

Greetings to the Women in Securities Finance Community! The Chicago Chapter is pleased to bring our members the Q2 2023 newsletter. Please read on to learn more about WISF's accomplishments, upcoming events, and so much more.

Have a happy and healthy summer with your family and friends!

### Upcoming Industry Events

#### September 12

IMN's European Beneficial Owners' Securities Finance & Collateral Management Conference

London, UK

[More info](#)

#### October 9-12

38th Annual RMA Securities Finance & Collateral Management Conference

Amelia Island, FL

[More info](#)

#### November 2

Rates & Repo North America  
New York, New York

[More info](#)

### Q2 Podcast Updates



**An Exchange View:  
Infrastructure Updates from Canada**



**The Securities Industry Institute (SII):  
SIFMA's premier executive development  
program offered at Wharton**



**Buyside insight on  
centralized trading and DEI priorities**



**37 Angels  
Empowering Women  
through Angel Investing**

*Perspectives focuses on topics related to professional development, career strategy and industry education. As always, we welcome feedback from members on topics you would like to hear about or speakers that you would like to suggest – yourself included! Please subscribe wherever you get your podcasts. Please reach out to any Chapter Lead or Tri-Chair with suggestions.*

To listen to all episodes, please visit: [Podcast — Women in Securities Finance](#)

*ISF Directory of Securities Lending & Repo 2023 is now available online.*

## Recap of Q2 Industry Events

### RMA Securities Finance Operations and Technology Conference

On April 26, Nancy Allen, head of our New York chapter, lead a panel of 4 women to discuss how Operations is driving the P&L and has many opportunities for exciting careers. Joslyn Peters, State Street noted “the complexity of the product (securities finance) makes this interesting. It’s not monotonous.” Other panelists included Brianna Donaldson, Brown Brothers Harriman; Gabi Mantle, EquiLend and Nancy Steiker, FIS.



### RMA Securities Finance Leadership Roundtable

Leaders from Agent Lenders, CCPs and Vendors gathered for two days to discuss the current state of the securities finance industry. Upcoming 2024 changes in the US and Canada to the T+1 settlement cycle, Basel III “Endgame” that could provide a more efficient RWA profile and the looming US Debt ceiling (which luckily resolved before the June 1 X-date) were hot topics.

### Securities Finance Times Symposium

This was the first event held in Boston for what has been a London-based conference, with upwards of 150 attendees representing all parts of the Securities Finance ecosystem. Broadly, panels focused on the ever-growing demand for data quality and transparency, whether that be in support of growing regulatory reporting obligations, reducing operational friction, or optimizing asset/collateral performance. Lowering the barriers to entry will bring more FinTechs as solution providers for both the lender and borrower communities.



### 6th Annual Finadium Investors in Securities Lending Conference

Marney McCabe, Head of Relationship Management for Fidelity Agency Lending, had an inspiring conversation with Heather Burns, Senior Vice President at Jefferies in Securities Finance Sales, about Heather’s unique professional journey and how each chapter of her story has shaped who she is today. Before joining the Wall Street ranks, Heather served as a Captain in the U.S. Army in the 101st Airborne Division as a UH-60 Blackhawk helicopter pilot. In addition to her already impressive accomplishments, Heather also currently serves on the board of Community Impact at Columbia University, leads the Community Outreach Working Council for JVETS, is on the Steering Committee for JNOBLE, and is an avid triathlete and marathoner.

## Recap of Q2 Industry Events (continued)

### CASLA Conference

WISF held a session at CASLA, Lessons from the Judy Project: Navigating Unconscious Bias, where experts explored the topic of unconscious bias with research data and how to address it in practice. Judy Project, offered by Rotman School of Management at the University of Toronto, is a highly acclaimed forum enabling women to embrace their own ambition and cultivate organizational leadership to meet evolving priorities.



### ISLA 30th Annual Securities Finance and Collateral Management Conference

We agree with Andrew Dyson's whose opening remarks at the conference reflected that "the world was a different place" thirty years ago. Technology certainly has evolved; liquidity and collateral were barely mentioned, and sustainability wasn't even considered. Also noted, this conference had 20 female speakers and was chaired by Ina Budh-Raja, EMEA Head of Securities Finance Regulatory Strategy & Industry Affairs and Markets ESG at BNY Mellon.

## Q2 WISF Events

### Chicago Chapter Event

The Chicago Chapter kicked off 2nd Quarter to connect with the University of Wisconsin Women in Business club to discuss Diversity, Equity and Inclusion and career journeys. Maheen Hasan, Freshman at University of Wisconsin hosted the event with three panelists who've embarked on their securities finance journey in different ways. We discussed how diversity, equity and inclusion has changed over the last generation, our excitement in building out WISF and our hopes for the next generation of women to come. Speakers included Lori Paris and Harleen Singh from Northern Trust and Bri Rodgers from Apex Fintech Solutions. Thank you all who were able to join us and make the event a success!

### Grow Your Network – Boston & London Chapters

In early April, the Boston Chapter launched their first round, and the London Chapter launched their second round of Grow Your Network connections. During Q1, members signed up to be connected to other participants across the securities finance community in Boston and London. If you missed signing up for this round, you will have further opportunities to participate this year!



## Q2 WISF Events (continued)



### New York Chapter: Spring Golf Clinic & Networking Event

On May 4th, the New York Chapter, hosted by RBC Capital Markets, hosted a Spring Golf Clinic and Networking Event at the LoMa Grill in the Nexus Club. This event was extremely popular with over 100 participants. Attendees had the opportunity to work with golf pro Becky McDaid, a former member of the LPGA tour and the 2002 U.S. Women's Amateur champion. Besides learning or improving how you swing a club, other topics were addressed to keep you out of the penalty box including what to expect before, during and after when attending an outing, charity or private club golf event. Golf terms, playing format, dress code and etiquette were also reviewed. This event was definitely an "Ace"!

### Toronto Chapter Community Outreach Event

For a second year in a row, the Toronto Chapter of Women in Securities Finance Group partnered with BMO Equity Finance to raise funds for Yellow Brick House. Yellow Brick House is one of the largest providers in Ontario for women and children escaping domestic violence and abuse, providing life-saving services, support, and prevention programs. Volunteers and their families gathered to do yard work, lawn care, built and planted gardens for one of the Yellow Brick House shelters.



### NY Chapter Outreach Event

On June 6th, the New York Chapter of Women in Securities Finance volunteered at God's Love We Deliver, a non-profit that cooks and home-delivers nutritious, medically tailored meals for people too sick to shop or cook for themselves.

### Chicago Chapter Social Hour Gathering

On June 20th, Northern Trust and OCC hosted a summer social on sunny day in Chicago and 35+ people enjoyed making new connections. If you're interested in getting involved in the Chicago Chapter, please give a shout to [Lori Paris!](#)





## Celebrating other Women's Groups

There are other amazing women's groups to get involved with, including the Women in Leadership Global ran by Georgie Dickens. This leadership group was founded in 2019 as a way to create the network she wished she had earlier in her career: a professional sisterhood and circle of trust that provides support, validation, empowerment and a group of powerful allies. When motivated women get together, they can do amazing things including open the NASDAQ and write a book "Women in Leadership: 500 lessons to our younger selves" which includes a story from our tri-chair founder Arianne Collette!

## Promazo 100K Mentor Challenge

Elaina Benfield made a connection with Brent Hummel which turned into a future podcast (stay tuned!) and an inspiring mentor/mentee relationship to help 100,000 underrepresented students secure their first job by building informal networks to help incredibly bright, motivated students to secure their first internships or jobs. Chicago leadership has joined up and connected with students at DePaul University and UC Santa Barbara.

**"My mission in life is not merely to survive, but to thrive; and to do so with some passion, some compassion, some humor, and some style." - Maya Angelou**

**We are thrilled to be shortlisted a second year in a row for the Securities Finance Times Industry Excellence Award for Diversity & Inclusion Initiative!**

Last year, we were awarded the Diversity and Inclusion Initiative of the Year award for demonstrating commitment to equality and inclusion on a sustainable basis. We are honored to be recognized in this category again and are proud to support the other nominees in the group at J.P. Morgan and EquiLend. Stay tuned!



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