



FINANCIAL WOMEN'S ASSOCIATION

2010-2011

Annual Report

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FWA OF NEW YORK, INC.
2010-2011 ANNUAL REPORT

Section I:	Letter from the President	1
Section II:	Committee Reports	3
	Affiliates	
	FWA Long Island Taskforce	3
	FWA of New Jersey	5
	FWA WestCon Taskforce	7
	Audit Committee	8
	Career Connections/Transition Tuesday	9
	College Connections/Wall Street Exchange	10
	Communications & Digital Media	12
	Current Affairs	15
	Directorships and Corporate Governance	17
	Distinguished Speakers	18
	Emerging Issues	19
	Emerging Leaders	20
	Entrepreneurs	22
	Executive Leaders	23
	Financial Backpack	25
	Financial Literacy	27
	Fund Raising	
	Annual Dinner	29
	Holiday Benefit	31
	President's Circle	33
	Global Agenda	35
	International Conference	36
	Investment Policy	39
	Lifestyles	40
	Meet & Mingle	42
	Membership	43
	Men's Alliance	44
	Mentoring	46
	Microfinance	50
	Not-for-Profit	52
	Professional Development	54
	Professional Services Liaison	55
	Scholarships	
	Undergraduate Scholarships	56
	Graduate Scholarships	58
	Special Events Taskforce	60
	Strategic Marketing	61
	TIAW (The International Alliance for Women)	63
	Working Mothers	65
Section III:	Membership	67
	FWA Accepted Members 2010-2011	67
	FWA New Members' Contact Information	70

Letter from the President

June 20, 2011



Dear FWA Members and Supporters,

What an honor it has been to serve as the 2010-2011 Financial Women's Association President! I am proud to be associated with this exceptional organization that has such a rich history of delivering high quality programming for financial services and the community at large and developing leaders at all levels. Together, over the past year, we have raised the profile of the FWA, executed over 150 events, made a difference in the lives of our next generation and broadened our geographic reach.

From the reports submitted by the FWA Leaders, you will be amazed by our accomplishments and will have a better understanding of the efforts involved in what it takes to fulfill our mission of being the leading professional organization that **connects, advances and educates** women in business and finance. Below are key highlights.

Connecting

- Introducing monthly “FWA Celebrates” to recognize special achievements by FWA community members as well as when members help one another
- Creating a warm and inviting community of colleagues, friends and mentors
- Growing our Long Island Taskforce and launching our presence in Westchester / Southern Connecticut

Educating

- Offering top-notch programming on regulation, the European economy, emerging markets, microfinance, non-profit board opportunities and advice for entrepreneurs
- Hearing from such distinguished leaders as Irene Dorner, Sylvia Ann Hewlett, Mohammed El-Erian, Sharon Allen, Joanna Barsh, Noreen Harrington and Karen Hughes
- Holding a successful international conference in Brazil

Advancing

- Exploring corporate board possibilities for women
- Engaging men in supporting women's career advancement by launching the Men's Alliance
- Delivering well-received mentoring and financial literacy programs

We could not achieve all that we have without the tremendous support from our volunteers, President's Circle members and FWA staff. Additionally, our funds raised from our festive Holiday Benefit and inspirational Annual Dinner help to further the FWA's extensive scholarship, mentoring and financial literacy programs as well as the overall educational programming for the general business community.

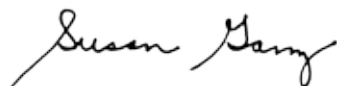
I would like to recognize our 2010-2011 Business League Board in promoting our organization and furthering our mission: **Anne Izzillo**, President-Elect, **Stephanie Hauge**, Past-President, **Nancy Sellar**, Executive Director, **Barbara Cohen**, Secretary and Connecting Pillar Leader, **Karen Rockey**, Treasurer, **Susan Harper**, General Counsel, **Lily Klebanoff Blake**, Vice President of Fundraising and President's Circle, **Julia Hollander Campbell**, Vice President of Education & Business Development, **Mary Ann Grossman**, Vice President of Advancing, **Susan Perry**, Vice President of Next Generation, **Martha Goss**, Audit Chair, **Stephanie Ackler**, Investment Policy Committee Chair, **Jenene Karamon**, Operations Resource Chair, **Judy Mellars**, Membership Co-Chair, **Annette Stewart**, Membership Co-Chair, **Joan Shapiro Green**, Marketing Co-Chair, **Lynette Lager**, Marketing Co-Chair, **Raleigh Mayer**, Communications and Digital Media Co-Chair, **Joyce Sullivan**, Communications and Digital Media Co-Chair, and **Alexandra Tyler**, Communications and Digital Media Co-Chair, **Geraldine Mehu**, Strategic Alliances, **Marlene Debel**, Strategic Advisor, **Patti Domm**, Strategic Advisor, **Pam Packard**, Strategic Advisor, **Andrea Kantor**, Volunteer Engagement, and **Deborah Kaye**, Assistant General Counsel.

Additionally, I would like to thank the broader FWA Leadership Team for your dedication in leading your respective committees and initiatives. You helped to contribute to the vibrancy of the organization with your dynamic programming.

Finally, my thanks to the FWA staff for their hard work and drive in supporting the organization's operations and for their overall advocacy of the FWA: **Nancy Sellar**, Executive Director, **Lisa Buddenhagen**, Director of Operations, Manager, Technology and Online Communications, **Jennifer Durst**, Director of Development, **Anja DeRosa**, Members/Event Coordinator, **Liz Knoop**, Financial Backpack – Program Director, **John Koprowski** and **Carmen Ali***, Accountants.

As you review our activities for the year, I hope that you will be as "wowed" as I have been. I hope that you will be inspired to continue to contribute to our organization's success.

Respectively submitted,



Susan Ganz
FWA President, 2010-2011

**Deceased, June 2011*

AFFILIATES - LONG ISLAND TASKFORCE

Co-Chairs: *Davi Tserpelis, Citibank*
Angelique Siegfried, Deloitte Tax LLP

Committee Purpose and 2010-2011 Objectives

- To provide a forum to network with peers in the financial community on Long Island.
- Increase membership in FWA in the Long Island market
- Partner with Long Island based professional organizations to raise the profile of the FWA on Long Island

Accomplishments/Highlights

The Long Island Taskforce successfully exceeded its goals within annual budget, with more than one profitable event per quarter including a mix of content and networking opportunities. We have explored teaming with other Long Island organizations such as the Long Island Women's Agenda (LIWA) which we joined as a not for profit member in the last quarter to further membership and gain exposure to the FWA in the Long Island marketplace. The taskforce did an excellent job of leveraging relationships and member corporate offices to secure sponsors to host events, as well as personally shopping for disposables and food to avoid high front end committed costs. As a result of our strategic efforts, our net contribution was 199% of our budget for the 9 months ended March 2011.

Stop Tweaking! Make a Quantum Leap Instead! September 22

Our first event of the year was an event focused on sharpening and developing business development skills. Richard Isaac of Sandler Training, Hauppauge, NY, presented an interactive workshop on what it takes to truly bring your business to new heights!

It's Not Always What You Know....But Who You Know – In November, we had an evening of rejuvenation and networking at the Viana Hotel and Spa. Local financial professionals had an opportunity to make new contacts, strengthen existing relationships, and make career connections while enjoying 5 minute back massages, skinny margaritas and excellent food honors of the Viana Hotel.

A New Year and A New Look at Your Financial Health: In January, we identified a distinguished panel of female financial experts, who shared their insights on financial decisions, preparing for potentially devastating financial events and addressing the erosive wealth factor in today's economy. The panelists included Susan Ganz, FWA President, Marilyn Wasserman, Deloitte Tax LLP, Kira Polner Edmonds & Co.

Meet and Mingle – Our first meet and mingle event was in February. We had a great turn out of non-members interested in learning more about the FWA. Several of our taskforce members were there to host and share information and marketing materials with attendee's. All attendee's were added to our marketing database.

Shift into Summer with J Crew - In May we explored changing the time of our events to the morning based on survey feedback from members and attendee's. This inaugural time slot event was focused on networking. A J. Crew representative discussed the current "Business Fashion Trends," and Ann Griffith O'Connor, a J. Crew personal shopper, was available to assist the participants in selecting the hottest trends in summer fashion

Mass Career Customization: Building the Corporate Lattice - In June, we planned an event focused on the changing workforce, gender and generational issues and shifting the corporate ladder to the corporate lattice. A renowned keynote speaker, Anne Weisberg, of Deloitte presented "Mass Career Customization: Building the Corporate Lattice".

Sponsorships & Services: This year we enjoyed sponsorships from the following firms: Sandler Training, Deloitte & Touche LLP, Ace Payroll, and Viana Hotel and Spa.

Hosting:

This year the following companies graciously donated their venue for our events: Westbury Manor, Viana Hotel, Deloitte & Touche, J Crew Manhasset

Recommendations for the Future

- Partner with other organizations on events and activities when possible
- Build out relationships with existing and new companies for potential sponsorship/hosting opportunities

Special Thanks

A special thanks to Participating Taskforce Members who dedicated substantial time contributing to our success

Meghan Winter – Deloitte Tax
Stephanie Levitsky- Deloitte Tax
Kira Polner – Edmunds & Co.
Elena Ratevossian-E&Y

Michelle Sangemino- Deloitte Tax
Kristie Jo Weiss – Grassi & Co
Catherine Verrilli -E&Y
Leslie Berkoff – Morritt Hock

AFFILIATES - FWA IN NEW JERSEY

Co-Chairs: **Cathleen Seneca, E*TRADE**

Emily Kaller, Greenbaum, Rowe, Smith & Davis LLP

Committee Purpose and 2010-2011 Objectives

- Add value to FWA members who live and/or work in New Jersey by organizing networking and professional development events in key areas of New Jersey
- Increase membership in FWA
- Partner with New Jersey-based businesses, professional organizations and educational institutions to co-sponsor programs and as such, raise the profile of the FWA in New Jersey

Accomplishments/Highlights

Membership/Communications:

- FWA NJ maintains its own database of prospective members and communicates event notifications to both the NJ members and prospects lists, in this way increasing the number of attendees at NJ events. Administrative support is provided by Donna Manz.

Events:

- Cathie and Emily provide coaching on event management. Each event has a member of the committee as co-chair. We continue to look for opportunities to work with other organizations on events. The FWA NJ faces geographic challenges due to its size and membership distribution which can create an impediment to attendance at certain events. Due to challenges encountered this year, the FWA NJ did not average one event per month, as contemplated. However, the FWA NJ held several successful events this year.
- In September, the FWA NJ held Noreen Harrington and the Role of the Whistleblower, a well-attended event in which attendees heard Noreen Harrington speak about ethical imperatives and her experiences in reporting the activity that led to the mutual fund timing prosecutions.
- In October, the FWA NJ held Financial Institutions, The Economy and Regulatory Reform: The Good, The Bad and The Ugly, an informative event that addressed the issues currently facing financial institutions.
- Also in October, the FWA NJ partnered with Brooks Brothers to hold a Wardrobe Event at the Short Hills Mall, during which attendees networked, heard from a wardrobe specialist and shopped for business attire, all while raising funds for the FWA Education Fund.
- In April, the FWA NJ partnered with the Not For Profit Committee to conduct a New Jersey-based replica of the successful Not For Profit Board Match Up event previously held in New York.
- In addition, the FWA NJ has continued to hold the FWA NJ Meet & Mingle events on a quarterly basis in Summit, NJ which have been managed by FWA member Mary Tanaskovic Bitting. These events have been well-attended by members and prospective members alike. The FWA NJ Summer Dinner continues to be a favorite event among FWA members and prospective members and is being managed by FWA member Lisa Scalia.

Sponsorship:

- This year we enjoyed sponsorships from Greenbaum, Rowe, Smith & Davis LLP, McCarter & English LLP, Sobel Accounting & Brooks Brothers. E*Trade provided our conference bridge facilities for our monthly conference calls.

Recommendations for the Future

Continue/introduce the following processes:

- Periodically survey membership for what they want to see in events.
- Host events at PC companies with a presence in NJ Host substantive events that educate, inspire and/or promote career development and advancement Partner with other organizations on events and activities when beneficial for the FWA
- Hold quarterly Meet & Mingle events to provide networking opportunities and increase membership
- Hold monthly planning calls and continue use of the planning template

Special Thanks

Noreen Harrington, Michael Horn, Esq., Eric Tunis, Esq., Fran Smyth, our participating FWA NJ committee members and our generous sponsors, Greenbaum, Rowe, Smith & Davis LLP, McCarter & English LLP, Sobel Accounting & Brooks Brothers and E*Trade.

Participating Committee Members

Cathleen Seneca, Emily Kaller, Donna Manz, Stephanie Hauge, Val Simson, Patricia Haverland, Mary Tanascovic Bitting, Anne Hennessy, Trina Mitsch, Lisa Scalia, Lisa Tucci, Susan Reed, Maria Semple, Elizabeth Shapiro, Arti Dua, Alicia Faccone, Susan Hume, Vicky Lai, Donna Lemery, Susan Harper, Eileen Bergman, Angela Segal, Christine Reilly, Paula Durand, Katrin Dambrot, Christine Birnbaum.

AFFILIATES - FWA WESTCONN TASK FORCE

Co-Chairs: Mary Gilmartin, Credit Suisse

Gloria Vogel, CFA, Managing Director of Vogel Capital Management

Committee Purpose and 2010-2011 Objectives

- To provide complimentary venues for professional development and networking with a regional focus.
- To enable attendance by providing events locally in the Westchester / Lower Connecticut region at a time consistent with work/life schedules.
- To increase the FWA membership base.

Accomplishments/Highlights

- Successful meet and mingle with in mid-February with over 25 attendees
- FWA WestConn launch with UBS – “Re-Positioning Your Career” – a panel series with key note Susan Ganz.
- Creation of a task force with three new members in addition to the co-chairs
- Creation on a WestConn Governance structure and strategic charter

Recommendations for the Future

FWA-WESTCONN is to be a supporting presence for Women in Finance that live and / or work in Westchester or Lower Connecticut.

Expectation for 2011 / 2012 FWA Fiscal year is to grow the task force and offer a variety of programs throughout the year.

Special Thanks

Thanks to Susan Ganz for promoting the task force and to Barbara Cohen, Mary Ann Grossman, and Susan Perry for their guidance and support for our first year of FWA WestConn. Thanks to our task force members Evelyn Klein, Mary Gardiner and Jean Cleary who have begun to contribute since the New Year. Also thanks to Joyce Sullivan for helping us jump start our communications.

Additional thanks to Nancy Sellar, Jennifer Durst, Lily Klebanoff Blake and Anja DeRosa for their support and direction.

Participating Committee Members

Susan Ganz – Sponsor
Susan Perry – Sounding board
Mary Gilmartin – Co-Chair
Evelyn Klein – Event Relationships
Jean Cleary – Event Management and Communications

Barbara Cohen – Sounding Board
Mary Ann Grossman – Outreach Advisor
Gloria Vogel – Co-Chair
Mary Gardiner – Event Management

AUDIT

Chair: *Martha Clark Goss, American Water*

Committee Purpose and 2010-2011 Objectives

The mission of the Audit Committee is to assist the Boards of Directors of the Educational Fund and the Business League in fulfilling the Boards' financial oversight responsibilities. Principal responsibilities include selecting the auditors, assuring that the audited financial statements and the tax returns are prepared and filed, and monitoring the financial reporting processes and overseeing the FWA's conflict of interest policies.

Accomplishments/Highlights

- Reviewed the audited financial statements and tax returns (Forms 990) for both the Business League and the Educational Fund for the fiscal year ended June 30, 2010. The financial statements have been posted to the member only FWA Reports section to provide ease of access to the financial information and increase the organizations' transparency to its members. The Forms 990 are available to the public under the About Us section of the website.
- Presented and reviewed the Forms 990 with the respective boards of directors of the Business League and the Educational Fund.
- Reviewed for best in class practices, the governance and the transparency aspects of the FWA's policies and procedures which are highlighted on Form 990.
- Evaluated the proposed transactions involving the FWA or individual members to determine whether the proposed transactions would be in compliance with the FWA's standards of good governance policies.

Recommendations for the Future

Continue to monitor industry developments in governance matters and evaluate the appropriateness of the FWA's governance policies.

Special Thanks

We wish to thank our audit firm, Condon O'Meara McGinty & Donnelly, LLP. We also wish to thank Nancy Sellar, Executive Director; Karen Rockey, Treasurer; John Koprowski, FWA in-house accountant; the Operations Resource Committee; and Susan Harper, General Counsel, for their assistance.

Participating Committee Members

Martha Clark Goss, American Water
June Niklus, Deloitte & Touche, LLP

Mina Baker Knoll, Baker Knoll Consultants

CAREER CONNECTIONS

*Co-Chairs: Margaret Schramm Horn
Patti Mittelman*

Committee Purpose and 2010-2011 Objectives

Career Connections Committee organizes the Transition Tuesday series. The Committee plans and coordinates interactive forums focusing on topics designed to support to FWA members, in transition, contemplating career transitions, or wish to grow their careers with current employers. All speakers are FWA members who share their expertise, talents and skills, as well as individual stories. The Transition Tuesday events are for members-only and offered free of charge to FWA members.

Accomplishments/Highlights

- How to Clinch the Job Interview! – October 12, 2010
- How to Stand Out in a Crowd: Getting Chosen- November 9, 2010
- How Did You Land That Job?- January 25, 2011
- Tweet and Link (In) you Way to Your Next Job- March 8, 2011
- Tweet and Link (In) you Way to Your Next Job- Part II- April 12, 2011
- Secrets From The Coaches- May 10, 2011

Developed an “opt-in” email list of the 70 members that attended sessions throughout the year, for additional networking opportunities, as well as communication of upcoming events.

Recommendations for the Future

Develop content that members are requesting. (In 2010/11 a survey was conducted mid-year of all members that attended our sessions. Subsequent sessions were developed to incorporate relevant suggestions from the survey.

Develop a broader committee base to bring refreshments to each of the events.

Special Thanks

To our speakers:

Stacy Lauren Musi (October 2010)

Raleigh Mayer (November 2010)

Joanna Belbey, Mary Ann Grossman, Vanessa Van Brunt (January 2011)

Joyce Sullivan and Alexandra Tyler (March 2011)

Cornelia Levy-Bencheton, Jean Cleary, Kathryn Lineberger and Joyce Sullivan (April 2011)

Diane DiResta, Laura S. Hill, Sarah Stamboulie (May 2011)

Special thanks to Joanna Belbey and the BGK Group Financial Industry Training for their very generous space donation and for hosting the each of the events.

Participating Committee Members

Jean Cleary and Jill Wiseman

COLLEGE CONNECTIONS

*Co-Chairs: Gerri Facchine
 Sharon Brouillette, JPMorgan Chase*

Committee Purpose and 2010-2011 Objectives

Our goal is to provide participants with the tools necessary to execute a successful job search for a full time career upon graduation from college. This objective is accomplished through a series of workshops that address specific skills including professionalism, leadership, resume writing, interview techniques, networking, career development, and career choice.

The Wall Street Exchange (WSE) Program is a program designed to augment the summer internship work experience of select qualified students who are between their junior and senior years of college and who are employed in the New York metropolitan area. WSE provides an exciting opportunity for participants to enhance job search skills while learning to think strategically about career choices. The program additionally emphasizes the important role a professional network serves in career development. We highlight networking skills and have a committee of dedicated FWA professionals serving as a volunteer 'summer network' who offer WSE participants professional and personal support.

Our committee objectives include an initiative to enhance the scope of our corporate event sponsors' engagement with the WSE program and efforts to strengthen event content exploring how the recent financial crisis and technology such as digital and social media are shaping career paths in finance. We also participate in FWA meetings designed to further explore and develop synergies among the organizations' other next generation programs such as mentoring and financial literacy.

Continuing objectives of the Wall Street Exchange Committee include: fostering corporate sponsorships for events, recruiting top candidates from diverse backgrounds, expanding support and participation by FWA membership and tri-state business schools.

Accomplishments/Highlights

- We continued to create a database to retain student contact information of those who successfully complete the program.
- Continued the leadership groups to offer participants the opportunity to build relationships and understand the value of working in teams.
- Expanded relationships with existing and new companies for sponsorship of the WSE program.
- Created a database of additional schools to promote the program from which to obtain and increase student applications.

Reviewed ideas on how to leverage social and digital media as part of the program (i.e., use of Facebook, LinkedIn, etc.).

Recommendations for the Future

- Create and increase the size of the WSE committee whose members conduct monthly meetings and actively engage in sharing updates, ideas, and feedback about the program to ensure continual improvements are considered and executed as necessary.
- Increase the number of applicants using multiple committee members in revised marketing approach, thereby increasing outreach to schools; Survey students to measure results and modify approach to increase leverage of corporate alliances and internships to attract students.
- Expand networking and informal mentoring opportunities for students by increasing the number of attendees at program sessions by corporate sponsor employees and FWA members.
- Create and expand an “Alumni Network” of current and past WSE program participants to foster networking relationships and future FWA memberships.
- Create professional LinkedIn Group dedicated to WSE participants for leveraging social media and one way to start facilitating “Alumni Network”.
- Maintain and grow corporate sponsor relationships, while ensuring continual partnership approach in planning and execution of all program events.
- Increase opportunities to survey participants to obtain additional ideas and feedback about programming and potential improvements that ensure market driven approach and expand word of mouth referrals to the program.
- Review the program application process and qualification requirements, while exploring ways to utilize technology to further add efficiencies.

Special Thanks

- Susan Ganz, Susan Perry, Lily Klebanoff Blake, and FWA Board members for their support in helping us to shape the 2010-2011 programming and enabling us to leverage FWA talent, while attracting dynamic and diverse participants.
- All of our corporate sponsors and their guest speakers for their generous support, time, and dedication in creating a successful and overall engaging program for participants.
- FWA members Shoya Zichy, Raleigh Mayer, Christine Birnbaum, Laura Smith Dunaief, Joyce Sullivan, Jean Cleary, Cornelia Levy-Bencheton, and Kathryn Lineberger for lending their time and expertise as speakers at WSE program sessions.
- FWA Communications and Digital Media Committee members Joyce Sullivan, Jean Cleary, Cornelia Levy-Bencheton, and Kathryn Lineberger for assisting in leveraging social media channels to market the WSE program.
- Liz Knoop, Financial Backpack Program Director in coordinating and supporting the inclusion of a financial literacy session into the WSE program.
- Nancy Sellar and the FWA office, in particular Anja DeRosa, Lisa Buddenhagen, and Jennifer Durst for all of their hard work in respectively coordinating successful application, website and communication, and corporate sponsorship processes.

Participating Committee Members

Jennifer Bergenfeld
Jane Hand

Mary Tanaskovic Bitting
Joan Mourikis

Kathlene Burke
Julyia Rozenfeld

Jessica Gerth
Laura Smith Dunaief.

COMMUNICATION AND DIGITAL MEDIA

Co-Chairs: **Raleigh Mayer**, Raleigh Mayer Consulting
Joyce Sullivan, Credit Suisse
Alexandra Tyler, Citi

Committee Purpose and 2010-2011 Objectives

Committee Purpose

- Support the goals of the Strategic Marketing Committee by creating platforms for FWA messaging and programs
- Build brand awareness of the FWA’s work, impact and opportunities
- Ensure FWA committee chairs / members are empowered to effectively promote their events

Objectives:

- Leverage marketing channels, e.g. Events, social media, newsletter, email, website
- Increase acquisition of new FWA members and partners / sponsors
- Heighten engagement of existing FWA members, donors and partners / sponsors
- Build awareness of the FWA and our programs (e.g. Ed Fund, mentoring, etc) by achieving press coverage and specific mentions
- Motivate existing members / mentees to become active advocates for the FWA
- Update social media policy jointly with FWA general counsel

Accomplishments/Highlights

- #1 FWA committee 2010-11 bringing in new members: 21 approved; 17 paid
- Updated social media policy; submitted for FWA Board approval June 2011
- Established best practices framework for social media posts to LinkedIn / Facebook / Twitter
- Created partnership framework for non-President’s Circle firms (review continues into 2011-12)
- Completed website wireframes for proposed new home page, member page and partner page
- Streamlined metadata tags for FWA main website increasing Google search site traffic
- Held monthly committee meetings to ensure alignment of overall goals and objectives with subcommittee progress
- Held weekly sub-committee meetings for social media policy, social media sites (Facebook, LinkedIn, Twitter) and partnership research opportunities (media partnership, product partnership, co-branded events)
- Identified FWA Member profiles to feature on website (continues into 2011-12)

FWA Social Media Sites Metrics

FWA LinkedIn:	Metrics (as of May 31, 2011)
– Member Only Group: FWA members actively approve to ‘Opt-In’:	459
– Company Site launched in March 2011	41
– Requests to join since Jan 2011 (members and non-members)	158
– Requests / Percentage approved since Jan 2011	35 / 22%
– Requests / Percentage from Non-Members*	123 / 78%
*All non-members declined receive detailed email how to join FWA	
– Worked with / Trained FWA Committee Chairs to promote events	86%

FWA Facebook:

	Metrics (Sep 2010-Jun 2011)
Open to Members and Non-Member	
Total Post Views	68,686
Total Tab Wall Views	2,794
Total Fans / Likes:	266
Monthly Active Users	166
External Referrers: 914 hits: Google searches majority of hits	
Google: 83%, FWA.org: 9%, LinkedIn 2%, Twitter 1%, All others: 5%	

FWA Twitter: [@FWANY](#)

	Metrics (Sep 2010-Jun 2011)
Followers:	370
Following	229
Tweets:	1,363
Retweets	139
FWA Klout score) Influence Score	37 (out of 100)
FWA President Circle Firms using Twitter:	13
FWA Twitter follows all PC firms on Twitter	

FWA “Live Tweeting” events:

2010:

- Sep 20 Meet & Mingle: NYC
- Oct 7 Strategies for Succeeding in a Changing Environment
- Oct 25 Mohamed El-Erian, CEO of PIMOC with CNBC Michelle Caruso-Cabrera
- Nov 30 Helio Fred Garcia: Keeping Trust in a Crisis: A Competitive Advantage
- Dec 8 FWA Holiday Benefit

2011:

- Jan 20 Leading in Times of Change – Conversation with Ambassador Karen Hughes
- Apr 12 Tweet and Link (In) your way to your Next Job
- May 11 Sangria Tasting and Networking Party
- May 19 Annual Dinner and Women of the Year Awards

Annual Dinner tweets: > [click here](#)

Social media speaking opportunities for FWA CDM members

- Promote FWA to Members and Prospective Members through social media industry events

- Social Media series for FWA Members Only: Tweet & Link (In) your way to your Next Job
Mar 8, 2011: [Tweet and Link \(In\) your way to your Next Job - Part I](#)
April 12, 2011 [Tweet and Link \(In\) your way to your Next Job - Part II](#)
- Business Development Institute:
Nov 18, 2010: [Financial Services Social Communications: FWA Media Partner](#)
Dec 15, 2010: [B2B Social Communications Leadership Forum: Speaker - Alexandra Tyler](#)
- Social Media Week: Feb 7-11, 2011
Feb 8, 2011: [Financial Services Social Media Champions Tell Their Story](#)
Speakers: Joanna Belbey, Joyce Sullivan, Alexandra Tyler
[VIDEO: SWM NYC Social Media in Finance](#)
- May 17, 2011 Net.Finance Digital Marketing and Social Media, Chicago:
[Speaker: Joyce Sullivan](#)

- May 18, 2011 FinExtra Social Media Days: New York
[Speakers: Joyce Sullivan, Alexandra Tyler](#)
[VIDEO: Alexandra Tyler talks social media marketing](#)
- June 7, 2011 Center for Non Profit Success: Facebook 101
[Speaker: Cornelia Levy-Bencheton](#)

Recommendations for the Future

As this is the first year of existence for the Communication and Digital Media’s committee and with the recent announcement this committee will merger with the Marketing Strategy Committee, it is recommended to continue the work in progress into the 2011-2012 FWA year.

The committee members’ engagement has been exceptional and the many accomplishments for 2010-2011 were obtained through the dedication and work of these talented and dedicated committee members.

Special Thanks

Special thanks to the following committee members who led these subcommittee areas:

<u>FWA CDM Committees</u>	<u>Leads</u>	<u>Accomplishment</u>
FWA Profiles	Alexandra Tyler Kathryn Reichert	Featured FWA Leader profile stories
FWA Facebook	Cornelia Levy-Bencheton	Grew Facebook engagement base
FWA LinkedIn	Jean Cleary	Grew membership engagement
FWA Twitter	Kathryn Lineberger	Grew twitter follower base
Social Media Policy	Ilene Moskowitz	Social Media Policy update complete
Metadata tags	Susan Shaw	Updated metadata FWA website search tags
FWA Partnership	Joanna Belbey Sharon Lewis Jeannette Werfel	Researched non-PC partnership opportunities

Special thanks to FWA Office staff, Lisa Buddenhagen and Anja DeRosa for their support.

Participating Committee Members

Joanna Belbey	Tracey Gordon	Mary Alma Noonan
Lisa Buddenhagen	June Klein	Jeannette Paladino
Jean Cleary	Cornelia Levy-Bencheton	Susan Shaw
Anja DeRosa	Karen List	Joyce Sullivan
Linda Descano	Raleigh Mayer	Alexandra Tyler
Gerri Facchine	Ilene Moskowitz	Jeannette Werfel
Sharon Gamsin	Kathryn Nilsson Reichert	Sharon Lewis

CURRENT AFFAIRS

Co-Chairs: *Cathleen Carroll, Morgan Stanley Smith Barney*

Patricia Miney

Committee Purpose and 2010-2011 Objectives

Mission

To promote professional growth for our members through the discussion of topical global industry, government issues as well as next wave issues that are likely to have a significant impact.

Key Objectives

- Bring clarity and build understanding in today's hot topics and highlight tomorrow's financial market challenges
- Serve as a "think tank" gathering ideas from a broad cross-section of industry professionals and sharing them with others
- Move beyond traditional financial topics and explore areas such as: global economics, technology, financial systems landscape.

Accomplishments/Highlights

- **Dodd-Frank Wall Street Reform and Consumer Protection Act.** As the Dodd-Frank Act is translated into regulation, an expert panel from Deloitte discussed significant changes for the future. The panel discussed the affect of the Act on the banking, securities, insurance, and asset management industries in such areas as capital, business information and corporate governance.
- **The Economic Outlook for the European Union (EU).** A panel of experts from BNP Paribas discussed the drivers of the economies and financial markets of the EU. Perspective was given on the sovereign debt crisis, recessionary concerns, market indicators and current expectations for the EU economies.
- **Leading in Times of Change - Conversation with Ambassador Karen Hughes, Global Vice Chair of Burson-Marsteller** Ambassador Karen Hughes has worked in some of the world's highest profile places, from the West Wing of the White House to the halls of foreign state houses and parliaments, to the boardrooms of leading corporations. Ambassador Hughes shared the fundamental leadership principles that can help leaders and those who aspire to be leaders guide their organization through challenging times and how the changes brewing in Washington and on Wall Street will create opportunities for great organizations and great leaders.

Recommendations for the Future

Continue to provide events on hot topics affecting the financial services industry that is of interest to the FWA community.

Special Thanks

Special thanks to our corporate sponsors: Deloitte, BNP Paribas and Busron-Marsteller and the FWA Office for supporting our events.

Participating Committee Members

Elizabeth Armetta
Gerri Facchine
Vicky Lee
Maria Minguez
Barbara Rand
Lydia Sklar
Diane Wallace

Trish Delaney
Julia Knowlton
Jean Magnier
Caroline Nacey
Courtney Brooke Scanlin
Marilyn Thypin
Lulu Wang

Suzanne DiSabato
Kathy Lajoie Malik
Kathleen McDonough
Rose Napoli
Jocelyn Shields
Christina Valauri
Christine Welniak

DIRECTORSHIP AND CORPORATE GOVERNANCE

*Co-Chairs: Nicole Sandford, Deloitte & Touche LLP
Merrie Frankel, Moody's Investors Service*

Outgoing co-chair Ziporah Janowski, Camp Shane LLC

Committee Purpose and 2010-2011 Objectives

The mission of the Directorships & Corporate Governance Committee is three-fold:

- to educate members about cutting-edge corporate governance issues and for-profit/corporate board service;
- to assist women who are board-ready or wish to become board-ready to network, hone pertinent skills and identify opportunities (where possible) for potential board service; and
- to participate in the process of placing our members on public and private company boards.

Accomplishments/Highlights

- Directors' Dinner with attendance of approximately 50 that included the following panelists: Catherine A. Allen, Rita V. Foley, Ellen Odoner, and Natica von Althann (2/11)
- Co-sponsored (with Millstein Center at Yale) Deloitte's Diversifying the American Board Program and preconference workshop (1/11)
- "How Remarkable Women Lead: The Breakthrough Model for Work and Life" event with Joanna Barsh (author) (11/10)
- Completed FWA100 study of women on boards for inclusion in ION's national study (12/10)
- Launched CEO Breakfast series to give committee members access to CEO's. Initial event with TIAA-CREF CEO (3/11).

Recommendations for the Future

Continue outreach to other organizations with similar missions; create opportunities for members to network with active board members; expand knowledge-sharing with the FWA membership.

Special Thanks

Special thanks to event sponsors:

Deloitte	Goldman Sachs	Skadden, Arps, Slate, Meagher & Flom
TIAA-CREF	Weil Gotshal	

Participating Committee Members

Sanem Alkan	Elaine Gilde	Toni Savage	Roseanne Sweeney
Rozlyn Anderson	Stephanie Hauge	Grace Schalkwyk	Ana Valentin
Susan Becker	Joanne Landau	Libby Schuville	Cheryl Vollweiler
Christine Birnbaum	Gail Lieberman	Cathie Seneca	Kathy C. Yohalem
Nancy Boehm	Maureen McCarthy	Laurie Shahon	
Angela Brock-Kyle	Sara Meyer Davis	Dee Dee Sklar	
Andrea Esposito	Susan Migliaccio	Pamela Snyder	

DISTINGUISHED SPEAKERS

Co-Chairs: **Kimberly Weinrick** – JP Morgan Chase & Co
Susan Isquith – Federal Home Loan Bank of New York

Committee Purpose and 2010-2011 Objectives

The mission of the Distinguished Speakers Committee is to develop programs that introduce FWA members to CEOs and senior leaders. The focus of these programs highlight how these executives perceive and resolve key strategic issues, lead and inspire organizations and employees successfully, navigate challenges and promote capabilities of up-and-coming leaders.

Accomplishments/Highlights

- **Managing Your Legacy- An Investment That Appreciates With Time (2/10/11): Sharon Allen**, Chairman of Deloitte LLP, shared her personal journey and perspectives on how to transform your personal brand into a lasting legacy that will be memorable tomorrow. FWA members and guests had the opportunity to take a front row seat and ask Sharon questions during this engaging Distinguished Speakers event. Frequently honored for her contributions to business and community leadership, Sharon has been named to Forbes list of “the 100 most powerful women in the world” for four consecutive years. She received the “Making A Difference for Women” award from the National Council for Research on Women, and Sharon has been named “Woman of the Year” by the FWA.
- **Where are the US and global economy and markets headed? - Member only event featuring PIMCO’s Mohamed El-Erian (10/25/2010)**
Provided budget assistance to Jyoti Bhagavan, chair of the Special Events Task Force.

Recommendations for the Future

- Increase engagement and participation of committee members
- Expand sources of C-level speakers

Special Thanks

- Deloitte LLP & Diane Wallace
- The McGraw-Hill Companies
- FWA Office including Nancy Sellar, Jennifer Durst and Lisa Buddenhagen

Participating Committee Members

Susan Probasco
Gerri Facchine
Nicole Carter

Sunsy Hong
Ella Newman

Vicky Lee
Lyubitsa Gerasimova

Yan Kunetsov
Susy Pestana

EMERGING ISSUES

*Co-Chairs:***Larry Goldfarb, StarCompliance**
Susan Jankowski, UBS

Committee Purpose and 2010-2011 Objectives

The FWA's Emerging Issues committee is re-emerging. It had been combined for a short time with the Current Affairs committee. Part of the FWA Educational Fund's mission to educate the general business community, the Emerging Issues committee expects to stage broad based events in the coming months that will focus on topics that will appeal to a less specialized audience.

Accomplishments/Highlights

To date we have not had any events.

Recommendations for the Future

In 2012, the Emerging Issues Committee expects to engage Cynthia Cooper (WorldCom) to speak at one of our events.

Participating Committee Members

Barbara Scharf
Shari Rodriguez

Tina Vizzini
Margaret Darlow

Christina Valuari
Suzanne Franchetti

EMERGING LEADERS

*Co-Chairs: Loretta Roland, Alliance Bernstein
Katherine Hansell, HSBC*

Committee Purpose and 2010-2011 Objectives

The purpose of this committee is to provide a platform for professional development that focuses on members of the FWA constituency that are within their first 15 years of a career path. Please note, participation is not restricted to a member pursuing their first career but targets all individuals who are beginning new career development.

Our platform rests on three primary objectives. First, members enhance their skill sets in networking with their peers. These “horizontal” relationships are supplemented by the committee’s second objective, the growth of “vertical” relationships which is facilitated through the Emerging Leaders Mentorship Program. This program was established in early 2007 and constitutes the FWA’s only intraorganization

forum that brings emerging leaders into direct contact with more seasoned FWA members who have been in their careers for 25+ years. The final objective of our committee rests in skill enhancement seminars that focus on the development and practice of a professional skill set through lecture, role playing and other interactive procedures.

We believe our committee provides the necessary resources for professional development and support that is essential to the success of any Emerging Leader

Accomplishments/Highlights

- Social Sins and the Workplace Business Etiquette event June 2011
- Cupcakes and Cocktails Networking event Summer 2011 at Professor Thoms’
- Mentorship event Fall 2011

Special Thanks

We would like to thank all Emerging Leaders committee members for their commitment and participation. We also appreciate the efforts of committee volunteers in the planning of our events.

Thanks to our event speakers for their time, experience and solid advice.

Our appreciation goes to FWA leadership, the Advancing Pillar, fellow committees, mentors and the FWA office for kindly providing valuable support, direction and assistance in our endeavors.

Participating Committee Members

Maitri Butcher
Robin Fisher
Naeemah Lajoie
Jean Magnier
Marguerite (Daisy)Platt
Naisargi Shukla
Peggy Yip
Ayturk Markowitz

Arti Dua
Sharon Gala
Christine Li-Auyeung
Sondra Martinez
Jessica Rigby
Galiya Tleuova
Angela Tucciarone
Nicole Carter

Krista Eccleston
Yunna Gleyzer
Laurie Liu
Maribeth Martorana
Sherry Rodriguez
Erika Walker
Caroline Nacey

Marnie Everline
Stacey Haggerty
Carol Livolsi
Birgitta Perezic
Christa Mari Schanz
Michelle Wong
Emmanuella Anyanwu

ENTREPRENEURS

*Co-Chairs: Michele Maybaum CPA, Graf Repetti & Co LLP
Libby Dubick, Dubick & Associates Ltd*

Committee Purpose and 2010-2011 Objectives

The mission of the Entrepreneurs Committee is to:

- Foster and support the growing entrepreneurial segment of the FWA by offering programs that allow members to explore entrepreneurship as a career option.
- Provide opportunities for FWA entrepreneurs/business service providers to develop key entrepreneurship skills and thrive in their businesses.
- Provide a platform for FWA entrepreneurs/business service providers to develop strategic alliances with fellow FWA entrepreneurs and our corporate members.
- Promote the FWA in the business community & foster the development of potential members.

Accomplishments/Highlights

- Does This Make My Assets Look Fat? with author Susan Hirshman (October 21)
- Getting Started with PR with Ethan Rasiel (December 14)
- Social Media Boot Camp with Marcia Golden (March 23)
- The Ability to Improvise while Communicating with Anthony Bova (June 8)
- Strategies, Habits & Tactics of Successful Entrepreneurs with Rob Levin (June 14)

Recommendations for the Future

- Promote networking among all FWA members.
- Provide opportunities for FWA entrepreneurs/business service providers to showcase their products and services.
- Continue to provide education to FWA members & the business community.
- Continue to promote the FWA in the business community

Special Thanks

Graf Repetti & Co LLP for hosting the committee meetings

Participating Committee Members

Michele Maybaum, Co-Chair, Graf Repetti & Co LLP
Janice Carapellucci, Carapellucci Design
Katherine Sayer, New York Life Insurance Company
Lorraine Baker, Prudential Douglas Elliman
Lenore Kantor, FXall
Susan Kintner, Strategic Legal
Julia Hollander Campbell, Corporate Security Resources Inc

Libby Dubick, Co-Chair, Dubick & Associates Ltd
Maribeth Martorana, Factset Research Systems Inc
Jenevra Georgini, American International Group Inc
Fran Riemer, Riemer Consulting
Sanem Alken. Sam Advisory
Jeri Quinn, Driving IR

EXECUTIVE LEADERS

Co-Chairs: Stacy Lauren Musi, Managing Director at Chadick Ellig Executive Search
Diane D’Erasmus, Regional President – Corporate Banking at HSBC

Committee Purpose and 2010-2011 Objectives

In 2007, we established the FWA Executive Leaders Committee to create special events for senior-ranking executive women. Designed to engage high-profile executive women with the FWA, these events provide an opportunity for peer-to-peer networking in exclusive settings.

The FWA Executive Leaders events are invitation-only for a select number of qualified invitees, ranging in number from 15 to 85. Typically priced at \$100-\$150 per person, all or most of the event proceeds go to benefit the FWA to fund financial literacy, mentoring, scholarship and other programs.

We are proud that high-end institutions have graciously hosted FWA Executive Leaders events in order to support the FWA’s educational and philanthropic efforts, and to raise their own brand awareness among this elite target audience.

Over the 2010-2011 season, we are proud to have held the following events:

Accomplishments/Highlights

- **Innovation and Leadership Executive Salon.** We kicked off our 2010-2011 season with a lively and informative panel discussion. Moderated by Stacy Lauren Musi of Chadick Ellig Executive Search, we heard from Maliz E. Beams, Former EVP and President & CEO Individual & Institutional Services at TIAA-CREF; Catherine H. Smith, CEO of U.S. Retirement Services at ING, and Caryl M. Stern, President & CEO of the U.S. Fund for UNICEF. With a networking reception by celebrity caterer, *Paris Commune*, the venue was the 4,000-square-foot Central Park South apartment that was featured in the film “*Did You Hear About the Morgans?*”
- **FENDI.** In partnership with **Marie Claire**, we hosted an exclusive holiday shopping and networking event at FENDI. We previewed the collection and heard about the iconic brand from the General Manager of the flagship Fifth Avenue store.
- **21 Club Lunch.** We celebrated the 80th anniversary of the Iconic 21 Club Restaurants with a lunch in the private dining room in the Wine Cellar, where we met the Chef and Sommelier and heard stories about the restaurant’s colorful history.
- **CORE CLUB.** Hosted at this exclusive private social club in the heart of New York City, we viewed their impressive collection of contemporary art, on loan by their members, and heard about art collecting from experts.

Recommendations for the Future

We will continue with our strategy in the upcoming year, to raise the profile of the FWA among senior-ranking executive women, and to provide an attractive venue and platform for them to meet and network.

We are proud that a number of our attendees have subsequently joined the FWA, or became re-engaged with the organization, and we will continue our membership outreach to this population.

Special Thanks

First, we would like to thank our Committee, and especially Alex Tyler who has gone above and beyond the call of duty in conceptualizing and organizing several of our events.

Second, we would like to thank Ian Simpson Reisner and all of the wonderful people at Sotheby's International, FENDI, Mari-Claire, The 21 Club, and Core Club for being such gracious hosts.

And last but not least, we would like to thank the FWA office for all of their help and support.

Participating Committee Members

Elaine Clark, Director, Head of Corporate Communications, Americas at ING

Sarah Dunn, SVP Human Resources at Coach

Rehana Farrell, Managing Director at Merrill Lynch

Raleigh Mayer, Consultant, Executive Coach and "Gravitas Guru"

Patricia Preston, SVP U.S. Debit Product Management & Development at MasterCard

Alexander Tyler, VP Global Transaction Services at Citigroup

FINANCIAL BACKPACK

Chair: **Gerri Facchine**

Committee Purpose and 2010-2011 Objectives

The Financial Backpack program is designed to prepare students and young adults for real life after high school in the areas of personal finance and financial security.

The primary focus is to ensure that Financial Backpack participants will have:

- Received the appropriate information to enable them to take responsibility for their financial decisions
- Developed an initial understanding of the financial services industry and its impact on the economy
- Created a basic financial plan to serve as a basis for future financial planning
- Learned how to organize their personal finances and use a budget to manage cash flow
- Understood the building blocks to create a simple investment strategy that ties to personal financial goals

The Committee sought out and leveraged additional partners in the New York City area, as well as those within the FWA Next Generation, to further their goal in reaching more students during this third year of the program and in building audience for subsequent years.

Accomplishments/Highlights

- A continued partnership with the Virtual Enterprise International program which provided over 300
- NYC high school students with instruction in banking, financial planning and investing through two sets of workshops held in both the fall and spring.
- A workshop delivered to more than 100 girls enrolled in Girl Scouts of America troops located across the New York City area.
- Maintained and expanded partnerships with organizations that resulted in delivering our program to almost 140 young adults from diverse partners that included: Jeter's Leaders Turn 2 Foundation, The Door, iMentor, Fast Track, and the High School of Finance and Enterprise.
- A series of seven weekly workshops that covered financial literacy, banking basics, financial planning, credit and identity theft for 20 students at the High School of Economics and Finance.

Recommendations for the Future

- Continue to expand our alliances with community partners and organizations.
- Increase the number of students and young adults to whom we deliver, share, and customize our program.
- Expand our outreach, enlistment, and training of an active pool of FWA volunteers.

Special Thanks

To HSBC for their generous grant and ongoing support; to all the dedicated volunteers; and to the FWA office for their help, in particular Elizabeth Knoop, Program Director, and Nancy Sellar, FWA Executive Director.

Participating Committee Members

Pat Behnke
Mindy Youse-Warde

Marie Pedraza (HSBC representative)
Michelle Wong

Lindsay Starr

FINANCIAL LITERACY

Co-Chairs: **Mimi Carroll**
Cindy Gerhard, Citi

Committee Purpose and 2010-2011 Objectives

The seven week program teaches financial skills to women who are entering the work force through training programs. FWA members teach each class with the assistance of a peer trainer who leads the discussion. The core skills we teach are:

- Cash flow and budgeting
- Use of credit cards
- Getting out of debt
- Using benefits
- Taxes
- Investing to achieve your goals

We teach the fall class at NEW, Nontraditional Employment for Women. This Organization trains women to be plumbers, electricians, carpenters, etc. and places them in Unions, where they work as apprentices and eventually get their journeymen's license.

The spring class is conducted at The Grace Institute. This organization trains women in business skills and places them in jobs with benefits.

For both institutions, the participants are recruited from past graduates of their respective program. Between the two programs, we graduate approximately 50 students.

FWA members get to benefit by sharing their knowledge and presenting the material before a group in a relaxed atmosphere. We train the FWA members by having them observe the session they wish to teach. The following semester they are eligible to team teach the session with another FWA member. After that they may teach it solo or train another eligible FWA member.

FWA members train the peer trainer who is pulled from the population of training program graduates. We also employ a peer administrator who takes care of attendance, purchasing and distribution of materials and the graduation party. Our graduation is at a local restaurant where we have a dinner, present a few speeches and hand out certificates to the graduates.

Accomplishments/Highlights

The program was instituted in 2004, and this year marks the 4th year with NEW and the second year with Grace Institute. Each year we identify a few initiatives to improve the program. This year, the initiatives covered the course materials and the depth of our teaching roster.

- Course Materials – We focused on improving the handouts and teaching guides for the benefits and investment sections of the program. The materials were updated to reflect any changes in regulations and market conditions.

- Teaching Roster – We are always looking for members who have an interest in teaching the classes, especially those with specializations in bankruptcy and tax. This year’s successes were:
 - Introduction by one of our committee members to two new contacts with experience as bankruptcy lawyers to expand our roster on this topic.
 - Participation by five new Committee members in attending our classes and conducting a session.
- Other changes – During the past several years we offered a one-on-one financial planning session to each student who completed the program. However, last spring the Science, Industry and Business [SIBL] branch of the New York Public Library introduced its *Financial Literacy Now* program, which offers one-on-one consultations with a certified financial planner. Now we provide our students with literature about the program and instructions to sign up for an appointment and encourage them throughout the program to take advantage of this opportunity.

Recommendations for the Future

Teaching financial literacy is a dynamic process. The material must be kept fresh and updated. We always need to expand our roster of volunteers to insure that we have enough trainers and coordinators to run the program effectively. We are also frequently approached for suggestions on how to expand the program to a wider audience.

- One of the options considered for training and program expansion was to videotape our classes. However, the cost and resource commitment for the project are not feasible at the present time. We will keep this initiative in mind for the future.

Special Thanks

Our gratitude to E*Trade for sponsoring our program and being supportive of our mission. To our partners at Nontraditional Employment for Women and The Grace Institute, we could not do this without you. Thanks for recruiting such great women, giving us a place to teach, choosing terrific peer trainers and administrators, and welcoming us to your organizations. We have a phenomenal committee. Everyone has great intention and spirit and it is a joy to work together.

Participating Committee Members

- | | | |
|----------------------|-------------------|-----------------------|
| Maitri Butcher | Maureen Carpenter | Mimi Carroll |
| Christine Cirillo | Anna K. Curry | Ann Diamond |
| Jennifer French | Cindy Gerhard | Donna Gross |
| L’Hava Israel | Evelyne Klein | Rachel Lurie |
| Catherine Oberlander | Toni Savage | Margaret Schramm-Horn |
| Gloria Scott | Erika Walker | Audrey Whitworth |

FUND RAISING - FWA ANNUAL DINNER

Co-Chairs: *Isabelle Bordas, Deloitte & Touche LLP*
Valerie Simson, Badger Financial Group

Committee Purpose and 2010-2011 Objectives

The FWA Annual Dinner committee is charged with producing the premier Fundraiser of the FWA of New York Educational Fund, and making it as financially successful, as well as enjoyable, as it can be. The 2011 Annual Dinner and 27th Women of the Year Awards, held on May 19, 2011, honored two outstanding women:

- Our Private Sector Honoree – Irene Dorner, President & CEO, HSBC Bank USA, N.A.;
 - Our Public Sector Honoree – Sylvia Ann Hewlett, Founding President, Center for Work-Life Policy.
- Emceed by Sue Herera, “Power Lunch” Co-Anchor, CNBC, the dinner flowed seamlessly.

Accomplishments/Highlights

This year the Annual Dinner raised approximately \$225,000 net with over 600 people in attendance. This was comprised of 38 corporate tables as well as approximately 150 individual tickets sold.

- In 2011 the prices for both non-president circle tables and FWA members were raised to \$10,000 and \$200 respectively to better reflect the market place for similar events.
- Our Mentorship program speakers were Sequenza Williams (Murry Bergtraum High School) and Nancy Mui (Baruch College, CUNY)
- We continued the online journal for promoting the event and sponsors, but reduced expenses and increased efficiency by bringing it in-house, and having the FWA staff produce and manage.
- We recognized BMO Capital Markets \$1.2 million contribution to the FWA of NY Educational Fund over the past 6 years – heard remarks from Pat Cronin, Head of Trading Products, BMO Capital Markets, who announced BMO will once again next year include the FWA in their Equity Through Education program
- The DAIS of 28 executive leaders included women and men from our President Circle firms as well as community partners
- We celebrated significant milestones of the FWA Ed Fund and years of service to the community. This marked the 35th anniversary for the Wall Street Exchange program, 25th anniversary for the Murry Bergtraum High School Mentoring program, 10th anniversary for the Financial Backpack program, and 5th anniversary for the FWA-BMO Endowed Scholarship Fund at Baruch College, CUNY

Recommendations for the Future

- Begin planning for the following year dinner immediately after the end of the current year
- Engage into table sales conversations with companies during the fall. Some of our targets mentioned that they would not be able to contribute to the dinner unless it is written in their budget.
- We created a spreadsheet this year that listed all targeted companies and associated to them a contact name when available. Consider leveraging this list early in the process to identify missing contacts and researching for point of entry for these companies

Special Thanks

- Lily Klebanoff Blake for her leadership and active support of all aspects of the Annual Dinner
- Jennifer Durst and Nancy Sellar for their counsel, effort, countless hours and endless patience
- The FWA office team and in particular Lisa Buddenhagen and Anja De Rosa
- FWA president's circle members who assist through sponsorship and endorsement of the event
- Patti Domm for making possible having such a great Emcee, Sue Herera
- All the members of the FWA Board who generously responded to our appeals for advices and table purchases
- FWA members who kindly provided their help the night of the dinner

Participating Committee Members

Committee members:

Ana Deleon

Yumi C. Koh

Ella Newman

Tina Vizzini

Larry Goldfarb

Vicky Lee

Barbara Rand

Jill Wiseman

Alisha Kamminga

Paula Mueller

Sherry Rodriguez

Volunteers:

Cynthia Drew

Speech coaching:

Diane DiResta

FUND RAISING: FUND RAISING: HOLIDAY BENEFIT

Co-Chairs: Rose A. Napoli

N.Lorraine Baker, Prudential Douglas Elliman

Committee Purpose and 2010-2011 Objectives

An annual tradition of the FWA, the purpose of the Holiday Benefit is to raise dollars for the Educational Fund and provide an opportunity for members to gather in celebration of the holidays while reflecting upon the end of the year, with all of its accomplishments. The purpose of the committee is to arrange a rewarding, fun-filled, fundraising, fabulous FWA Holiday Benefit event.

- Coordinate with FWA senior leaders to identify a date, location and theme, based upon the FWA's International Conference
- Determine the location and caterer
- Organize logistical details and planning calendar, including budget, marketing, etc
- Solicit companies and stores for raffle donations (ex: jewelry, vacations, spa certificates, hotel stays and other products and services)
- Organize and schedule regular meetings and frequent communications with committee members and volunteers to keep the plan moving forward
- Arrange for entertainment in keeping with the international theme, which for this event was Brazil

Accomplishments/Highlights

The event was held on December 8, 2010 at the Ana Tzarev Gallery on 57th Street in midtown Manhattan. This elegant venue was generously donated to the FWA and provided a magnificent, festive setting for members and guests to meet and greet friends and colleagues and forge new business relationships.

The group enjoyed a variety of sumptuous Brazilian appetizers complemented by the Brazilian specialty cocktail, Caipirinha.

The highlight of the evening was an unprecedented live Samba performance by a native Brazilian dance team and percussion group.

The event attracted 180 members and guests. Approximately \$14,000 was raised for the Educational Fund.

Recommendations for the Future

- Begin the planning process as soon as possible, preferably early summer.
- Establish a date and select a venue as soon as practicable.
- Identify President Circle sponsorship/underwriting of the event early on.

Special Thanks

- The FWA expresses its appreciation to the Ana Tzarev Gallery for its generous venue donation, and all those who generously donated gifts and services for the raffle.
- The Holiday Benefit Committee expresses gratitude to the FWA office staff for its unrelenting support: Nancy Sellar, Jennifer Durst and Lisa Buddenhagen.
- A special thank you to FWA President Susan Ganz for her support and encouragement in allowing the committee to take innovative steps in executing its plan.
- Special thanks to Lily Klebanoff Blake for providing guidance and expertise in fundraising and international protocol.
- Many thanks to the FWA Board and Leadership Committee members who worked tirelessly at bringing in a wonderful array of gifts and services for the raffle.
- Heartfelt thanks to the Holiday Benefit Committee members for many, many hours of hard work throughout the planning process, securing donations and availing themselves at the event to ensure its success. Everyone's very active participation allowed us to reach for the best holiday event possible.

Participating Committee Members

- Special thanks to Joyce Sullivan for helping us spread the word far and wide and Frederick Smith for his assistance at the event.
- A special thank you to Baruch Mentees: Caroline Lu, Nancy Mui and Julie Zenou.

PRESIDENT'S CIRCLE

Chair: Lily Klebanoff Blake, Klebanoff International

Committee Purpose and 2010-2011 Objectives

Formed in 1998, the FWA President's Circle serves as the official corporate sponsorship program of the FWA. By working together as strategic and financial partners, the FWA and its President Circle supporters advance the FWA's core mission as the leading professional organization that connects, educates and advances women in business and finance.

Corporate sponsors benefit from a visible commitment to the shared FWA goals, membership for corporate individuals, and the opportunity to hold events on premises with special rate and privileges for employees, promotion in FWA communications and participation in the FWA Annual Dinner. President's Circle sponsors gain increased recognition for their support of women's leadership, facilitating their efforts to attract and retain key talent.

By providing individual relationship managers for all firms who are members of the President Circle, the President's Circle Committee ensures that the goals of member firms and of the FWA are met and that the FWA continues to enhance and strengthen its relationship with its corporate partners.

Accomplishments/Highlights

- Four new firms joined the President's Circle: Chartis, New York Life, RBC Capital Markets, and Wells Fargo Advisors at the Gold Level.
- Two firms, Citi and Deloitte, both longstanding members of the President's Circle, upgraded their membership to the Platinum Level.
- President Circle firms sponsored 47 FWA events, including strong participation in the FWA's International Conference in Brazil, and often provided speakers and venues for events.
- FWA membership recruitment events were held at three President's Circle firms, helping to increase FWA membership from those firms.
- A President's Circle Best Practices Breakfast on the Gender Equality Project brought cutting-edge thought leadership to members of the President's Circle.
- President's Circle Revenue targets were exceeded, enhancing the operating budget and improving the FWA's financial condition.

Recommendations for the Future

- Continue to strengthen and enhance relationships with existing President’s Circle firms.
- Provide access to thought leadership and opportunities to share best practices for members of President’s Circle.
- Recruit additional firms for the President’s Circle.

Special Thanks

- Susan Ganz, FWA President, for her strong support of the President’s Circle Program.
- Nancy Sellar, FWA Executive Director, for her good judgment and support.
- Jennifer Durst, FWA Director of Development, for her outstanding management of the President’s Circle program through coordination of activities with all member firms and FWA committees and ongoing outreach to potential corporate sponsors.
- Stephanie Ackler, Christine Birnbaum, Rosemary Bonelli, and Stephanie Hauge for their efforts in recruiting additional President’s Circle firms.
- The President’s Circle representatives at all our member firms and their colleagues for their help, cooperation, and support.
- Judy Mellars and Annette Stewart, Membership Committee Co-Chairs, for managing Membership Recruitment events at President Circle firms.

Participating Committee Members

Joanne Brady
Liz Farrar
Judy Mellars

Deidre Campbell
Louiza Ferrara
Lynthia Romney

Sheila Colucci
Anne Izzillo
Vanessa Van Brunt

GLOBAL AGENDA

Co-Chairs: Suzanne Matthews, Westchester Community College
Lene Skou, Baruch College

Committee Purpose and 2010-2011 Objectives

The objective of the Global Agenda Committee is to explore issues that have a current impact on emerging economies, emerging markets and the developing world. Our focus is to present programs which offer a dialogue on political, economic, or financial issues that are important not only to emerging nations but which also impact the rest of the global economy.

Accomplishments/Highlights

This past year we were proud to organize two successful events on important topics that not only served to educate our members, but also provided them with diverse new perspectives.

- In the fall we presented “Emerging Markets – 2010 and Beyond” which was a lively and informative panel discussion that dealt with the ins and outs of investing in the emerging world. The program, which was hosted by TIAA-CREF, included professionals from asset management, wealth management and commodities trading.
- In the spring the committee presented a panel discussion entitled “Creating Winning Brands Across Diverse Cultures – and the Power of Multicultural Marketing.” The program, hosted by Colgate-Palmolive, included talented and dynamic executives from companies with highly recognizable brand names in consumer products, financial services, luxury goods, and public relations. The panel members talked about their individual roles and how they work within their firms to leverage their brand and deliver messages across diverse consumer markets.

Recommendations for the Future

The feedback from our events was extremely positive, and our FWA members are keen to attend programs that offer insights into timely topics of global importance.

Special Thanks

Heartfelt appreciation goes to:

- Karen Elinski of TIAA-CREF for her valuable support and assistance with “Emerging Markets 2010 and Beyond.”
- Sally Phipps and Colgate-Palmolive for their support and underwriting of our Multicultural Marketing event.
- Sarah Dunn of Coach for her assistance with our Multicultural Marketing event.
- Jennifer Durst who has been so instrumental in connecting our committee to President’s Circle members.
- The FWA office for their efficient and helpful role behind the scenes.

Participating Committee Members

Many thanks to our dedicated committee members and others in the FWA who helped to make our programs successful:

Andrea Williamson
Paula Durand

Laura Schneider
Aleksandra.Sufleta

Eloner Habtezghi

INTERNATIONAL AFFAIRS

*Co-Chairs: Karen Elinski, TIAA-CREF
Simone Vinocour, BNP Paribas*

Committee Purpose and 2010-2011 Objectives

BRAZIL 2011 FWA International Business Conference (April 1-13)

The purpose of the International Committee is to develop the FWA's Annual International Conference and related programs to familiarize delegates with an economy in flux or performing with distinction. This is accomplished through substantial business, government and cultural programs that give delegates first-hand exposure to the country's commercial, cultural and political leaders. Our objectives this year focused on Brazil in developing the agenda, securing sponsorships and speakers, arranging cultural activities to convene the FWA conference in three Brazilian cities, April 1-13, 2011, along with several complimentary pre-trip events in New York City.

Accomplishments/Highlights

During the 2010-2011 season, the FWA International Committee convened the following events:

Pre-Conference Events:

- **Emerging Markets 2010 and Beyond – Opportunity, Risk and Value/** November 4, 2010: Partnered with Global Agenda Committee to present insights and information on emerging markets in terms of growth, areas of risk and prospects for sustained returns that were offered a panel of experts in the global markets arena including: Peter Newell, Vontobel Asset Management; Rebecca Patterson, J.P. Morgan Chase; Sanjeev Handa, TIAA-CREF; Navin Dave, KPMG.
- **Breakfast in the Tropics/** March 9, 2011: Dr. Steven Sanderson, President & CEO of the Wildlife conservation Society, joined us at the Central park Zoo for an insightful discussion on the WCS's conservation and sustainability efforts in Brazil and the surrounding region.
- **Morning of Portuguese Lessons and Taste of Brazil for Lunch/** March 12, 2011: Native Brazilian Marizete Browne, of BM & F BOVESPA in NYC and friend to the FWA, provided a three hour class and joined conference delegates for lunch at a Brazilian restaurant to practice what we learned in class!

International Conference in Brazil:

- **FWA's 26th Annual International Conference, April 1 - 13, 2011:** The FWA's 2011 International Conference marked the FWA's first convening in Brazil, including Sao Paulo, Brasilia and Rio de Janeiro. Brazil was the last of the BRIC countries for the site of an FWA international conference and it could not have been more timely. The trip included in-depth briefings by high level Brazilian financial, business and government leaders on the current state of Brazil's economy, current investment climate, public policies impacting its booming business period of growth, along with their expert perspectives on the challenges and opportunities ahead. We also enjoyed the phenomenal cuisine, sights and sounds of Brazil and even took a samba class.

[For a complete agenda, list and biographies of our distinguished conference speakers and description of our varied and substantive conference events, please consult the 26th Annual FWA International Business Conference Briefing Book that can be found through the International Committee's link on the FWA website.]

Recommendations for the Future

The FWA International Conference consistently provides many invaluable opportunities for our members. To build on the great successes of these conferences over the past twenty-six years, we recommend that we establish a sub-group of the International Committee that is formed specifically to continue to build on the international FWA bridges and professional connections that come out of each conference. This could be set up on a parallel track with the international conference planning group and each could come under the umbrella of the FWA International Committee. We can continue connections electronically, through FWA New York City hosted events and through FWA member participation in outside topical and timely events that broaden international connections. To the extent we are successful in inspiring the establishment of other FWA type groups internationally, this can also serve as the vehicle for sharing ideas, connecting with women leaders and communication about business issues of mutual interest. We believe that all of this will serve to leverage the success of the FWA's International conferences and aligns with the FWA's objectives to educate, connect and advance the global interests of the FWA and those of the individual delegation members and their companies.

We also recommend that we build in an optional community service/ charitable event into each future conference to build on the good will and team work generated from our annual visits.

Special Thanks

Susan Ganz, FWA President for her vision and selection of Brazil as the location of the conference; and the following FWA members who so generously supported our conference efforts: **Adrienne Glasgow** for planning the complex logistics for Sao Paulo, Brasilia and Rio de Janeiro; **Lily Klebanoff Blake** for sharing her wisdom and guidance in serving as our Executive Advisor and coordinating FWA President's Circle firms for conference sponsorships; **Patti Domm, Pat Morrill, Starlin Leitner and Rebecca Patterson** for their valuable perspectives and counsel in planning conference events; **Donna LaSpina** for arranging the NYC pre-trip events; **Deborah Kaye** for arranging for BNY Mellon's sponsorship of conference events; **Diane Wallace** for coordinating sponsor events with Deloitte; **Roe Bonelli** for coordinating Chartis, Inc's sponsor event; **Janet Zagorin** for coordinating Deutsche Bank's sponsor events; **Starlin Leitner** for arranging our trip to H. Stern; **Deborah Flanz** for coordinating ING's sponsor event; **Alexandra Tyler and Diane Reyes** for coordinating Citi's sponsor events; **Maureen Adolf and Brian Pickel** for coordinating Prudential's sponsor event; **Inwha Huh** for coordinating the presentation made by Banco do Brasil; **Suzanne Matthews and Lene Skou**, Co-Chairs Global Agenda Committee; **Rose Napoli**, Co-Chair of the Holiday Benefit Gala, for their valuable partnership; **Nancy Sellar**, FWA Executive Director, **Lisa Buddenhagen** and the entire FWA staff for all of their invaluable assistance in the conference planning.

Our FWA International Conference Corporate sponsors, and their FWA member executives, for their generous participation and support including: Banco do Brasil, BM & F BOVESPA, BNP Paribas, BNY Mellon, Citi Brasil, Chartis, Inc., Deloitte, Deutsche Bank, H. Stern, ING Bank, Prudential Financial and TIAA-CREF.

Leona Forman, President, Brazil Foundation, for arranging the panel on Brazil's Social Safety Net with Brazil Foundation's team in Brazil and

Thomas A. Shannon, Jr., **United States Ambassador to Brazil**, for welcoming the delegation into his home and arranging a country economic, political and cultural briefing by top members of his in-country team. A special thank you to U.S. Embassy Officers, **Alfonse Cortes** in Sao Paolo and **Steve Pozivak** in Washington, D.C., for coordinating these events with us

Marizete Browne for her enthusiastic support in arranging for the participation of the BM & F BOVESPA Stock Exchange, providing Portuguese lessons, and setting up our Samba Class in Rio for the conference delegation.

Thanks to **Robert Santamaria** of Event Travel Solutions, Inc. (ETS) and his on-site Havas colleagues in Brazil.

We deeply appreciate the contributions of our conference sponsors, distinguished guest speakers, and the many individuals and organizations that offered us advice and counsel during our planning process that led to a dynamic and successful conference.

Participating Committee Members

We want to extend a special thank you to our valued committee members for their enthusiastic and dedicated support:

Lily Klebanoff Blake (Executive Advisor)
Donna LaSpina (Pre-Conference Events)
Julia Holland Campbell
Patti Domm
Rose Napoli
Leslie Topfer

Adrienne Glasgow (Conference Logistics)
Jaya Dargan (Briefing Book)
Pat Morrill
Starlin Leitner
Roe Bonelli
Janet Zagorin

INVESTMENT POLICY

*Chair: Stephanie Ackler, CFA, Ackler Wealth Management
of Wells Fargo Advisors*

Committee Purpose and 2010-2011 Objectives

The mission of the Investment Policy Committee is to oversee for the Board the on-going policy, process, guidelines and management of the fund balances and investments in the Business League and Educational Fund accounts of the FWA.

Accomplishments/Highlights

- Maintained and updated a board approved 'Mutual Fund List'
- Maintained monthly updated investment summary reviews and held regular quarterly IPC meetings
- Began and implemented a 4% annual distribution from the investment portfolios to begin building up respective reserve funds
- Developed IPC Operating Guidelines for clearer on-boarding of new committee members

Recommendations for the Future

The committee recommends continuing the quarterly reviews of all the FWA investment portfolios. In addition include a semi-annual review of the investments and asset allocation to re-balance as needed and to also withdraw 2% of the portfolio balances (total 4% annually) to fund into the respective 'reserve funds' for the Business League and Education Fund (non-restricted account). Suggest an annual review of the board approved 'Mutual Fund Investment List' for any changes that are needed to this list.

Special Thanks

A special thanks to all the committee members for their time and input. Susan Ganz, thank you for your passion and energy you shared this past year with this committee and entire organization. And thank you to Nancy Sellar, FWA Executive Director and Barbara Cohen FWA Secretary. This committee continued to make great inroads to strengthening the process and procedures for better investment reviews and oversight, for orchestrating changes in the future as well as coordinating with the FWA Treasurer, her proxy and with the FWA office.

Participating Committee Members

Voting Members:

Stephanie Ackler: Ackler Wealth Management of Wells Fargo Advisors, Elaine Gilde: Grove Street Capital, Anne Izzillo: MorganStanley SmithBarney, Christiane Olsen: UBS

Non-voting Members:

Susan Ganz: FWA President, Karen Rockey: FWA Treasurer and Barbara Cohen, FWA Treasurer

LIFESTYLES

Co-Chairs: Name, Phyllis Haberman, Egret Capital Partners
Name, Jeannette Paladino, Write Speak Sell

Committee Purpose and 2010-2011 Objectives

The mission of the Lifestyles Committee is to create events that address lifestyle and personal issues for members, such as health and fitness, leisure, arts and culture, life stage and financial planning and family/parenting. The Committee also provides an opportunity for its members to build new relationships with other FWA members through committee work and our committee's holiday party and June end-of-FWA year dinner for committee members. Another goal is to help develop and prepare qualified committee members to move into FWA Leadership positions.

Accomplishments/Highlights

- **Emmelle.** Shopping and networking at the Emmelle flagship boutique. Everyone received a \$100 gift certificate towards a purchase that evening or later. The store's founder described the highs and lows of starting a company with one store on Madison Avenue that now has its fashions in boutiques around the country.
- **Chelsea Art Gallery Tour.** We visited several extraordinary cutting-edge art exhibits in Chelsea, heart of the gallery world, led by an art expert from New York Gallery Tours, who spoke about each artist. We saw electronic media, live performance art and glasswork among other media. The tour was followed by an optional lunch enjoyed by many who attended.
- **Theater Party, Performance and Conversation with the Artists.** The evening began with a wine and cheese reception prior to seeing "How I Fell in Love" written by Joel Fields. After the performance, the director and actors had an interactive conversation with the audience. Heather Henderson, FWA member and Abingdon Theater board member, underwrote and hosted the reception.
- **Speed Networking.** Our highly successful sixth annual program for building relationships and expanding your network was hosted and underwritten by Sidley Austin. Lifestyles co-chair Jeannette Paladino offered tips on networking and how to expand your circle of connections.
- **Sangria Tasting.** Held at the SideBar restaurant. Upon arrival, guests were served classic red sangria. The sommelier introduced five other white and red sangrias including Triple Berry and White Peach Mango. Guests enjoyed guacamole, fresh fruit and quesadillas with their drinks.
- **How to Manage Stress in Your Life.** Karol Ward, author of "Worried Sick and Find Your Inner Voice", discussed what to do when we feel off balance and worried during times of high stress. It was an evening to network and learn tips to use in coping with worry in our lives.

Recommendations for the Future

- Continue to organize events that are interesting and fun for both our current membership and to attract potential new members.
- Encourage networking opportunities both before and after each planned event.

Special Thanks

- Many thanks and gratitude to the FWA office for their unending support: **Nancy Sellar, Lisa Buddenhagen, Anja DeRosa, and Jennifer Durst**. Thanks for FWA President **Susan Ganz** for her support and encouragement.
- A special thank you to the following organizations for generously underwriting and/or providing us with event venues: Emmelle's Madison Avenue Store, Abingdon Theatre, Sidley Austin, and Latham & Watkins.
- Special thanks to FWA member Heather Henderson for her generosity in arranging the Abingdon Theatre festivities.

Participating Committee Members

Special thanks to committee members **Ichun Lai** for introducing us to New York Gallery Tours and to Karol Ward; **Susan Isquith** for hosting our committee holiday party; to **Diane Waller, Susan Isquith** and **Beverly Chan** for exploring alternative wine tasting venues and to **Susan Isquith, Beverly Chan** and **Lori Laub** for hosting committee meetings.

MEET & MINGLE

Co-Chairs: *Marguerite "Daisy" Platt, Merrill Lynch*

Committee Purpose and 2010-2011 Objectives

Networking, keeping in touch with other members and educating non-members about the FWA.
No fee, — no format program — no speakers — no advance registration
but plenty of good conversation.

Accomplishments/Highlights

- We held the Meet & Mingle events quarterly.
- The attendance on average was about 30 individuals.

Recommendations for the Future

Bi-monthly Meet & Mingle events instead of quarterly

Special Thanks

Brasserie 8 ½ Restaurant, the manager Michel Boyer, Joyce Sullivan and all of the FWA members who supported the event and helped me with the networking and marketing to non-members.

MEMBERSHIP

*Co-Chairs: Annette Stewart, Barclays Capital
Judy Mellars*

Committee Purpose and 2010-2011 Objectives

Main objective is to increase new members and encourage all current members to renew their membership. Promote the FWA Membership as the necessity for Financial Women.

Accomplishments/Highlights

- A very successful Summer Breeze Event was held in August at Arno Restaurant on West 38th Street.
- Various Firm Membership Drives at HSBC, Brown Brothers & BNYM
- Active presence at FWA events such as Scotch & Chocolate Men’s Initiative & Annual Dinner
- For the period of May 1, 2010 through May 31, 2011, 204 applications for membership were approved exceeding our budget of 184. Of those, 25 were for reinstatement, 15 were executive, 8 were associate and 6 were scholarship, with the remaining being for full membership.
- We started the year with 858 renewal notifications being sent, of which 673 or 78.4% were renewed by the end of January. The renewal rate this year was down slightly from previous years.

Recommendations for the Future

We would always recommend continued membership drives and push for renewals. Our philosophy is that every event should be viewed as a membership opportunity. Every years has its challenges, but involving leadership for new member and renewal drives is critical for success

Special Thanks

Many thanks to our leadership for their enthusiasm in promoting the FWA to prospective members and encouraging others to renew. Thanks to Susan Ganz for her ideas and support. Last, but not least- thanks to the committee for their time, attention and review of applications.

We would also like to thank all the members who took the time to get to know and propose or sponsor our new members, most notably the following: Joyce Sullivan with 12 applicants proposed, Susan Ganz with 8 applicants proposed, Stacy Lauren-Musi and Alex Tyler each with 7 applicants proposed, Raleigh Mayer proposed 6 applicants and Anne Izzillo proposed 5.

Participating Committee Members

Joanne Brady
Catherine Parisi
Daisy Platt

Teodora Spasova
Lindsay Pease

Silvia Medina
Teodora Coppola

MEN'S ALLIANCE

Co-Chairs: Charles Bernard, Criteria for Success
Deborah Kaye, BNY Mellon
Frederick Smith, UBS Financial Services

Committee Purpose and 2010-2011 Objectives

- The goal of the FWA Men's Alliance is to provide a forum that fosters genuine dialog between men and women in business, with particular emphasis on concerns regarding financial related industries, and with an emphasis on advancement.
- The Men's Alliance plans to sponsor fun events and substantive forums that: connect men and women on a professional level; broaden leadership diversity in organizations; educate men and women to work together more effectively; and focus participants on acting as change agents for women's and men's leadership.
- Through our ongoing discussions and events, we: encourage men and women members and guests of the Financial Women's Association to learn to work more effectively with each other in business; engage men and women in advancing their respective careers; and solicit specific input from men on the advancement of women.

Accomplishments/Highlights

- Single Malt Chocolate – *sold out*
- Guiding Careers: The Color Q Personality Workshop for Adults and Kids – *sold out*
- The Fearless Sales Person – *sold out*

Recommendations for the Future

We encourage FWA members to attend Men's Alliance events, join our committee, invite guests, sponsor new members and spread the word about this initiative among financial professionals and potential corporate sponsors.

Special Thanks

Susan Ganz, President
Lisa Buddenhagen, Director of Operations
Debevoise & Plimpton LLP
The Macallan
BNY Mellon Women's Initiative Network (WIN)
Annie Merkle
James Fisher
Andrea Nierenberg
Gretchen Shugart
Stella Lagudis
Paul Neuman's Catering

Nancy Sellar, Executive Director
Anja DeRosa, Event Coordinator
Subserveo Inc.
Vosges Chocolat
Shoya Zichy
Tanya Straker
Weil, Gotshal & Manges
Jacqueline Wales
Mark Hemenetz
Charles Bernard
FWA Social Media Team

Committee Members

Charles Bernard
Victoria Fillet
Wyeth Killip

Lily Klebanoff Blake
Larry Goldberg
Linda Lerner

Deena Coffman
Janet Handal
Freddy Smith

Liz Farrar
Deborah Kaye

MENTORING

Co-Chairs: Francoise Jeanpierre; Columbia University Medical Center

Wendy Leibowitz; Leibowitz Marketing Services Inc.

Committee Purpose and Objectives

The Mentoring Committee helps extend the FWA's mission to connect, educate, and advance women to the next generation of business leaders. Since 1986, the Committee has provided one-on-one mentoring, beginning at the high school level at Murry Bergtraum HS for Business Careers and in 2001 with a program at Baruch College. Mentors share their professional knowledge and experience with mentees and assist mentees in developing critical thinking skills and in developing confidence in making wise choices.

At the high school level the program emphasizes staying in school and doing well, as well as helping the students prepare for and select appropriate colleges. Educational, cultural and social programs serve to widen the mentees' world and experiences.

The college program is more focused on career and professional development with programs targeted to beginning careers and advancement, as well as developing networking and presentation skills.

The Committee is expanding its mentoring reach through the development of an online community, FWA Mentee Connect. Our objective has been to have a "live" website by end of May, 2011; we expect to have a Beta version by mid-June and to begin enrolling our first group of online mentees. The online community has been conceived, initially, as a way to keep the Murry Bergtraum graduates/FWA scholarship recipients connected to the FWA and to provide support for their college years, ensuring their academic success. Bergtraum grads are generally scattered among various colleges and the FWA and Mentoring Committee wish to continue mentoring them. The online community will also include the Baruch mentees and serve as an additional resource for them. The Committee envisions that in the future, as the online community is developed, membership will be extended to other college students (for example: students participating in the Wall Street Exchange program and students participating in programs offered by FWA Presidents' Circle companies).

Accomplishments/Highlights

Murry Bergtraum HS

- The school welcomed a new executive principal, Dr. Andrea Lewis. Dr. Lewis has a 3-year mandate from the Department of Education to return the school to its former academic stature. Dr. Lewis re-organized the administration and staff, as well as making adjustments to the school's five learning communities. She is committed to working with the Committee to insure our program's continued success at the school.

Programs conducted for our mentees/mentors at MB included:

- Kick-off dinner hosted by the mentees in October.
- October to April: Computer course, funded by E*Trade and taught by an outside instructor. The class met once/week and covered Microsoft Word, Excel, Powerpoint and Publisher. Ten mentees participated.

- November: Two workshops offered to mentees: Essay writing, conducted by Emily Stone; and College Application Process and Financial Aid, conducted by Heather McDowell, Associate Dean of Admissions and Financial Aid for Sarah Lawrence College.
- March: Viewing of documentary film, Seneca Falls. The film chronicles a visit by a group of high school girls to the 150th anniversary celebration of the first Women’s Rights Convention. Viewing was followed by a lively discussion. The Committee purchased this film and it will be available for future viewing and use by the FWA and the Committee.
- April: Beginning of the SAT prep class for junior mentees. The twice/week class is provided by Princeton Review for our mentees and is held at MBHS. The class prepped the mentees for the June SAT exam.
- May: Private tour of City College for our mentees. Thirteen mentees went on the tour.
- June: Group of mentors/mentees attended a Mets game at Citi Field. Tickets were courtesy of the Department of Education’s Mentoring Partnership program.
- June: Closing dinner at MBHS hosted by the mentees and celebrating our graduates.
- Baruch
- September: Kick-off luncheon for mentors/mentees.
- October: Bank of Tokyo Panel: Voices of Experience. Panel of experienced professionals from the bank discussed the complex issues of today’s business world. Program hosted and held at the bank.
- November: Luncheon meeting topic: Branding Yourself for Distinction. Session led by FWA member Diane Baranello, coach and corporate trainer.
- February: UBS Panel: How to Find Your Career Path in Financial Services. Four UBS professionals discussed their careers and opportunities at UBS. Hosted and held at UBS.
- April: Luncheon meeting topic: The Story Behind the Resume. Discussion led by an FWA mentor and a search firm Senior Account Executive about factors influencing the hiring process.
- June: Closing dinner.

In addition, two focus groups were conducted with Baruch mentees to review the learning modules developed for the online community. Positive feedback was received as well as several suggestions for additional modules that the mentees believe will be very helpful.

- Joint Programs:
 - December Holiday Event: Lunch and performance of the Blue Man Group attended by mentors/mentees of both programs.
 - February: Mentor Appreciation Event held at home of mentor Margaret Horn. Open to mentors of both MBHS and Baruch, the program feature FWA member and executive coach Raleigh Meyer leading a discussion on setting ground rules.
 - May: Bowling party for mentors/mentees.
- Other:
 - Development work continued on the new online community. To date we have completed:
 - Interviewing Skills learning module
 - Networking module
 - Day in the life video: BMO Investment Banker
 - Day in the life video: Auditing Services; Deloitte & Touche, LLP
 - Beta version of new FWA Mentee Connect web site for the online community.
 - Completion of Mentoring Committee marketing brochure.

Recommendations for the Future

- Seek continued funding to offer the computer class at MBHS. Funds needed for instructor as computers and syllabus material was previously paid for.
- Increased scholarship assistance for Baruch mentees and for MBHS scholarship winners.
- Development of additional programs, such as funding internships or foreign study for Baruch mentees, using grants from BMO.
- Continued development of the online community: Signing up targeted mentees; recruitment of community mentors (neighborhood leaders); funding for site administrator; funding for additional learning modules; day in the life videos; and other resource material. Additional development for the web site to ensure it is an appealing, dynamic and vibrant community.
- Continued recruiting for the one-on-one programs.

Special Thanks

Murry Bergtraum:

Special thanks to Dr. Andrea Lewis, Executive Principal, for her vision and continued support for our program and recognizing its importance to the success of the school.

Special thanks to Tom Zarillo, Assistant Principal, and Danille Kobet, MBHS Faculty, for their time, energy and commitment to the program, and for the selection and supervision of the mentees and program at the school.

Baruch:

Special thanks to Alyce Mayo, Director of Entrepreneurship, Baruch and faculty advisory/administrator of our program at Baruch. Alyce's unfailing work and guidance as well as support for the FWA and mentoring ensure our success. Thanks also to the Financial Aid office at Baruch for administration of the FWA/BMO scholarship.

FWA:

Special thanks to Susan Ganz, Susan Perry and the Ed Fund Board for their support during the year.

Special thanks to Nancy Sellar, FWA Executive Director and her staff for their guidance and behind the scenes support to the Committee.

Very special thanks to all the FWA women who have stepped forward to give their time and energy in being mentors. Thanks to those who offered their advice, support and services as speakers and panelists for the many programs offered throughout the year.

Other:

The members of the Leadership Group who plan activities, discuss and solve problems, and manage the programs: Francoise Jeanpierre and Wendy Leibowitz, Co-chairs; Ellen Cahill; Margaret Schramm Horn; Beth Dorfman; Denise Seegobin; Phyllis Haberman; Patricia Lucey; Gerri Facchine; Yolanda Crawford; Alyce Mayo; Tom Zarillo; Danille Kobet; Susan Perry; Natalia Kolbun.

Participating Committee Members

Baruch Mentors:

Jane Bernardini; Christine Birnbaum; Sharon Brouillette; Ellen Cahill; Pat Cappeto; Yolanda Crawford; Marnie Eveline; Gerri Facchine; Joanne Feierman; Meghan Gorman; Mary Greenebaum; Danielle Harrington; Stephanie Hauge; L;Hava Israel; Heather Judnick; Patricia Kozu; Karen Lavi; Christine Li-ayeung; Ann Lemon; Maureen McCarthy; Moira McGrane; Patti Mittelman; Andrea Neumann; Olena Paslawsky; Susan Perry; Francine Riemer; Natalia Ruderman; Jill Shann; Ruth-Ellen Simmonds; Laura Smith Dunaief; Gail Vennitti.

Murry Bergtraum Mentors:

Stephanie Lew; Cynthia Drew; Eloner Habtezghi; Tara Malloy; Peggy Decker; Mary Anne Liss; Patricia Lucey; Jennifer Guarino Sullivan; Susan Jankowski; Frances Melville; Amy Arthur Sammuels; Alaina Sparks; Phyllis Haberman; Margaret Schramm Horn; Shweta Faiji; Rosemary Saurer; Annette Stewart; Linda Kenyon; Barbara Cohen; Loretta Roland; Marilyn Thypin; Beth Dorfman; Holly McNulty; Jocelyn Shields; Fai Yei.

MICROFINANCE

*Co-Chairs: Ann Miles, BlueOrchard Finance USA, Inc.
Monique McClure, New York Life Investment Management, LLC
Elizabeth Lynch, Women's World Banking*

Committee Purpose and 2010-2011 Objectives

The mission of the Microfinance Committee is to inform and educate the FWA membership and the public about microfinance and to support microfinance initiatives throughout the world through non-financial and financial means.

Accomplishments/Highlights

- This year, the FWA will direct the Lenore Albom Microfinance Giving Program to Fonkoze, the largest microfinance institution in Haiti. Fonkoze has over 50,000 borrowers and 200,000 savers across the country. The institution's clients—low-income entrepreneurs and their families in Port-au-Prince and nationwide—were severely impacted by the earthquake that ravaged the country in January 2010. This is the second year the Lenore Albom Microfinance Giving Program has supported Fonkoze.
- On **Nov 9, 2010** the committee organized a panel, The Rise of Microfinance in the U.S. Panel participants included recognized leaders in the industry and a microentrepreneur client of ACCION USA. The event was sponsored by Citigroup, a member of the President's Circle.
- On **Mar. 30, 2011**, the committee organized a panel, Will Microfinance Succeed in the BRIC Countries? Does Regulation Matter?. Panel participants included recognized leaders in the industry. The event was sponsored by Morgan Stanley, a member of the President's Circle.
- On **May 23-24, 2011**, the members of the committee spoke on two panels at the Microfinance USA Conference. In addition, the FWA sponsored a table at the event which was covered by members of the committee.

Recommendations for the Future

The committee will continue its focus on developments in microfinance. We may also consider broadening the range of topics to address adjacent areas of development in micro-insurance, micro-leasing, health, housing and education. Impact investing has also commanded a lot of interest from socially motivated investors to invest in social enterprises like microfinance which address the needs of the poor. The committee believes this will engage the public at large and potentially bring in more FWA members.

Special Thanks

Citigroup and Morgan Stanley for their sponsorship of the Nov. and March events.

Participating Committee Members

Anna Curry, Andrea Esposito, Andrea Turner, Ann Miles, Audrey Whitworth, Elizabeth Lynch, Kimberly Williams-Weinrick, Mary Lynn Halland, Monique McClure, Naeemah Lajoie, Susan Hume, Laura Schneider, Aleksandra Sufleta, Nelun Weijeratne

NOT-FOR-PROFIT

Co-Chairs: *Katrin Dambrot, The Governance Group*
Fran Smyth, Arts and Business Council of New York

Committee Purpose and 2010-2011 Objectives

The mission of the Not-For-Profit Committee:

- To create programming that interests and responds to the needs of FWA members
- To attract members to FWA from the nonprofit sector and those potentially interested in entering that sector
- To provide a networking resource to nonprofit and for-profit professionals
- To expand our programming beyond Manhattan

Accomplishments/Highlights

The Not For Profit Committee had a good year:

- **On September 14th** we hosted a board matching event featuring New York City's Chief Service Officer, Diahann Billings-Burford, 8 not-for-profits organization representatives and an excellent (more than sold-out as we increased the maximum number of attendees twice and still had walk-ins.) turnout of interested potential board members.
- **On January 27th** we presented a session on B Corporations, taking our cue from the Micro-Finance Committee's expressed interest in this topic. Florry Wilson, of B Labs, explained this new corporate form. Despite a snow storm we had a significant turnout.
- **On March 10th** in a severe rainstorm Betsy Worley led another Transition Panel session, doing her usual superb job. Once again we tested the mettle of our audience with the weather but we FWA folks are a hardy group.
- **On April 27th** we did another board matching event, this time in conjunction with the FWA of New Jersey. We didn't match September's turnout – not sure we will ever – but an enthusiastic crowd and 7 not-for-profits had an excellent time and several connections were made on the spot.

Recommendations for the Future

- Continue to assist those in transition to the non-profit sector by providing useful information and the ability to interact with those who have done this.
- Provide opportunities for interested members to meet non-profit organizations looking for board members.
- Explore the possibility of creating a volunteer matching process for FWA members.

Special Thanks

Thank you to the FWA Officers, Executive Director, and Staff for their help and unending patience with us. A special shout-out to Lisa Buddenhagen who is incredibly helpful, unfailingly cheery, and amazingly patient. Our vow for next year is not to pester her with so many changes and updates.

Thank you to Bernstein Wealth Management, Arts and Business Council of New York, and McCarter English for providing meeting space. Thank you to Sobel and Associates for supporting the April 27th event.

Thank you to our speakers – all terrifically knowledgeable and helpful.
Thank you to our committee members:

Participating Committee Members

Sanem Alkan
Claire Davis
Joanne Dillon
Heather Henderson
Ethel Hill
Marisha Kathuria

Neemah LaJoie
Maureen Levi
Sara Mahn
Christa Schantz
Harriet Shoheit
Rosemarie M. Stabile

Christy Turner
Cindy Pehlam-Webb
Betsy Werley
Kathy Yohalem

PROFESSIONAL DEVELOPMENT

*Co-Chairs: Peggy Decker, KnowledgeSources
Jeri Quinn, Driving IR*

Committee Purpose and 2010-2011 Objectives

The mission of the Professional Development Committee is to provide members with tools and techniques to enhance their personal and professional development as well as manage their careers through these times of continual change.

Accomplishments/Highlights

- **Managing Your Career, Leveraging your Assets.** Special Career Event with Dr. Beverly Kaye of Career Systems International. Dr. Kaye introduced a five-step career planning process and interviewed several prominent women in finance about their career choices. November, 2010. Over 100 people in attendance. Hosted by Bank of New York.
- **Keeping Trust in a Crisis: A Competitive Advantage.** Crisis Management Event with Fred Garcia of Logos Consulting. Fred described best practices for protecting an enterprise's reputation and other measures of competitiveness when things go wrong, how those who lead organizations can maintain the confidence and trust of internal and external stakeholders. December, 2010. Over 75 people in attendance. Hosted by HSBC.
- **Executive Impact and the Power of Presence.** Event with Bridgitt Haarsgaard of The Point Consulting Group. Bridgitt explored the critical ingredients in building a strong executive presence to influence and inspire people to achieve goals. April, 2011. 40 people in attendance. Hosted by Crowell & Moring.
- **11th Annual Credit Suisse Coaching Summit.** This signature event was originally scheduled for June, 2011 but is being moved to September, 2011. The umbrella theme this year will be Leadership and focus on developing this at every stage of your career.

Recommendations for the Future

- Execute on the CS Coaching Summit. Target attendance is 250.
- Plan 'So you want to be coached?' a coaching event using FWA's own coaches and consultants
- Gain an understanding early on in the year of PC company and PC prospect needs to assist in creating events that these firms are interested in supporting.
- Build up the committee

Special Thanks

Thank you to our corporate underwriters who provided venues, support and underwriting: **BNY Mellon, HSBC, Crowell Moring.**

Participating Committee Members

Tracey Taylor
Susan Sommers

Lorraine Heber-Brause
Vera Nazarova

Jennifer Sullivan

PROFESSIONAL SERVICES LIAISON

Co-Chairs: Cheryl Gorman, Gibbons P.C.
Susan Migliaccio, PricewaterhouseCoopers LLP
Lisa Ryan, Fragomen, Del Rey, Bernsen & Loewy, LLP

Committee Purpose and 2010-2011 Objectives

The mission of the Professional Services Liaison Committee is to share the FWA membership benefits and networking opportunities with professional women throughout the legal and accounting fields by co-sponsoring events of mutual interest among lawyers, accountants and other FWA members.

Accomplishments/Highlights

- 2010-2011 - Monthly Board Meetings hosted by PricewaterhouseCoopers LLP;
- July 2010 - Summer Dinner at Kellari (Committee only social event);
- January 2011 – Winter Dinner at Circus (Committee only social event);
- March 2011 - Women Trailblazers: Pathways to Executive Level Success at the New York County Lawyers' Association; and
- May 2011 - PSLC Table at FWA Annual Dinner (Educational/fundraising event).

Recommendations for the Future

None at this time.

Special Thanks

Special thanks to the PSLC Co-Chairs Cheryl Gorman (Gibbons P.C.), Susan Migliaccio (PricewaterhouseCoopers LLP) and Lisa Ryan (Fragomen, Del Rey, Bernsen & Loewy, LLP) for their excellent leadership and to the following individuals for their contributions to the Women Trailblazers event: Susan Harper (Baritz & Colman LLP) (event chair/moderator), Susan Migliaccio (PricewaterhouseCoopers LLP) (reception support), Susan Kintner (Strategic Legal Solutions), Patricia Pope, Deborah Kaye (Bank of New York/Mellon), Charles Bernard (Criteria for Success, Inc.), Suzanne Rocheleau (Cantor Fitzgerald) and Ella Newman for assisting with the event, as well as their individual contributions and leadership to the committee and the FWA. We would also like to thank those who attended these events.

Participating Committee Members

Marie-Therese Allen	Jennifer Anderson	Susan Aufiero	Jennifer Bergenfled
Barbara Bettman	Charles Bernard	Pat Cappeto	Jean Cleary
Robin Fisher	Judith Fleischer	Hongli Gao	Cheryl Gorman
Katie Gummer	Susan L. Harper	Sally Ann Hughes	Deborah Kaye
Noreen Kelly-Najah	Loretta Kendle	Susan Kintner	Linda Lerner
Carol Livolsi	Laurie Liu	Susan Mangiero	Susan Migliaccio
Patricia Pope	Suzanne Rocheleau	Lisa Ryan	Sareena Sawhney
Kelly A. Skalicky	Fred Smith	Kathryn Wallace	

SCHOLARSHIPS - UNDERGRADUATE SCHOLARSHIPS

Co-Chairs: *Seegobin, Lehman College/FINRA*

Committee Purpose

We want to forward the organization's mission by giving financial assistance to promising and deserving young women pursuing business careers. In addition, formal and informal meetings, for both scholarship programs, enable us to offer career guidance and networking opportunities to the next generation of financial women, in keeping with our mission.

2010-2011 Objectives

Leah Pfeffer-Lidsky, Undergraduate Scholarships

- Sustain the undergraduate scholarship program and continue to encourage the development of lasting ties between and among current and former scholarship students, their mentors, Murry Bergtraum High School, the FWA and each other.
- Support the education of young women and encourage them to become involved with the FWA and its programs.
- Make academic achievement the cornerstone of the program.
- Focus on enriching the program through events and networking.
- Enhance the Google group message board to keep this committee up to date with technology.
- Continue to provide programs that enhance everyone's learning experience and opens new doors and opportunities for our recipients.
- Reunion Event will be held second week in January 2011 and Summer Event held in August 2012.

Accomplishments/Highlights

- Scholarships are awarded to qualifying Murry Bergtraum High School seniors who participated in the FWA Mentoring Program and who qualify on the basis of academic achievement. Qualifying high school seniors receive \$2,000 for their freshman year and \$2,000 for each of their sophomore, junior and senior years; depending on funding. Renewal scholarships continue to be subject to maintaining a 3.0 GPA in college.
- Since its inception in 1987, we have awarded over 129 scholarships to students and we continue to seek a strong interest in the program.
- On January 13, 2010, the undergraduate scholarship committee hosted its annual reunion dinner. This year's event focused on a Latin Theme, with a salsa lesson at Alvin Ailey Dance studio and then dinner.
- The Undergraduate Scholarship Committee held its 5th Annual Summer event. This event brings former and current scholarship recipients together for a day of culture and networking.
- The Committee continued its efforts to keep its web page for the current and former scholarship recipients accurate. This year we have created a "googlegroup" page for the current and former scholarship recipients to interact, post messages, and provide support to one another.

- The Committee through its new database continued our efforts to reach out to former scholarship winners. The committee has been working aggressively to locate and strengthen our ties with former scholarship winners, with our goal being to have them return and join the FWA and get involved.
- We researched and created a database for the College Connections committee. This database will be used to track current and former Wall Street Exchange participants of the program.
- We continued to sponsor the Princeton Review scholarships for Murry Bergtraum High School mentees, to prepare them for the SAT examination.

Recommendations for the Future

Enhance the Google group message board to keep this committee up to date with technology. Continue to provide programs that enhance everyone’s learning experience and opens new doors and opportunities for our recipients.

Special Thanks

The work of the Scholarship Committee could not have been achieved without the assistance of many individuals. Because each contribution was so important and unique in its way, we have listed those we wish to thank in alphabetic order.

- FWA Members and Staff: Farhanna Balgahoon, Susan Becker, Barbara Cohen, Cathleen Carroll, Lisa Buddenhagen, Feng Chen, Susan Ganz, Francoise Jeanpierre, Jenene Karamon, Wendy Leibowitz, Rosalind Lloyd, Karen Rockey, Nancy Sellar, Stephanie Hauge
- At Murry Bergtraum High School: Barbara Esmilla, Principal, Danille Kobet & Tom Zarillo

Participating Committee Members

Feng Chen

SCHOLARSHIPS - GRADUATE SCHOLARSHIPS

Chair: Susan K. Becker, Becker Consulting Services

Committee Purpose and 2010-2011 Objectives

The Graduate Scholarship Committee promotes the FWA's mission of advancing professionalism and developing future leaders by supporting graduate business education for second-year women at five NYC-metro schools: MBA candidates at Baruch, Columbia, Fordham, and Stern (NYU); and an MIA candidate specializing in Microfinance at Columbia's School of International and Public Affairs (SIPA). The schools select the scholars according to the FWA criterion of academic achievement and demonstrated leadership predictive of continued involvement in the FWA. The committee includes FWA Liaisons who are alumnae of each school. They are the point people responsible for strengthening the FWA presence on campus by sourcing speakers for school programs and events. Through relationships with students and staff at the schools, the Committee promotes the range of FWA resources and of the FWA member network.

As of the academic year 2010-2011, the FWA doubled the awards to \$10,000 per scholarship. To increase the pool of potential recipients for the increased awards, the awards are now merit-based, instead of restricted to students applying for financial aid.

Accomplishments/Highlights

- Continued to support the FWA "pipeline" of potential new members, through Committee involvement in campus events. This year, participation in the Columbia Women in Business (CWIB) annual conference surpassed previous records, as Columbia Co-Liaisons recruited speakers for four panels. Exemplifying Committee support of the "pipeline," the speaker on international development was a former Graduate Scholar at SIPA, now an FWA member. The Committee also placed a speaker at the Stern Women in Business (SWIB) Conference.
- Promoted the FWA and FWA programming committees through representatives of Director & Corporate Governance, Not-for-Profit, and Microfinance, who mentioned these FWA initiatives during their talks at the CWIB and SWIB Conferences. Arranged to have the FWA "Invest in Yourself" brochure included in 700 conference bags for the CWIB conference, 400 for SWIB, and 200 for the Fordham Women in Business (FWIB) Conference.
- At the request of SIPA's Director of Student Relations & Outreach, repeated the Committee's successful involvement in SIPA's Career Panels, for which the SIPA Liaison recruited finance specialists.
- Welcomed 2010-2011 Graduate Scholars to the FWA at a cocktail reception hosted by President's Circle company UBS.

Recommendations for the Future

The Committee will continue to explore new ways for its relationships with the Scholarship schools to support FWA objectives and the activities of FWA programming committees. It will also explore ways to include past Graduate Scholars in its outreach efforts.

In addition to the Committee's continuing and where possible enhancing implementation of its purpose, the Chair has recommended development of metrics to assess the performance of the Graduate Scholarship Program and institution of annual monitoring of schools' compliance with the criteria and timing for selection of scholars.

Special Thanks

Special thanks to FWA members who participated in programs at Scholarship schools and helped to source speakers: Nicole Sandford and Ziporah Janowski, Co-Chairs of the Directors & Corporate Governance Committee; Elizabeth Lynch and Ann Miles, Co-Chairs of the Microfinance Committee; Katrin Dambrot and Fran Smyth, Co-Chairs of the Not-for-Profit Committee; Sarah Kleiner Buitoni, Eunice Salton, and Laurie Shahon, who joined Nicole as panelists at the CWIB Conference; Elizabeth Lynch, who was a panelist at the SWIB Conference; Barbara Reguero, Liaison to SIPA, who recruited speakers for SIPA's Career Panels; and Helen Bord and Vera G. Nazarova, who arranged the Welcome Reception at UBS. Special thanks also to Jennifer Durst, who obtained sponsorship for the Welcome Reception and to the FWA Office staff for facilitating Scholars' registration for FWA events and producing the FWA marketing pieces in conference bags at the three "Women in Business" conferences.

Participating Committee Members

Susan K. Becker (Chair)
Helen Bord (Liaison to Fordham)
Kathryn Parter (Co-Liaison to Columbia)
Michele Wiemer (Liaison to Baruch)
Rita J. Victor-Littrean

Mary Tanaskovic Bitting (Liaison to Stern)
Vivian K. Holzer (Co-Liaison to Columbia)
Barbara Reguero (Liaison to SIPA)
Vera G. Nazarova

SPECIAL EVENTS TASKFORCE

Chair: Jyoti Bhagavan, Emergent Advisors

Advisor: Patti Domm, CNBC

Taskforce Purpose and 2010-2011 Objectives

Provide FWA members and President Circle firms exclusive value and access to thought leaders.

Accomplishments/Highlights

Mohamed El-Erian interviewed by Michelle Caruso-Cabrera - well received by the FWA and several media outlets - a member only and sold-out event!

The Financial Women's Association is proud to have held an exclusive members-only event featuring PIMCO CEO Mohamed El-Erian on the evening of October 25th, 2010. The event was elegantly hosted by FWA President Circle firm, The McGraw-Hill Companies, in their 50th floor space Midtown Manhattan. The sold out event with over 160 attendees included FWA Members, PIMCO employees and McGraw-Hill employees for both the cocktail reception as well as the formal part of the program. CNBC's Michelle Caruso-Cabrera interviewed Dr. El-Erian in a lively and engaging discussion that included his views on U.S. Treasuries, Greece's economic future, and gold, amongst other topics. The audience also had the opportunity to participate in a live Q&A. Attendees received a copy of Dr. El-Erian's book "*When Markets Collide*", courtesy of The McGraw-Hill companies, and had the opportunity to purchase Ms. Caruso-Cabrera's new book "*You Know I'm Right*".

This marquis event is the first of its kind. Attendees responded with extremely positive feedback and many asked when the next event of this nature will be. Several leading media covered the event, raising the profile of the FWA as an organization.

Recommendations for the Future

To strengthen this relatively new initiative's message of offering exclusive value and access to FWA Members and President Circle firms, further implement this philosophy consistently throughout FWA's activities.

Special Thanks

The FWA is grateful to both Mohamed El-Erian and Michelle Caruso-Cabrera for graciously participating in the event. Additionally, the FWA is appreciative of The McGraw-Hill Companies for its generosity in hosting and underwriting this event.

Participating Committee Members

Jyoti Bhagavan – Chair, Special Events Taskforce; **Patti Domm** – Advisor; **Stephanie Hauge** – Former FWA President (2009-2010); **Susan Ganz** – FWA President (2010-2011); **Beth Kanaga, Joanne Brady, Teodora Coppola** – Special Events Taskforce Members; **Lisa Buddenhagen, Rosalind Lloyd** – FWA Office; **Felicia Morton, Ryan Messick** – FWA PR Consultants

STRATEGIC MARKETING

*Cochairs: Joan Shapiro Green, National Council of Jewish Women NY
Lynette Lager, Synovate*

Committee Purpose and 2010-2011 Objectives

The goal of the Strategic Marketing Committee is to increase awareness of the FWA for the purpose of:

- Enhancing the value of the organization to the membership
- Increasing the value of the FWA to corporate sponsors (President's Circle, etc.)
- Increasing the number of FWA members
- Increasing contributions to the FWA Education Fund

Accomplishments/Highlights

Early in 2010, we worked with President Susan Ganz to develop key talking points for use in all interviews with the press. They were,

- The FWA advances women in business and finance. The organization showcases executive women as role models, panelists and offers educational opportunities to women for senior management and board positions. Top-notch programming and research by the FWA helps to promote women in key executive positions in corporations and on corporate boards.
- The FWA is an important organization for women in financial services; it offers opportunities for professional development, business development and connecting with other women in similar positions.
- The FWA offers corporations an opportunity to position themselves as a positive environment for women employees, showcase the returns on investing in women and leverage the organization's platform in advancing their corporate objectives.
- The FWA offers its members an opportunity to make a contribution to New York City metropolitan area through its mentoring programs at Murry Bergtraum and Baruch and its financial literacy initiatives. It also offers an opportunity to work on scholarship programs for college and MBA candidates. In 2010-2011, the FWA celebrates the 35th anniversary of its Wall Street Exchange program that is for college students entering their senior year; 25th anniversary of its Murry Bergtraum high school mentoring program and 5th anniversary of its adult financial literacy program.

We hired Morton Public Relations to raise the awareness of the FWA. Through their efforts, 21 articles have been published (so far) about FWA events or FWA members. These articles achieved more than 6MM impressions in print coverage, over 32MM impressions in online coverage as well as broadcast reach of 600,000 viewers. They covered the Mohamed El-Erian event, the initial event for the Men's Alliance, the FWA Annual Dinner, and a number of opportunistic situations that Morton Public Relations seized to secure press coverage. These articles included a number of interviews with President, Susan Ganz, that Morton Public Relations secured through careful work with the press. There are still a number of articles that are "in the works."

Recommendations for the Future

1. Update and enhance the FWA website; promote the website through search engine optimization.
2. Develop short surveys that take 5 or 10 minutes to complete to acquire timely reactions to issues; use results for articles or press interviews

Special Thanks

We appreciate the hard work done by Felicia Morton, Morton PR Inc., who worked very hard to increase FWA awareness.

Participating Committee Members

Susan Becker
Katrín Dambrot
Joan Shapiro Green
Lynette Lager
Barbara Shrager
Alexandra Tyler

Lisa Buddenhagen
Patti Domm
Bonnie Halpern
Donna Manz
Rosemarie Stabile
Jill Wiseman

Madhumita Chakrabarti
Gerri Facchine
Emily Kaller
Nancy Sellar
Joyce Sullivan

FWA REPRESENTATIVE TO THE INTERNATIONAL ALLIANCE FOR WOMEN (TIAW)

Chair: Lisa Mezzetti, Partner, Cohen Milstein Sellers & Toll PLLC

Committee Purpose and 2010-2011 Objectives

- Increase FWA members' awareness of The International Alliance for Women (TIAW), a global network consisting of over 50,000 businesswomen worldwide who join individually or by virtue of their membership in one of its 40 women's associations in more than 20 countries, including FWA. TIAW's mission is to serve as a global umbrella organization that unites, supports and promotes professional women and their networks to work together, share resources and leverage ideas. TIAW provides additional international connections for FWA and its members.
- Provide publicity for FWA in TIAW's electronic publications and on its website, both about FWA in general and FWA's events and programs through the year.
- Further the common interests of FWA and TIAW, which include the advancement of businesswomen and women business-owners, financial education for young women and girls, and improving the economic status of women worldwide, especially through microfinance efforts.

Accomplishments/Highlights

- Throughout the Year: recognition of FWA and promotion of FWA events in TIAW's *e-Connections* newsletter and at www.tiaw.org. A focus article highlighted FWA's programs and the many benefits of membership.
- Throughout the Year: connections made between FWA and businesswomen networks around the world -- including in Brazil for the International Conference Committee -- and for individual FWA members traveling on business or otherwise.
- President Susan Ganz met with TIAW's leadership during a trip to Toronto, and discussed possible connections between the two organizations; she then provided for a presentation to FWA's Leadership Committee about TIAW.
- In October 2010, FWA/TIAW Chair Lisa Mezzetti and member Hannah Sorscher attended TIAW's 30th Anniversary Global Partnership Forum and World of Difference Awards Ceremony, held in Toronto, and represented FWA at the separate Annual and Board Meetings. At the conference and awards ceremony, and in the conference handbook, FWA was publicized and given special recognition as a Charter Member of TIAW. In addition, three of our members won the TIAW World of Difference 100 Award, which honors women who have made an impact on the economic empowerment of women through a wide range of endeavors -- they are presented to "ordinary women who accomplish extraordinary things". The winners were Francoise Jeanpierre and Wendy Leibowitz, for their far-reaching successes in running the FWA Mentoring Program, and Denise Seegobin, for the special results reached by her leadership of FWA's Undergraduate Scholarship Committee and the College Connections/Wall Street Exchange Program. Each year, the FWA is entitled to three complimentary attendees at the TIAW Global event due to our Platinum-level membership.
- FWA members will be nominated for the 2011 TIAW World of Difference 100 Awards.
- President Susan Ganz and Chair Lisa Mezzetti have participated in TIAW's President Forums, international conference calls bringing the Presidents of the networks together.

- FWA members have been invited to attend conferences through connections with TIAW.
- TIAW members have provided information for FWA’s Job Listing.
- Availability to FWA members, at lower rates, to TIAW one-day meetings in its Global Cities Program (in recent years, in Toronto, London and Washington, DC).
- Representation of FWA at TIAW monthly Board Meetings.
- Publicity about TIAW and its events and awards in *FWA in Action*, through the President’s Message and at www.fwa.org.

Recommendations for the Future

- Ensure continued visibility on and growth of the FWA-TIAW relationship through leadership-level representatives in each organization.
- Confirm that FWA receives all benefits due it as a network member of TIAW, including publicity for FWA programs and events in TIAW communications.
- Continue to expand FWA member and President’s Circle member awareness of TIAW benefits, events and opportunities for networking, and seek an increase in FWA members’ use of the TIAW global network.
- Continue to explore methods to give FWA members direct access to TIAW news and benefits through passwords, direct mail sign-ups and directory listings.

Special Thanks

- FWA President **Susan Ganz**, for her support of the FWA-TIAW partnership, her commitment to the relationship, and her participation in TIAW’s calls and other meetings and communications with TIAW officers.
- FWA Executive Director **Nancy Sellar**, for her invaluable guidance and encouragement, and enduring good humor.
- TIAW Executive Director **Maxine Westaway**.
- Technology gurus: **Lisa Buddenhagen**, FWA, and **Allan Westaway**, TIAW.

WORKING MOTHERS

Co-Chairs: *Jane Giaquinto, U.S. Trust, Bank of America Private Wealth Management*
Maureen Nobile, Alliance Bernstein

Committee Purpose and 2010-2011 Objectives

The mission of the Working Mothers' Committee is to provide the opportunity for working mothers, expecting mothers via birth or adoption, empty nesters, and grandmothers to have robust discussions regarding the rewards and challenges we face or have faced as mothers in the work place.

Accomplishments/Highlights

Battle Hymn of a Tiger Mother (April 2011) by Amy Chua - FWA's first book discussion of 2011

In April, enthusiastic FWA members dialed-in to network and to discuss 'Battle Hymn of a Tiger Mother' (one of the most talked about and controversial books of 2011). Meg Akabas (founder of Parenting Solutions) provided insights, commentary, and parenting strategies in addition to facilitating an active discussion on parenting styles and Amy Chua's book.

New Year, New Start! Make 2011 a Great Year! (Jan 2011)

On January 6th, FWA's Working Mother's Committee returned to BNY Mellon for a sell-out event. FWA members and guests came to network, lunch, and learn and to 'Make 2011 a Great Year'. Lorraine Heber-Brause (Principal at Foxglove) and Dr. Lewis Schlosser (a psychologist, researcher, and Associate Professor at Seton Hall University) teamed to lead the group in developing New Year's resolutions and creating strategies to achieve our goals.

Strategies for Succeeding in a Changing Environment! (October 2010)

In October, Bank of Tokyo-Mitsubishi hosted The Working Mother's Committee, FWA members, guests, and Speaker Ro Pavlick (Certified Leadership Coach, President Bluestone Advisors, LLC., and Senior Consultant at DBM) for a sell-out event. Everyone had a great time networking, lunching, and learning strategies that will make us even more successful in both our professional and personal lives in this ever-changing world.

Attendees at these events continue to stay in touch as friends, colleagues, and resources (both professionally and personally) for one another.

Recommendations for the Future

Continue to provide learning and networking opportunities for working mothers to expand their professional and personal knowledge and resources. Offer programs that provide strategies to simplify their lives, leaving more time to enjoy with their families, decrease their stress, and enhance their professional careers.

Expand and engage the committee – get them more involved with planning and developing programs. Work with the FWA Board to streamline the event planning and approval in order to increase efficiency.

Special Thanks

Special thanks to:

- Co- chairs: Jane Giaquinto and Maureen Nobile;
- Pillar Leader: Barbara Cohen;
- The FWA staff: Lisa Buddenhagen, Anja DeRosa, and Nancy Sellar; and
- Our speakers: Meg Akabas, Ro Pavlick, Lorraine Heber-Brause, and Dr. Lewis Schlosser.

Also, special thanks to BNY Mellon and Bank of Tokyo-Mitsubishi UFJ for generously providing accommodations for events.

Participating Committee Members

Jane Giaquinto
Maureen Nobile

**FWA of New York, Inc.
Approved Members 2010-2011**

August 2010	
Borra	Kiran
Boschini	Francesca
Bryon-Brown	Alison D.
Clemente	Gina
Dorvil	Christine Abigail
Everett	Martha
Ferguson	Diane
Gordon	Tracey
Haboucha	Joyce
Hennessey	Anne
Isola	Eileen
Martin Adams	Gina
Meteoglu	Ebru
Miller	Madelyn
Nazarova	Vera
O'Neill	Errin M.
Pinto	Silfath
Samlal	Lillian N.
Sanfilippo	Augusta
Sawhney	Sareena Malik
Williams	Jennifer
Zlatar	Snezana

September 2010	
Allman	Joan
Astahova	Ludmila
Carter	Nicole
Cirillo	Christine
DeLeon	Ana
Devitto	Tarin
Goh	Olive
Khalil	Amanda
Knies	Alice
Kuznetsov	Yan
McDonough	Kathleen A.
Mueller	Paula
Noonan	Mary Alma
Paradise	Margaret
Pehlam-Webb	Cindy
Quintin	Susan
Saab	Donna
Topf-Masheb	Stephanie
Tschinkel	Lauren
Vizzini	Tina
Weiss	Robin

October 2010	
Aviles	Rosinna
Bailey	Yvonne
Coffman	Denna
Dragone	Tom
Escobar	Anne
Freeman	Gigi
Gil	Nadia
Guerin	Susan
Heber-Brause	Lorraine
Honig	Steven
Koh	Yumi
Pestana	Susy P.
Petkun	Emily
Scheyder	Kristen
Scucci	Mary Kay
Snook	Pam
Wilner	Marjorie

November 2010	
Blank	Jennifer M.
Bodner	Judy
Descano	Linda
Goldzung	Laura
Kiely	Lauren E.
Koch	Becky
Kuehn	Laura
Lambert	Patty
Levitsky	Stephanie
Lineberger	Kathryn
Maloney	Kathleen
O'Meara	Margaret
O'Rouke	Theresa
Stamboulie	Sarah
Vagnone	Tara D.

December 2010	
Alegria	Karen
Bierce	Cameron
Billick	Angela
Black-Tyler	Macie
Cao	Lan
Cetrulo	Christine
Coretto	Tony
Davis Nunoz	Laura
Desideri	Donna
Ebin	Lois
Feldman	Lori

**FWA of New York, Inc.
Approved Members 2010-2011**

December 2010 (continued)	
French	Jennifer
Gilmour	Niki
Halpern	Rhonda
Harnisch	Virginia J.
Itskovskiy	Olga
Kathuria	Manisha
Kennard	Suzanne
Pelligrino	Raquel
Taylor	Tracey
Venditti	Andrea
Windrem	Robert

January 2011	
Ahn	Bridgette Y.
Bodner	Karen
Desman	Rebecca
Hornick	Edith
Markowitz	Ayturk
Werk	Eva

February 2011	
Chamberlain	Mark
Garcia	Cesar
Gerth	Jessica D.
Hyman	Miriam
Jaikaran	Simone
Kamminga	Alisha
Kantor	Lenore
Killip	Wyeth
Kozak Lindsay	Tara
LaSpina	Donna
Molloy	Christelle
Santoli	Patricia
Usbay	Remy
Weiss	Kristie Jo

March 2011	
Anyanwu	Emmanuella
Cuocolo	Kathleen
Franchetti	Suzanne
List	Karen
Pressman	Holly
Shea	James
Solla-Diaz	Eileen
Thomas	Marsha

April 2011	
Amplea	Lorraine
Eddy	Rebecca
Ferrell	Lissa Jean
Fillet	Vicky
Fiorillo	Lorayne
Frankel	Lee
King	Jane
Lakatos	Susan
Menon	Shirin
Nacey	Caroline
Pino	Kim
Reyes	Diane
Schalkwyk	Grace
Siefert	Lisa

May 2011	
Berkoff	Leslie
Carnicelli	Sheila
Cohen	Stephen
Converse	Christine
Fisher	Helene
Gerasimova	Elena
Greenwald	Joel
Kipness	Mindy
Mishkin	Stephanie
Nochlin	Pamela
Pepper	Carol
Raitzin	Angela
Rosenbaum	Mary
Rosengard	Lise
Shugart	Gretchen
Weiss	Sheryn

June 2011	
Ancowitz	Nancy
Britell	Samantha
Ceniza-Levine	Caroline
Chen	Lisa
DiPuma	Michelle
Dorner	Irene
Egan	Elaine
Harris	Sandra
Harrison	Ariel
Hewlett	Slyvia Ann
Makinen	Marita
Mott Newirth	Marianna
Richardson	Della

FWA of New York, Inc.
Approved Members 2010-2011

June 2011 (Continued)	
Somar	Leeta
Tsang	Dianna

Wankmueller	Donna
Wysocki	Jan

***FWAA New/Reinstated Members'
Contact Information***

as of

Tuesday, June 14, 2011

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Angela Billick

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