Dear all,

Welcome to the 6th Annual Women in Investing Conference, hosted by Johnson at Cornell University! This year, we are delighted to welcome 12 top MBA programs as participants and 12 major investment management firms as sponsors. The conference was founded with the dual objective of educating MBA women about career opportunities in investment management and facilitating their recruiting opportunities through mentorship and networking. Participants can look forward to mingling with peers, networking with firm representatives, showcasing their stock pitching skills, and learning from the investment professionals on the panel.

This year, we have expanded the conference to include two speed networking sessions and have allocated more time to each session. We have also kept our expanded time for each stock pitch presentation from last year so that teams and judges have more time for interaction in this exciting component of the agenda.

This event would not be possible without the generous support of our sponsors. We are truly grateful for their expertise and time!

Sincerely,
Lakshmi Bhojraj
Founder, Women in Investing Conference
Breazzano Family Executive Director, Parker Center for Investment Research

Platinum Sponsors

Executive Sponsors

WIN 2015 Student Leader Committee
Leslie Cruz, MBA ’17
Anne LeMaster Merrick, MBA ’17
Yun Hu, MBA ’17
Mandy Pan, MBA ’17

#CornellWIN15
Follow the conversation on Twitter, post your images to Instagram or Facebook, watch the Seen feed at bit.ly/CornellWin15
AGENDA

THURSDAY, NOVEMBER 19

3:15 p.m. - 5:15 p.m. - WIN Round Robin Speed Networking Session 1	FLAGSHIP BALLROOM

Table 1: Fidelity Investments; Table 2: Eaton Vance Investment Management; Table 3: MFS; Table 4: Wellington; Table 5: Putnam; Table 6: State Street

Rotations will occur every 15 minutes at the following times: 3:30 p.m.; 3:47 p.m.; 4:04 p.m.; 4:21 p.m.; 4:38 p.m.; 4:55 p.m.

5:15 p.m. - 6:30 p.m. - Networking reception	MAGNUS/AURORA ROOM

Welcoming Remarks: Dave Breuzzano, MBA ’80, President and Chief Investment Officer, DDJ Capital Management, Chairman, Johnson Advisory Council

Introductory Remarks: Jeff Parker, ’65, MEng ’66, MBA ’70, Founding Benefactor, Parker Center for Investment Research, Managing Director, Parker Family Limited Partnership

Keynote Speaker: Melissa Reilly, Chief Investment Officer, Equity, Fidelity Investments

FRIDAY, NOVEMBER 20

7:00 a.m. - 8:15 a.m. - Breakfast Keynote	PLAZA A

Keynote Speaker: Edward Perkin, Chief Equity Investment Officer, Portfolio Manager, Eaton Vance Management

8:25 a.m. to 10:35 a.m.: Stock Pitch Showcase

Track 1	SEAPORT A

Team 1: NYU/Stern
8:25 a.m. - 8:45 a.m.

Team 2: Yale
8:47 a.m. - 9:07 a.m.

Team 3: Tuck
9:09 a.m. - 9:29 a.m.

Team 4: Chicago, Booth
9:31 a.m. - 9:51 a.m.

Team 5: Duke
9:53 a.m. - 10:13 a.m.

Judges for Track 1:

Charles Hebard, Managing Director of Research, Fidelity Investments
Kate Lakin, Assistant Director of Global Equity Research, Putnam Investments
Joanne Pigassou, Director of Active Equity Research, TIAA-CREF
Karen Choi, Fixed Income Investment Analyst
Kailyn Murphy, Equity Investment Analyst

Track 2	SEAPORT BC

Team 6: Carnegie Mellon
8:25 a.m. - 8:45 a.m.

Team 7: Wharton
8:47 a.m. - 9:07 a.m.

Team 8: Cornell
9:09 a.m. - 9:29 a.m.

Team 9: Columbia
9:31 a.m. - 9:51 a.m.

Team 10: London Business School
9:53 a.m. - 10:13 a.m.

Team 11: Kellogg
10:15 a.m. - 10:35 a.m.

Judges for Track 2:

Barbara Burton, Equity Investment Analyst, Capital Group
Anastasia Canty, Vice President, Equity Research Analyst, Wellington Management
Aaron Cooper, Director of Global Equity Research, Putnam Investments
Alison O’Neill, Investment Officer, Equity Research Analyst, MFS
Richard Thompson, Managing Director of Research, Fidelity Investments
Nancy Took, Portfolio Manager, Small-Cap Team Leader, Eaton Vance Management
Tom Watson, Director of Research, T. Rowe Price

10:45 a.m. - 12:25 p.m. - WIN Round Robin Speed networking session 2	PLAZA A

Table 1: Capital Group; Table 2: PIMCO; Table 3: Causeway Capital; Table 4: Columbia Wanger Asset Management; Table 5: TIAA-CREF; Table 6: T. Rowe Price

Rotations will occur every 15 minutes at the following times: 10:45 a.m.; 11:02 a.m.; 11:19 a.m.; 11:36 a.m.; 11:53 a.m.; 12:10 p.m.

12:30 p.m. - 1:45 p.m. - Capital Group Luncheon Panel Keynote: LIGHHOUSE BALLROOM

What It Takes to Succeed in an Investment Management Career

Panelists:

Arachna Basi, Equity Investment Analyst
Barbara Burton, Equity Investment Analyst
Noriko Honda Chen, Portfolio Manager
Karen Choi, Fixed Income Investment Analyst
Natasha Moumier, Equity Investment Analyst
Kailyn Murphy, Equity Investment Analyst

CONCURRENT SESSIONS

2:00 p.m. - 3:00 p.m.: Concurrent Sessions 1	SEAPORT BC

Investment Strategy in the Current Economic Environment

Marta Bezoari, Senior Vice President, Account Manager, PIMCO
Katie Shaw, Research Analyst, Fidelity Investments
Eva Sudol, Portfolio Manager, Capital Group

Moderator: Scott Stewart, Clinical Professor, Johnson and Chair of the Board, Boston Security Analysts Society

Session A	SEAPORT A

How I Generate Investment Ideas

Sarah Kelterer, CEO, Fundamental PM, Causeway Capital
Courtney Koester, Fixed Income Investment Analyst, Capital Group
Stacey McAllister, CFA, Credit Analyst, Eaton Vance Management

Moderator: Pamela Hegarty MBA ’92, Boston Common Asset Management

3:05 p.m. to 4:05 p.m.: Concurrent Sessions 2	SEAPORT BC

How to Initiate Coverage on a Company/How to Interview Management

Megan Craig, Analyst, Equity Research, Putnam Investments
Anna Dapinin, Vice President, T. Rowe Price
Fritz Kaegi, CFA, Portfolio Manager, Columbia Wanger Asset Management
Mirette Kouchouk, Vice President, Research Analyst, PIMCO
Rayna Lesser, Portfolio Manager, Fidelity Investments
Kailyn Murphy, Equity Investment Analyst, Capital Group

Moderator: Pamela Hegarty MBA ’92, Boston Common Asset Management

Session B	SEAPORT A

Company Analysis by Asset class: Equities, Fixed Income (high yield, distressed, investment grade, etc), Quant

Karen Choi, Fixed Income Investment Analyst, Capital Group
Kira Connors, Analyst, Fixed Income Research, Putnam Investments
Vidya Kadiyam, Vice President, Quantitative Analyst, T. Rowe Price
Ellen Lee, Fundamental Portfolio Manager, Causeway Capital
Shilpa Mehta, Research Analyst/PIM, Fidelity Investments
Joanne Pigassou, Director of Active Equity Research, TIAA-CREF

Moderator: Scott Stewart, Clinical Professor, Johnson and Chair of the Board, Boston Security Analysts Society
ATTENDEES BY FIRM

**Capital Group**
Hilary Albritton, Talent Acquisition Senior Specialist
Archana Basi, Equity Investment Analyst
Erin Bell, Research Coordination Project Manager
Barbara Burtin, Equity Investment Analyst
Noriko Honda Chen, Portfolio Manager
Karen Choi, Fixed Income Investment Analyst
Alice T. Davison, Investment Group Recruiting
Jill Dennis, Investment Group HR Business Partner
Courtney Koester, Fixed Income Investment Analyst
Natasha Mourner, Equity Investment Analyst
Kaitlyn Murphy, Equity Investment Analyst
Eva Sudol, Portfolio Manager
Diana Wagner, Equity Investment Analyst

**Causeway Capital Management**
Sarah Ketterer, Chief Executive Officer
Ellen Lee, Fundamental Portfolio Manager
Negin Sohrabi, CFA, Fundamental Research Associate
Yifan Zhang, PhD, Quantitative Research Associate

**Columbia Wanger Asset Management**
Fritz Kaei, CFA, Portfolio Manager

**Eaton Vance**
Yana Barton, Portfolio Manager
Kimberly Gallun, Equity Analyst
Jason Krizter, Equity Analyst
Stacey McAllister, CFA, Credit Analyst
Edward Perkin, Chief Equity Investment Officer, Portfolio Manager
Douglas Rogers, Equity Analyst
Madhuleena Saha, Equity Analyst
Prachi Samudr, Equity Analyst
Nancy Tooke, Portfolio Manager, Small-Cap Team Leader
Stephanie Workman, Recruiter, Human Resources

**Fidelity Investments**
Elizabeth Cheverie, MBA Recruiter
Charles Hebard, Managing Director of Research
Rayna Lesser, Portfolio Manager
Shilpa Mehta, Research Analyst/PM
Jill O’Connell, VP, Talent Management
Melissa Reilly, Chief Investment Officer, Equity
Katie Shaw, Research Analyst/PM
Richard Thompson, Managing Director of Research

**MFS Investment Management**
Molly Frew, Equity Research Analyst
MaryLiz Lloyd, Investment Staffing Specialist
Lauren Luciano, Investment Staffing Manager
Alison O’Neill, Investment Officer, Equity Research Analyst
Erica Schulte, Equity Research Analyst
Nicole Zatlyn, Equity Portfolio Manager

**PIMCO**
Marta Bezoari, Senior Vice President, Account Manager
Kristen Chang, Recruiting Associate, Campus Recruiting
Stacie Sasaki-Glass, Vice President and Global Head of Campus Recruiting
Mirette Kouchouk, Vice President, Research Analyst
Elizabeth [Beth] MacLean, Executive Vice President, Portfolio Manager

**Putnam Investments**
Kira Connors, Analyst, Fixed Income Research
Aaron Coopers, Director of Global Equity Research
Megan Craigan, Analyst, Global Equity Research
Elizabeth Hansen, Analyst, Global Equity Research
Kathryn Lakin, Assistant Director of Global Equity Research
Christina Megillinger, Manager, Human Resources

**State Street Global Advisors (SSGA)**
Patricia Basso, Vice President and Senior HR Business Partner
Susanna Chiros, US Head of Talent Acquisition
Kem Danner, Head of Human Resources and Senior Vice President
Rachel Federico, Recruiting Coordinator, Global Human Resources
Tiffiny Hu, Vice President, Office of Regulatory Strategy and Execution
Deb Lorenzen, Chief Operating Officer, Global Product and Marketing
Jill Iacono Mavro, Managing Director and Head of the Strategic Relationship Group
Jay Turner, Vice President, Talent Acquisition

**TIAA-CREF Asset Management**
Mark Johnson, Senior Director, Talent Acquisition, Human Resources, Global Asset Management & Real Estate
Laura Parrott, Senior Director, Investment Grade Private Placement
Joanne Pigassou, Director of Active Equity Research

**T. Rowe Price**
Anna Dopkin, Vice President
Anouk Dey, Investment Analyst
Vidyam Kadiyam, Vice President, Quantitative Analyst
Jennifer Martin, Vice President and Portfolio Specialist, U.S. Equity Division
Tom Watson, Director of Research

**Wellington Management**
Anastasia Canty, Equity Research Analyst, Global Equity Portfolio Management
Alice Chen, Fixed Income Credit Analyst, Fixed Income Portfolio and Research
Melissa Harris, Human Resources
Alyssa Irving, Fixed Income Portfolio Manager, Fixed Income Portfolio Management
Cheryl Swanson, Business Analyst, Global Equity Portfolio Management
Emily Wilson, Business Manager, Fixed Income Business Management
<table>
<thead>
<tr>
<th>Name</th>
<th>School</th>
<th>MBA Class</th>
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<tr>
<td>Qing (Ella) Hou</td>
<td>Carnegie Mellon, Tepper School of Business</td>
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<td>Jean Lee</td>
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<td>Laasya Madduri</td>
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<td>Courtne Asher</td>
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<td>Neha Garg</td>
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<td>Elaine Zhu</td>
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Names in bold indicate students participating in the stock pitch showcase.
David J. Breazzano is a co-founder of DDJ and has more than 35 years of experience in high yield, distressed, and other credit investments. Prior to joining T. Rowe Price in 1985, he was a high yield analyst and vice president at First Investors Asset Management, which had over $1 billion in high yield assets under management. Mr. Breazzano began his professional career at New York Life as an investment analyst.

Mr. Breazzano is the author of the chapter entitled "Distressed Investing" in Leveraged Finance & Credit Markets: A Comprehensive Guide to High-Yield Bonds, Loans, and Other Instruments and co-author of the chapter entitled "Trading in the Distressed Credit Market" in the Fitch Ratings and Moody’s Investors Service Indexes in Defaulting and Turnaround Debt. He received his MBA from the Johnson School at Cornell University. He has an extensive background on the Board for the Parker Center for Investment Research at the Samuel Curtis Johnson Graduate School of Management at Cornell University. He has also been inducted into the Johnson Hall of Honor, the school’s highest award and was also selected as the Cornell University 2001 Entrepreneur of the Year.

Soumitra Dutta

Soumitra Dutta is the eleventh dean and professor of management and organizations in the Samuel Curtis Johnson Graduate School of Management at Cornell University. He is the most recently served as the Roland Berger Chaired Professor of Business and Technology and was the founder and academic director of the eLab at INSEAD, a top-ranked business school in Fontainebleau, France.

Previous roles Dutta has held during his 23-year tenure at INSEAD include dean of external relations; dean of executive education; and dean of technology and e-learning. He has served as a visiting professor in the Haas School at Berkeley, Oxford Internet Institute at University of Oxford, and Judge School at University of Cambridge in England. He has lived and worked in the U.S., Europe, and Asia, including stints as an engineer with GE in the U.S. and Schlumberger in Japan.

Dutta is an authority on the impact of new technology on the business world, especially social media and social networking, and on strategic management, innovation, and global restructuring. He is the co-editor and author respectively of two influential reports in technology and innovation — the Global Information Technology Report (co-published with the World Economic Forum) and the Global Innovation Index (to be co-published with the World Intellectual Property Organization). Both reports have been used by several governments around the world in assessing and planning their technology and innovation policies.


Dutta is a member of the Davos Circle, an association of long-time participants in the Annual Davos meeting of the World Economic Forum, and has engaged in a number of high-level dialogues to shape global, regional and industry agendas. He is on the advisory boards of several international business schools. He has co-founded two firms and is on the boards of several startups. He received the European Case of the Year award from the European Case Clearing House in 2002, 2000, 1998, and 1997. Dutta received a B.Tech. in electrical engineering and computer science from the Indian Institute of Technology, New Delhi. He received an MS in business administration, an MS in computer science, and a PhD in computer science from the University of California at Berkeley.

Dinner Keynote, Thursday, November 19

Fidelity Investments

Keynote Speaker: Melissa Reilly, CIO, Equity Group

Melissa Reilly is chief investment officer at Fidelity Management & Research Company (FMRCO), the investment adviser for Fidelity’s family of mutual funds. Fidelity Investments is a leading provider of investment management, retirement planning, portfolio guidance, brokerage, benefits outsourcing and other financial products and services to more than 20 million individuals, institutions and financial intermediaries. In this role, she is responsible for investment management oversight of the Capital Appreciation and Growth teams.

Prior to assuming her current position in March 2013, Melissa held various other roles with Fidelity, including that of portfolio manager of Fidelity Europe Capital Appreciation Fund, Fidelity Advisor Europe Capital Appreciation Fund, and the Europe portion of Fidelity Global Balanced Fund from 2007 to 2013, portfolio manager of Fidelity Nordic Fund from 2007 to 2011 and Fidelity Europe Fund from 2008 to 2012, and research analyst in the Global Research Group from 2004 to 2007. Before joining Fidelity in 2004, she worked as a research analyst at Fidelity.

Melissa holds a B.S. in Finance from the University of California at Berkeley.

Janet Glazer is a research analyst at Fidelity Management & Research Company (FMRCO), the investment adviser for Fidelity’s family of mutual funds. Fidelity Investments is a leading provider of investment management, retirement planning, portfolio guidance, brokerage, benefits outsourcing and other financial products and services to more than 20 million individuals, institutions and financial intermediaries. In this role, Janet is responsible for analyzing and rating stocks, supporting portfolio managers, and for coverage of multi-industrial and flow control companies within the industrials sector.

Prior to assuming her current responsibilities, Janet worked at Pyramis Global Advisors, a Fidelity Investments company. In this role, Janet was responsible for equity research coverage of US and Latin American industrials including conglomerates, metal, paper & forest products, defense, machinery, building products, transpots, professional services, engineering & construction, transportation logistics, and transportation infrastructure. Separately, she analyzed the global energy sector researching alternative energy, refining and coal equities.

Fidelity

BIographies

BIographies
Before joining Fidelity, Janet was a senior manager at E*TRADE Financial in charge of global trading and portfolios from 2006 to 2009.

Janet earned her bachelor of science degree in humanities with a focus on behavioral economics from the Massachusetts Institute of Technology and her master of business administration degree from the Massachusetts Institute of Technology Sloan School of Management. She was co-president of the Sloan Investment Management club.

Rayna Lessner Hannaway is a portfolio manager at Fidelity Management & Research Company (FMRCo), the investment advisor for Fidelity’s family of mutual funds. Fidelity Investments is a leading provider of investment management, retirement planning, brokerage, benefits outsourcing and other financial products and services to more than 20 million individuals, institutions and financial intermediaries. In this role, she is responsible for managing Fidelity Small Cap Stock Selector Fund from 2006 to 2007, Select Brokerage and Investment Management services to more than 20 million individuals, institutions and financial intermediaries. In this role, she was an assistant research analyst intern at Fidelity in 1998. Previously, Rayna was an assistant vice president at Citigroup Securities, Inc. from 1996 to 1997, and also worked as an associate for the Health Care, Media & Communications group at Citigroup Securities, Inc.

Charlie was an assistant research analyst at Fidelity in 1998. Previously, Charlie was an assistant vice president at Citigroup Securities, Inc. from 1996 to 1997, and also worked as an associate for the Health Care, Media & Communications group at Citigroup Securities, Inc.

Prior to assuming her current position, Charlie managed Fidelity’s small cap stock portfolio and in 2002 he also managed Fidelity’s small cap fund. In this role, Charlie was an equity research analyst covering the newspaper, gaming, and cruise ship and leisure durable industries starting in 1999. Before joining Fidelity full time, he was an equity research analyst intern at Fidelity in 1998. Previously, Charlie was an assistant vice president at Citigroup Securities, Inc. from 1996 to 1997, and also worked as an associate for the Health Care, Media & Communications group at Citigroup Securities, Inc.

Prior to assuming his current position in 2013, Melissa held various other roles with Fidelity, including that of portfolio manager of Fidelity Europe Capital Appreciation Fund, Fidelity Advisor Europe Capital Appreciation Fund, and the Europe portion of Fidelity Global Balanced Fund from 2007 to 2013, portfolio manager of Fidelity Nordic Fund from 2009 to 2011 and Fidelity Europe Fund from 2008 to 2012, and research analyst in the Global Research Group from 2004 to 2007. Before joining Fidelity in 2004, she worked as a senior vice president, portfolio manager, and International Core research analyst at Putnam Investments from 2002 to 2004. Prior to Putnam, Ms. Melnick was a research analyst at Morgan Stanley & Co., and as a staff consultant at Andersen Consulting, where she began her career in 1995. She has been in the investments industry since 1995.

Melissa earned her Bachelor of Arts degree in economics from Columbia University and her master of business administration degree from the University of Chicago.

Archana Basi is an equity research analyst at Capital Group. She has over 20 years of investment industry experience and is a member of the Boston Securities Analysts Society. Archana is based in London.

Prior to joining Fidelity in 2004, she was an equity research analyst at Putnam Investments from 2002 to 2004. Prior to Putnam, Ms. Melnick was a research analyst at Morgan Stanley & Co., and as a staff consultant at Andersen Consulting, where she began her career in 1995. She has been in the investments industry since 1995.

Melissa earned her Bachelor of Arts degree in economics from Columbia University and her master of business administration degree from the University of Chicago.

Rich earned his Bachelor of Science degree in finance from Bentley College.

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Pamela Hegarty, MBA ’92 is a Vice President and Global Equity Analyst at Boston Common Asset Management. She has 18 years of experience in equity research and portfolio management, specializing in the technology and energy sectors. Pam previously held positions with State Street Global Advisors, Baring Asset Management and Janus Capital. In addition, she served over two years as Director of Investor Relations for First Solar, an alternative energy company, and had earlier experience working for industrial and technology companies. Pam earned her A.B. from Harvard University and an MBA from Cornell University’s Johnson School. She is a CFA charter holder and a member of the Boston Security Analysts Society. In her free time, Pam enjoys playing ice hockey and has completed eight marathons.

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