



2024 FMA Finance Leaders' Conference

Agenda

29 February – 1 March 2024
Baruch College | New York, NY

Thursday, 29 February 2024

8:15 AM

Registration (include Starbucks gift cards)

8:15 AM – 4:00 PM

Complimentary Professional Headshots

8:45 AM

Welcome

Karen Ann Craig, Eastern Michigan University
Chair, Student Chapter Committee

9:00 AM – 10:00 AM

A Masterclass on Networking & Elevator Pitch Creation

Bevon Joseph, Skillful.ly

10:15 AM – 11:15 AM

Keynote Speaker

John Tuttle, Vice Chairman at NYSE & President at NYSE Institute

11:30 AM – 12:30 PM

Non-Traditional Careers in Finance

Barry Massarsky, Partner at Citrin Cooperman
Adam Raiken, CFO at MetLife Stadium
Corey Riley, Special Agent at FBI

12:30 PM – 1:30 PM

Luncheon

1:30 PM – 2:30 PM

Investment Outlook: Starting Out

Jill Malandrino, Global Markets Reporter at NASDAQ
Sam Stovall, Chief Investment Strategist at CFRA

2:30 PM – 3:30 PM

DEI in Finance

Paul Bryant, Plante Moran
Bevon Joseph, Skillful.ly

3:30 PM – 4:15 PM

Alumni Panel

Daniel Izzillo, Morgan Stanley
Alexanderia Kallon, S&P Global
Alex Kivali, UBS

4:15 PM – 5:00 PM

Networking Reception

Friday, 1 March 2024

8:15 AM

Faculty Advisor Roundtable Discussion
Chapter President Roundtable Discussion

9:15 AM

Investment Analysis Competition Presentations

- Judge Andre de Souza, St. John's University
- Italo Lombardi, Wall Street Prep
- Judge Carla Nunes, Kroll
- Judge Jodi Ryan, IMA

10:30 AM – 11:30 AM

Evolving Role of ESG Investing

Shaheen Contractor, Senior ESG Strategist, Bloomberg Intelligence
Carla Nunes, Managing Director and Kroll Institute Fellow at Kroll
Julianne Recine, Managing Director ESG Advisory at Kroll

11:45 AM – 12:45 PM

Financial Literacy / Financial Planning / Wealth Management

Chris Fils, Raymond James
As'ad Gourani, AG Wealth Management

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