



UWaterloo Women in Finance

A Day in Capital Markets Virtual Conference

Delegate Package

February 19th, 2021



UNIVERSITY OF
WATERLOO

SCHOOL OF ACCOUNTING
AND FINANCE



**WOMEN
IN FINANCE**

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Itinerary

OVERVIEW

WIF's **A Day in Capital Markets** Virtual Conference will be held on **Friday February 19th** via the WebEx platform. With 4 participating firms, 19 featured industry professionals, and 60 delegates, this event provides students with an opportunity to network and learn more about finance.

9:15am –
10:00am

Keynote – Lindsey Walton

10:15am –
11:00am

A Day in Investment Banking with TD Securities

11:15am –
12:00pm

A Day in Sales & Trading with RBC Capital Markets

12:00pm –
1:00pm

Lunch

1:00pm –
2:00pm

Industry Panel

2:15pm –
3:00pm

A Day in Hedge Funds with Polar Asset Management Partners

3:15pm –
4:00pm

A Day in Private Equity with Ontario Teachers' Pension Plan

Conference Sessions

Keynote – Lindsey Walton



WOMEN IN FINANCE

A DAY IN CAPITAL MARKETS

Virtual Conference

KEYNOTE SPEAKER

Friday Feb 19th, 2021
9:15 am - 10:00 am EST

Lindsey Walton
CFA, PRM

A highly experienced finance professional and equity advocate

Head Of Canada at
Principles for Responsible Investment

Previous Positions:

- Director of National Programming and Engagement at **WCM**
- Market Risk Trading Floor Specialist at **CIBC Capital Markets**



Keynote speaker Lindsey Walton will be sharing details about her journey into finance, the challenges she faced, her efforts to advocate for equity, and her work in the responsible investing space. This session will consist of a 20-minute self-led intro by Lindsey and 10-minute WIF moderated Q&A, followed by a 15-minute open Q&A.

Industry Panel



WOMEN IN FINANCE

A DAY IN CAPITAL MARKETS

Virtual Conference

INDUSTRY PANEL

Friday Feb 19th, 2021
1:00 pm - 2:00 pm EST



Margaret Wu
Lead Investor
Georgian



Kaylee Arnold
Director
Derivative Product Groups
Scotiabank Global Banking and Markets



Lindsay Scott
Director
Investment Banking
TD Securities



Aly Hadibhai
Managing Director
ONCAP Management Partners

A diverse group of highly qualified finance professionals with a variety of experiences

Industry panelists Kaylee Arnold, Margaret Wu, Aly Hadibhai, and Lindsay Scott will be featured in this 1-hour session. These panelists have experience in various areas of finance including growth equity, sales and trading, private equity, and investment banking. They will be sharing their insights on current industry trends.

Conference Sessions

A Day in Investment Banking with TD Securities

WOMEN IN FINANCE

A DAY IN INVESTMENT BANKING
Virtual Conference

TD SECURITIES

Friday Feb 19th, 2021
10:15 am - 11:00 am EST

Rebecca Yao
Investment Banking Associate

Angie Han
Investment Banking Analyst

Anran Liu
Investment Banking Analyst

Alex Vegh
Investment Banking Analyst

A leading corporate and investment bank known for their innovation, execution and experience as global market makers

TD

This session will feature 4 SAF alumni who are investment banking professionals including Rebecca Yao, Angie Han, Anran Liu, and Alex Vegh. They will be providing insights on TD's culture, tips on how to break into investment banking, and details about their daily tasks and responsibilities.

A Day in Sales & Trading with RBC Capital Markets

WOMEN IN FINANCE

A DAY IN SALES AND TRADING
Virtual Conference

RBC CAPITAL MARKETS

Friday Feb 19th, 2021
11:15 am - 12:00 pm EST

Fiona Hu
Vice President
Global Electronic Execution

Meng Ye
Quantitative Trader
Global Equities

Kelsey Cook
Associate
Commodities

Diana Di Luca
Vice President
Institutional Equity Trading

A leading provider of financial services as the fifth largest bank in North America and 10th largest bank in the world by market capitalization

RBC Capital Markets

Fiona Hu, Meng Ye, Kelsey Cook, and Diana Di Luca will be featured in this session. These 4 sales and trading professionals will provide insights on their daily duties and roles, details about the culture within RBC Capital Markets, and tips on how to break into sales and trading.

Conference Sessions

A Day in Hedge Funds with Polar Asset Management Partners

WOMEN IN FINANCE

A DAY IN HEDGE FUNDS
Virtual Conference

POLAR ASSET MANAGEMENT PARTNERS

Friday Feb 19th, 2021
2:15 pm - 3:00 pm EST

Caryn Maxwell-Smith
Director of Business Development & Investor Relations

Victoria Bons
Senior Credit & Macro Analyst

Raj Chanda
Associate
Convertible & Risk Arbitrage

The oldest hedge fund firm in Canada that has been providing unique investment strategies since 1991 and currently manages over \$6 billion USD

POLAR

Caryn Maxwell-Smith, Victoria Bons, and Raj Chanda will be featured in this session. These 3 hedge fund professionals will provide insights on their daily responsibilities and tasks, details about the culture within Polar, and tips on how to stand out when applying to roles in asset management.

A Day in Private Equity with Ontario Teachers' Pension Plan

WOMEN IN FINANCE

A DAY IN PRIVATE EQUITY
Virtual Conference

ONTARIO TEACHERS' PENSION PLAN

Friday Feb 19th, 2021
3:15 pm - 4:00 pm EST

Alice Xu
Investment Associate,
Infrastructure & Natural Resources

Jennie Lin
Former
Investment Analyst
(Co-op), Private Capital

Maribel Millones
Investment Associate,
Infrastructure & Natural Resources

Canada's largest single-profession pension plan with over \$200B assets under management on behalf of 329,000 retired and working teachers

ONTARIO TEACHERS' PENSION PLAN

This session will feature 2 private equity professionals including Alice Xu and Maribel Millones, and former private equity co-op and current SAF student Jennie Lin. They will be providing insights on OTPP's culture, tips on how to break into private equity, and details about their daily duties and roles.

Guidelines & Structure

General Guidelines

1. Dress code: business casual
2. Towards the end of each session, please be prepared to turn on your video for a quick picture.
3. Join each session 2-3 minutes early as we will begin promptly at the start time.
4. Please adhere to professional conduct and be respectful at all times.
5. At the end of each session, you may thank the speakers for joining us via the chat function.

Keynote & Industry Panel

The keynote will begin with a 20-minute self-led introduction, followed by a 10-minute WIF moderated Q&A, and conclude with a 15-minute open Q&A. The industry panel consists of a 45-minute WIF moderated Q&A and 15-minute open Q&A.

1. When entering the events, please mute your audio and turn off your video.
2. During the open Q&A period, you may use the raise hand function and unmute yourself to ask your question or use the chat function.
3. Feel free to ask the speakers for more examples or to expand on any topics they have covered.

Individual Firm Sessions

Each session will begin with a 10-minute firm led introduction, followed by a 20-minute WIF moderated panel, and conclude with a 15-minute open Q&A.

1. It is expected that your camera remains turned on for the entirety of each session.
2. You may use the chat function or unmute your mic during the open Q&A period, but otherwise, please keep your mic on mute.

Special Thanks

Thank You, Delegates

UW WIF would like to thank you—the delegates—for your active participation and enthusiastic attitude towards our conference. Your presence motivates us to keep creating opportunities like this one.

The WIF Executive Team wishes everyone the best of luck this term. We look forward to seeing you again at our future events!

Corporate Partners



**ONTARIO
TEACHERS'**
PENSION PLAN

Thank You, Partners

We would like to thank everyone who has volunteered their time and efforts in contributing to this virtual conference. This event would not have been possible without your support.

Internal Advisors



Helena Wang
Advisory Board



Jeannine LiChong
Advisory Board



Meng Wang
Advisory Board



Garvin Blair
Faculty Advisor



Ranjini Jha
Faculty Advisor



Kevin McMahon
Staff Advisor

Thank You, Advisors

Lastly, we would like to thank our internal advisors for their ongoing support and guidance. We truly appreciate everything you do for us.



Irene Wu
MAcc



Patricia Guo
AFM Grad



Patty Mah
Staff Advisor

2021 WIF Executive Team

Co-Chairs



Nicole Liu
AFM 4A



Puneet Kaur
AFM 2A

Marketing



Jane Li
AFM 2A



Maryam Tahir
AFM 3A

Communications



Ramneek Singh
AFM 1B



Sandra Huang
AFM 1B

Branding



Caddie Zhao
AFM 2A

Logistics



Queena Lai
AFM 3A



Anchita Suri
AFM 3A

Outreach



Megan Boyd
AFM 3A



Aliana Versi
AFM 4A

About Us

UWaterloo Women in Finance (WIF) is a School of Accounting and Finance (SAF) initiative established with the mission to inspire, educate, and encourage more women to capitalize on opportunities in the finance industry.

Vision:

To be the bridge that brings well-educated female talent to firms who value diversity.



Contact

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www.instagram.com/uwaterloowif

www.facebook.com/WIFUWaterloo

www.linkedin.com/company/uwaterloowomeninfinance