICI Properties, Inc. and Universal Corporation and also serves on the private company boards of Adore Me, Mauser Packaging Solutions and SCP Retirement Services.

Ms. Cantor is a former board member of Revlon, Inc., Media General, Inc., Edelman Financial Group Inc., Edelman Financial Services, Knowledge Universe, Service King Collision Centers and Vistage International.

Ms. Cantor is an Advisory Board member of Stone Canyon Industries, Cerity Partners and Valor Ventures. In addition to her role as the Global Chair of 100 Women In Finance, she serves on boards of the YMCA of Greater Richmond and the U.S. Chamber of Commerce Foundation.

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TOO WOMEN IN FINANCE Corporate Sponsors

100 Women in Finance works with firms globally, creating partnerships and bespoke solutions that represent business areas including: talent management, client entertainment, marketing & branding, diversity & inclusion, training & development, visibility for female talent.

We are grateful for the many longstanding relationships we have with our corporate sponsors around the world who are dedicated to increasing the representation of women in finance overall and the percentage of women in leadership positions.

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For more details on the benefits of becoming a corporate sponsor, please contact the CEO at ceo@100women.org

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■ 100 WOMEN IN FINANCE CEO Circle Donors

The CEO Circle, founded in 100 Women in Finance's 20th anniversary year, aimed to provide resources to ensure that our Vision 30/40 goals are met. Members who donated specifically to the CEO Circle in 2021/22 include individuals and firms who supported 100 Women in Finance's new initiatives and exploration of new strategic locations, aimed at supporting the entry and upward mobility of ALL women into finance careers, with a special focus on under-represented minority women. We thank them for their contribution to our Vision 30/40.

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While the CEO Circle will close at the end of 2022, if you are interested in becoming a donor to 100WF's Vision 30X40, please contact CEO@100women.org.

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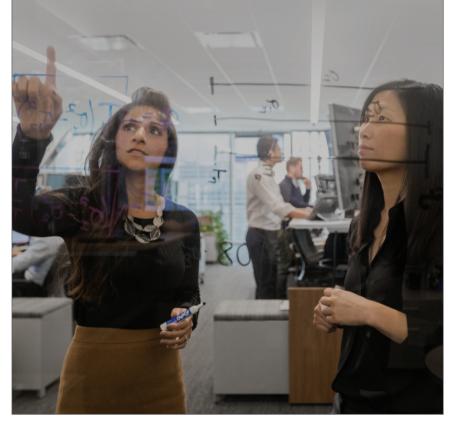


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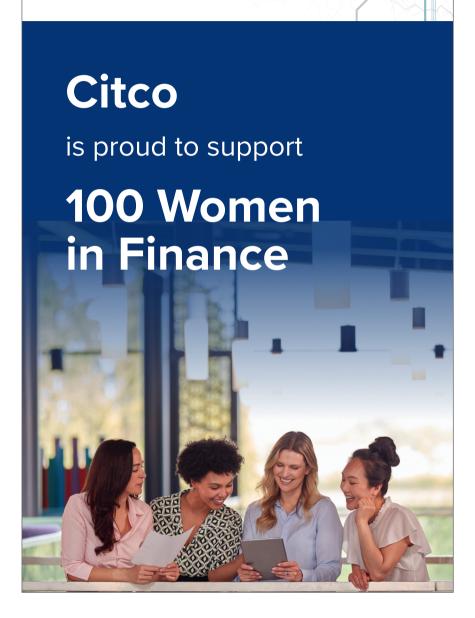
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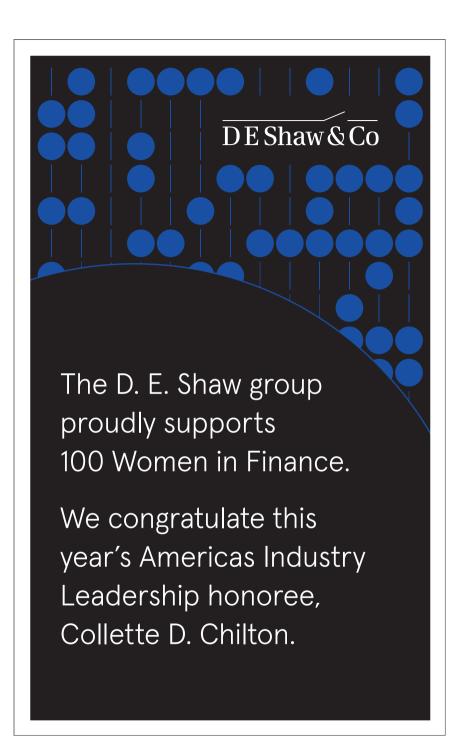


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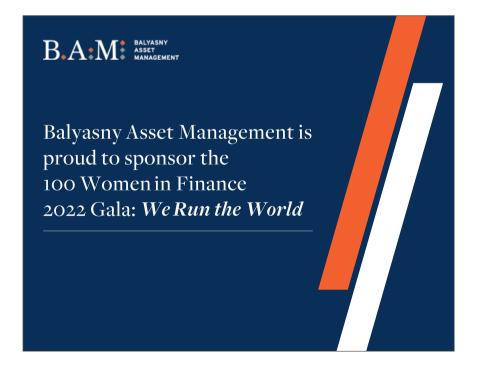
We are committed to making meaningful, measurable progress in diversity, equity, and inclusion, and we are inspired by the mission of 100 Women in Finance to help women achieve their full professional potential.

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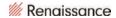
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