



UWaterloo Women in Finance

Pathways in Finance Virtual Conference

Delegate Package

February 25th, 2022



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Itinerary

Overview

WIF's **Pathways in Finance** Virtual Conference will be held on **Friday, February 25th** via Zoom. With 4 participating firms, 20 featured industry professionals, and 80 delegates, this event provides students with an opportunity to network and learn more about various careers in finance.

9:00am – 10:00am

Keynote with Barbara Stewart

10:15am – 11:15am

Pathways in Valuations with Ontario Teachers' Pension Plan

11:30am – 12:30pm

Pathways in Asset Management with RBC Asset Management

12:30pm – 1:30pm

Lunch

1:30pm – 2:30pm

Sustainable Finance Panel

2:45pm – 3:45pm

Pathways in Venture Capital with Disruption Ventures

4:00pm – 5:00pm

Pathways in Investment Banking with TD Securities

Conference Sessions

Keynote with Barbara Stewart

Keynote speaker Barbara Stewart will be sharing details about her journey into finance, the challenges she faced, her efforts to advocate for equity, and her research on women and finance. This 1-hour session will consist of a 45-minute presentation delivered by Barbara, followed by a 15-minute open Q&A.

WOMEN IN FINANCE PATHWAYS IN FINANCE
KEYNOTE SPEAKER Virtual Conference
Friday, February 25th
9:00 am - 10:00 am EST

Barbara Stewart, CFA

Researcher and Author of the Rich Thinking® series; Keynote Speaker; Women and Finance Expert

- Advisory Board Member for Kensington Capital Partners
- 20+ years in portfolio management and investment counselling
- Columnist for Enterprising Investor, Canadian MoneySaver, and Golden Girl Finance

Sustainable Finance Panel

Industry panelists Mareen Georgie, Veronica Chau, Mary Chan, and Upkar Arora will be featured in this 1-hour session. These panelists have experience in various areas of ESG, sustainable finance, and impact investing. They will be sharing their insights on industry trends and their advice for students interested in this field.

WOMEN IN FINANCE PATHWAYS IN FINANCE
SUSTAINABLE FINANCE PANEL Virtual Conference
Friday, February 25th
1:30 pm - 2:30 pm EST

Mareen Georgie
Vice President,
ESG Investment Banking

Veronica Chau
Partner and Director,
Sustainable Investing and
Social Impact

Mary Chan
Director,
Sustainable Finance

Upkar Arora
Chief Executive
Officer

J.P.Morgan ECG CIBC rally assets

A group of highly qualified professionals with a variety of experiences in ESG, sustainable finance, and impact investing

Conference Sessions

Pathways in Valuations with Ontario Teachers' Pension Plan

This session will feature 3 valuations professionals including Lily Zhang, Wendy Lo, and Katerina Kiprich. They will be providing insights on OTPP's culture, tips on how to break into valuations, and details about their roles and daily duties.

WOMEN IN FINANCE

PATHWAYS IN VALUATIONS
Virtual Conference

ONTARIO TEACHERS' PENSION PLAN

Friday, February 25th
10:15 am - 11:15 am EST

Lily Zhang
Quantitative Analyst,
Valuation, Risk Analytics &
Model Validation

Wendy Lo
Senior Financial Analyst,
Valuation, Risk Analytics &
Model Validation

Katerina Kiprich
Senior Financial Analyst,
Valuation, Risk Analytics &
Model Validation

*Canada's largest single-profession pension plan
with over \$227B assets under management on
behalf of retired and working teachers*

ONTARIO TEACHERS' PENSION PLAN

Pathways in Asset Management with RBC Asset Management

Krystyne Manzer, Lauren Horsfall, and Sarah Riopelle will be featured in this session. These 3 professionals will provide insights on their daily tasks and roles, details about the culture and structure within RBC Asset Management, and tips on how to break into asset management.

WOMEN IN FINANCE

PATHWAYS IN ASSET MANAGEMENT
Virtual Conference

RBC GLOBAL ASSET MANAGEMENT

Friday, February 25th
11:30 am - 12:30 pm EST

Krystyne Manzer
Vice President,
Portfolio Specialist

Lauren Horsfall
Head,
Global Asset Management
Project Management Office
(North America)

Sarah Riopelle
Vice President &
Senior Portfolio Manager,
Investment Solutions

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

RBC Global Asset Management

Conference Sessions

Pathways in Venture Capital with Disruption Ventures

This 1-hour session will feature 2 venture capital professionals including Elaine Kunda and Connelly Hogarth. They will be providing insights on the culture and investment strategy at Disruption Ventures, tips on how to break into venture capital, and details about their roles and daily duties.

WOMEN IN FINANCE

PATHWAYS IN VENTURE CAPITAL

DISRUPTION VENTURES Virtual Conference

Friday, February 25th
2:45 pm - 3:45 pm EST

 Elaine Kunda
Managing Partner

 Connelly Hogarth
Data Analyst

A female founded venture capital firm that invests in high growth, female founded companies in North America that are at the Seed or Series A stage



Pathways in Investment Banking with TD Securities

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

WOMEN IN FINANCE

PATHWAYS IN INVESTMENT BANKING

TD SECURITIES Virtual Conference

Friday, February 25th
4:00 pm - 5:00 pm EST

 Rebecca Yao
Vice President,
Investment Banking

 Angie Han
Investment Banking
Associate

 Anran Liu
Investment Banking
Analyst

 Alex Vegh
Investment Banking
Associate

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



Guidelines & Structure

General Guidelines

1. Dress code: business casual
2. At the end of each session, please be prepared to take a group 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 & Sustainable Finance Panel

The keynote will begin with a 45-minute self-led introduction, followed by 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 these 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 consist of a 10-minute firm-led introduction, 15-minute WIF moderated panel, 30-minute networking session, and 5-minute conclusion.

1. Keep your camera turned on for the entirety of each session. At the end of each session, please be prepared to take a group picture.
2. Please keep your mic on mute during the 15-minute panel.
3. For the networking session, you will be placed into a breakout room with an industry professional and can switch rooms after the first 10 minutes if you would like to speak with another firm representative.

Networking Tips

General Tips

1. **Do your homework:** Preparing in advance will help you ask more smart and relevant questions, and learn more in-depth information about the person, the work environment, and the organization.
2. **Ask for advice, not a job:** Networking is a give-and-take process that involves making connections, sharing information, and asking questions. It's a way of relating to others, not a technique for getting a job.
3. **Be confident:** Confidence is key and helps you stand out! Be sure to introduce yourself when asking a question, look directly into the camera when speaking, and communicate clearly and effectively.
4. **Have fun:** Participating firms and volunteers understand that you are a student and are trying to learn more, so don't be nervous! Remember to smile and have a good time.

Sample Questions to Ask

Below is a list of sample questions you can consider asking industry professionals when you are networking in breakout rooms. Remember that these are just suggestions—you may ask about topics beyond this list as well.

1. What do you think are the most important skills for success in this field?
2. What do you like/dislike the most about your work?
3. What kinds of projects are you working on right now?
4. How did your career path change over time?
5. What advice would you give to someone starting in your role?
6. What are the biggest challenges your organization is currently facing?
7. What do you see as the major issues/trends in your field today?
8. How did your career path change over time?
9. Based on your career journey so far, what do you wish someone would have told you earlier on in your career?

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



Global Asset Management

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.

Thank You, Advisors

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

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



Patty Mah
Staff Advisor

2022 Executive Team

Co-Heads



Puneet Kaur
AFM 3A



Queena Lai
AFM 4A

Outreach



Megan Boyd
AFM 4A



Alice Qin
Math/CPA 4A

Logistics



Elsa Sajwani
AFM 1B



Maryam Tahir
AFM 4A

Marketing



Chantel Trinh
Economics 2A

Branding



Momna Shafique
AFM 1B



Caddie Zhao
AFM 3A

Communications



Claire Becker
SFM 1B



Ramneek Singh
AFM 2A



Sandra Huang
Math/CPA 2A

Thank you for attending WIF's
Pathways in Finance Conference 2022!



Contact Us

Email: info@uwaterloowif.ca

Facebook: www.facebook.com/WIFUWaterloo/

Instagram: www.instagram.com/uwaterloowif/

LinkedIn: www.linkedin.com/uwaterloowomeninfinance/