



AGENDA

- 2:00PM - 2:35PM American Awakening: Diversity & Inclusion in the Workplace and Beyond**
Featured Speaker: Robert Marchman – Senior Policy Advisor for Diversity & Inclusion, U.S. Securities and Exchange Commission (SEC)
Moderator: Dale Brown, CAE – President & CEO, Financial Services Institute (FSI)
- 2:35PM - 3:15PM Breakout Conversations & Debrief**
Facilitators: Angela Clark – Diversity & Inclusion Leader, Fidelity Investments
Anand Sekhar – VP, Practice Management & Consulting, Fidelity Institutional
- 3:15PM - 3:50PM Fireside Chat: Implementing D&I Within Your Organizations**
Panelists: Irissol Arce – Senior Director Diversity & Inclusion, Northwestern Mutual
Angela Clark – Diversity & Inclusion Leader, Fidelity Investments
Moderator: Karen Benenati – Executive Director Human Resources, Cadaret, Grant & Co., Inc.
- 3:50PM - 4:00PM Next Steps and Takeaways**
Facilitator: Dale Brown, CAE – President & CEO, Financial Services Institute (FSI)
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BREAKOUT DISCUSSION TOPICS

1. What D&I initiatives does your company currently offer?
2. Where do you see your company, or the industry as a whole, is lacking in D&I support?
3. What other opportunities can FSI offer to our members to collaborate to stay up to date on what other firms are doing in the D&I space?