

# 2016 | Merit Award Dinner



WOMEN'S BOND CLUB

LEAD. LEARN. RETURN.



## MERIT AWARD DINNER POST EVENT RECAP

The Women's Bond Club 23rd Annual Merit Award Dinner was held at American Museum of Natural History in New York on April 5th. The dinner was hosted by Thomson Reuters and honored Shelley O'Connor, Ana Oliveira, and 51 Rising Stars from across the financial services industry.

Jim Smith, President and Chief Executive Officer, at Thomson Reuters, opened the evening. "As a CEO, you get to decide what kind of company you want to work for. For me that was a company that champions a diverse and inclusive workplace, promoting women as equal partners in the growth and profitability of our business," said Jim Smith, the evening's keynote speaker. "We are proud to work with organizations like The Women's Bond Club to support and promote a strong pipeline of senior female representation across the industries we serve."

Ana Oliveira was honored with the 2016 Isabel Benham Award in recognition of her exceptional dedication to the advancement of women. Ana is the President and CEO of The New York Women's Foundation, the largest women's fund in the country. Focusing on economic security, safety and health, in 29 years, The Foundation has distributed over \$50 million to 371 organizations, impacting over 6 million women and girls in poverty across NYC. In her remarks, Ana expressed her deep appreciation to the Women's Bond Club for the Isabel Benham Award and talked about the common ground that The New York Women's Foundation shares with the Women's Bond Club—women's leadership, creating change collectively, and investing. She focused on The Foundation's early investment in women-led grassroots organizations in the most underinvested communities in New York City and the remarkable returns of these investments—from programs supporting education and employment opportunities to programs focused on health and safety for women and families. She also touched on The Foundation's inclusive approach to grant making, where women community leaders are looked to for solutions and where women of all means come together to fund the work of these women leaders.

The Merit Award was given to Shelley O'Connor, Co-head of Wealth Management, at Morgan Stanley, for her outstanding professional contributions in financial services. Morgan Stanley's Wealth Management business provides comprehensive financial services to individuals, families, businesses and institutions through a nationwide network of advisors. Ms. O'Connor is a member of the Morgan Stanley Operating Committee, and she plays an instrumental role in driving the diversity and inclusion agenda at the firm. Shelley's speech addressed the changes she has seen over the years as more and more women choose careers in financial services; however, she would like to see even more women enter the business. She mentioned the significant growth in investable assets controlled by women and the importance of firms looking like the clients and communities they serve. Shelley concluded by asking the women at the event to take their knowledge and expertise and pass it along to the next generation of women in financial services. She concluded, "The impact that a single individual, like each of you, can have on influencing the dialogue should never be underestimated."

At the close of the evening, 51 remarkable women were recognized with a Rising Star Award. These individuals, acknowledged by their companies for outstanding displays of leadership, will be part of a year-long elite coaching program to further prepare them for executive roles within the financial industry.

The annual honoring of leading women and female Rising Stars in the financial services industry is part of the Women's Bond Club's continuing commitment to "Lead, Learn and Return."

The event was moderated by Women's Bond Club Co-Presidents Suzanne C. O'Connell and Andrea Ianniello, WBC Merit Award Dinner Co-Chairs Alex Paladino and Frieda Lewis, WBC Board members Deirdre O'Connor and Elizabeth Fischer.