



Presents

CONCLAVE

A Business, Professional and Personal Advancement Collaborative

May 16-18, 2024

Crystal Springs Resort, Hamburg, NJ

THURSDAY, MAY 16

12:00 – 1:30pm
Copper Room

A.L.I.G.N. (Aim, Launch, Invest, Gain, Nurture)

Our opening session isn't just a warm-up—it's the spark that ignites the entire event! Join us as we unveil our goals and agenda, ensuring everyone is aligned for maximum impact right from the start. And brace yourself for our special guest speaker, a beacon of inspiration who will uplift and empower with insights on nurturing both the inner and outer woman.

Master of Ceremonies: Cathleen Trigg-Jones, Founder & CEO, iWoman TV

Overview: Renae Griffin, Managing Director, GCM Grosvenor; Co-Founder, WOCII

Remarks: Carmen Ortiz-McGee, COO, National Association of Investment Companies, WIA Initiative

1:30 – 3:00pm
Copper Room

Professional Advancement

Visualization - Big, Bold, and Beyond

Expand your horizons and break through limitations with a visualization exercise, and exploration of new ideas and opportunities, both personally and professionally. Get ready to dream big, think boldly, and discover new horizons in a session that is anything but ordinary!

Introduction: Johnita Mizelle, Managing Partner, ONYX Capital Advisors

Facilitator: Shirley G. McAlpine, Founder & CEO, Shirley McAlpine & Associates

2:30 – 3:00pm
Copper Room

Personal Advancement

Caring for Self, First

Facilitator: Shirley G. McAlpine, Founder & CEO, Shirley McAlpine & Associates

3:00 – 3:30pm

Self-Care Moment

3:30 – 4:30pm
Copper Room

Business Advancement

The WOCII Ecosystem - Doing Business Together – Strategic Partnering

Dive into the WOCII Ecosystem as we share deals and partnerships we've forged and learn how we leverage our powerful network for even greater success. Get ready for a group conversation that will have you eager to collaborate like never before!

Facilitator: Tosh Ernest, Head of Catalyst 2045, SVB, A Division of First Citizens Bank

Speakers:

Angela Outlaw-Matheny, Director of Diverse Manager Equity, Crewcial Partners LLC

Angela Miller-May, Chief Investment Officer, Illinois Municipal Retirement Fund

4:30 – 6:00pm	Self-Care Moment
6:00 – 9:00pm Dinner Diamond Ballroom	Iron Chef Team Challenge Unleash your inner culinary genius in our Iron Chef Competition! This team exercise is all about working together, creativity, and, most importantly, fun. Join forces with your fellow WOCIIIs as you team up to prepare a competitive meal. May the best chefs win!
9:00 – 10:00pm Quartz Room	Personal Advancement The Wind Down Indulge in well-deserved relaxation. Savor tea or a nightcap as you mingle with newfound friends or simply bask in the serene ambiance. Whether you choose to engage in conversation or simply enjoy a moment of quiet contemplation, The Wind Down offers a peaceful conclusion to an enriching day.

FRIDAY MAY, 17

7:00 – 7:45am Fitness Studio One	Morning Movement Start the day energized with our Morning Movement session, offering yoga or a meditative walk to awaken body, mind, and spirit. Set intentions, cultivate self-love, and embrace well-being as you choose the practice that resonates with you. Yoga: Renae Griffin, RG Yoga International – Yoga that leaves you feeling really great!
8:30 – 9:30am Breakfast Buffet Quartz Room	A.L.I.G.N Revisited Day one Reflection and Reactivation Master of Ceremonies: Cathleen Trigg-Jones Fireside Chat: Lola C. West, Chairwoman, Chief Culture Officer, Co-Founder, Westfuller, Advisors, LLC
9:30 – 10:30 am Quartz Room	Professional Advancement State of the Industry for Women - Navigating the Complexities in the Current Climate In the ever-evolving landscape of investment management, senior women of color encounter unique hurdles that demand attention and action. We will delve into the intricacies of these challenges, particularly in the context of persistent anti-DEI attacks and underrepresentation within the industry. By collectively confronting these challenges, we can pave the way for a more equitable and thriving investment management landscape for all. Facilitator: Carra Wallace, Founder and CEO at Optimized Diversity Solutions Speakers: <ul style="list-style-type: none"> • Machel Allen, CFA, President & CIO, Metis Global Partners • Diane T. Ashley, Founder and CEO, DTA Diversity Counts • Kim Lew, CEO, Columbia Investment Management Company
10:30 – 11:00 am	Self-Care Moment
11:00 – 12:00 pm Quartz Room	Business Advancement Supporting Women Launched Funds Unlocking the full potential of women fund managers requires a concerted effort. In this interactive discussion, we will explore innovative ways to share resources to support the growth of women-led funds. Sharing best practices and insights to providing access to capital, talent, and networks, collaboration is key to overcoming barriers and accelerating the success of women fund managers. Facilitator: Carmen Ortiz-McGee, COO, National Association of Investment Companies WIA Initiative

Speakers:

- Taffi Ayodele, Director of DEI & Emerging Manager Strategy, Office of NYC Comptroller
- Jessica Holsey, Managing Director, GCM Grosvenor
- Kerstin Dittmar, Founder & Managing Partner, L2 Point
- Sara Zulkosky, Co-Founder, Recast Capital

12:00 – 1:00 pm
Quartz Room

Personal Advancement

Converting Income to Wealth - Establishing an Investment Consortium

Discover the power of pooling resources in an investment consortium to access new opportunities, diversify portfolios, and mitigate risks. Let's journey together towards financial independence and prosperity.

Facilitator: Betina Dowdell, Client Development Director for Wealth Management USA, UBS

Speakers:

- Angelique Brunner, Founder, EB5 Capital
- Kirk A. Sykes, Co-Managing Partner, Accordia Partners, LLC.
- Pamela Robertson, Partner, Squire Patton Boggs LLP

1:00 – 2:30pm
Lunch
Copper Room

Business Advancement

SWAP – Sharing with A Purpose

Exchange ideas, insights, and opportunities that could shape your business, professional or personal future. We will break out into small groups, ensuring meaningful interactions tailored to your interests. Whether you are seeking collaborations, partnerships, or simply looking to expand your network, this session is designed to help us do more business together.

Nia White, Co-Founder & Managing Partner, Arc Advisors

2:30 – 4:00pm
Quartz Room

Personal Advancement

Investing in Self – Body, Spirit, Mind

Explore the importance of self-care in unlocking your full potential both at home and in the workplace. Learn practical strategies for tuning into your needs and nurturing yourself to be your best self, fostering balance, resilience, and vitality in every aspect of your life.

Facilitators:

Shirley G. McAlpine, Shirley McAlpine & Associates

Dr. Tegan Moore, Executive Medical Director & Co-Founder, Wheelhouse Center for Health and Wellbeing

4:00– 6:00pm

Self-Care Moment

6:00pm – 9:00pm
Reception / Dinner
Copper Room

Business Advancement

New Decision-Maker Salute - Creating Impact

Join us as we shine a dazzling spotlight on these visionary leaders who are not just driving change but setting new standards within their institutions. But there is more to it than just recognition. We are here to delve deeper, discussing how we can offer the necessary support to propel them to even greater heights. It's an evening dedicated to both celebration and empowerment.

Introducer: Debra Draughan, Head of Investor Relations, Atlantic Street Capital

Honorees:

- Taffi Ayodele, Director of DEI & Emerging Manager Strategy, Office of NYC Comptroller

- Tiffany Junkins, Executive Director, Municipal Employees’ Annuity and Benefit Fund of Chicago
- Carmen Sierra, Treasurer, City of Hartford

9:00pm

The Wind Up - The night is still young....

SATURDAY, MAY 18

8:00 – 9:00 am

Morning Movement

Wrap up the Conclave with our Morning Movement session, offering yoga or a meditative walk to awaken body, mind, and spirit. Set intentions, cultivate self-love, and embrace well-being as you choose the practice that resonates with you.

Meditative Walk: Johnita Mizelle, Managing Partner, ONYX Capital Advisors

10:00 – 1:00 pm

Brunch

Copper Rom

Business Advancement

Activating Your/Our Vision

As we bid farewell to an exhilarating day and a half packed with insights, connections, and opportunities, join us for the ultimate wrap-up session where we'll recap all the highlights and pivotal moments, and chart the next steps towards collective success.

Master of Ceremonies: Cathleen Trigg-Jones, Founder & CEO, iWomen TV

Facilitator: Shirley G. McAlpine, Founder & CEO, Shirley McAlpine & Associates

1:00pm

CONCLAVE Concludes