Women in Finance:

Leadership & Lessons Learned

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Panel Discussion and Networking Reception

September 20, 2011
630 PM – 930 PM
The Fuqua School of Business

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Event Headliners

Lisa McGeough, Managing Director, Wells Fargo Securities
Caroline Brecker, Managing Director, J.P. Morgan
Paula Arrojo, Managing Director, Goldman Sachs

Additional Attendees

Claire Pearson, Barclays Capital, Investment Banking
Katy Knipp, J.P. Morgan, Private Wealth Management
Rachel Reed, ExxonMobil, Corporate Strategic Planning
Sarah Hartley, Wells Fargo, Investment Banking

Event Agenda

630 PM – 640 PM	**Introduction**
640 PM – 720 PM	**Keynote Address: Women in Finance** *Lisa McGeough*
725 PM – 825 PM	**Panel Discussion and Q&A** *Lisa McGeough, Caroline Brecker, Paula Arrojo* Moderated by: Meg Flournoy
825 PM – 930 PM	**Networking Reception**

"Think BIG! Men are more ambitious than women the day they graduate from college and they remain more ambitious every step along their career path. We will never close the achievement gap until we close the ambition gap….

*Leadership starts with **you**."*

--Sheryl Sandberg, COO, Facebook

Panelist Biographies

Lisa McGeough
Managing Director,
Senior Relationship
Manager
Wells Fargo

Lisa McGeough is a managing director and senior relationship manager in Wells Fargo's Institutional Investor Management, part of Wells Fargo Securities. Based in Charlotte, N.C., she is the chief liaison to the top institutional trading partners of Wells Fargo Securities, creating strategic partnerships utilizing Wells Fargo's competitive advantages. Lisa is also a member of the Wells Fargo Securities Development & Engagement Council.

As a Diversity Champion, she works to recruit, retain and advance talented employees within the company. Lisa joined Wachovia in 2005 and brings over 20 years of fixed-income sales experience. Previously, she spent eight years with Morgan Stanley Inc., where she was a director in High Yield Sales. Lisa was a senior high-yield producer, covering asset managers for leveraged loans, bonds, and structured products. She also was the high-yield product manager for generalist sales, the head of High-Yield Recruiting, and co-chaired the company's Women's Fixed-Income Networking Committee.

Lisa earned her B.A. in economics, graduating *magna cum laude*, from Bowdoin College in Brunswick, Maine. Active in the community, Lisa is on the board of the Council for Children's Rights and a member of both Women Corporate Directors and Women Executives in Charlotte. Lisa was also Chair of Wachovia's Women's Initiative, which worked to recruit, retain, and advance talented women within the company. Lisa has three children and lives with her husband in Charlotte.

Caroline Brecker is a Managing Director in the J.P. Morgan Private Bank. She leads a team of twenty six seasoned professionals in Greenwich, Connecticut who advise 700 clients with $20 billion in assets. She has extensive experience in developing private client relationships and advising families of substantial wealth in Connecticut and New York. She was recognized in 2008, by Connecticut Magazine as one of the top ten financial advisors in Connecticut and by Barron's in 2009 for the same distinction.

Caroline has spent over 20 years in the financial industry. Before being recruited to join JPMorgan in 1997, she held positions with Bankers Trust, and Chemical Bank covering institutional clients.

Ms. Brecker holds a B.A. and M.B.A. from Duke University and has remained very involved in the University both as a fundraiser and as a member of the Financial Partnership Steering Committee. She is head of the Advisory Board of The Breast Cancer Alliance, and serves on the Board of the YWCA of Greenwich. She is also on the Advisory Board of the Center for Financial Excellence at The Fuqua School of Business. She resides with her husband, Jon Yenor, and three sons in Riverside, Connecticut.

Caroline Brecker
Managing Director
J.P. Morgan

Paula Arrojo
Managing Director
Goldman Sachs

Paula is a private wealth advisor and team leader in New York Private Wealth Management. She joined Goldman Sachs in 2000 as an investment professional and was named managing director in 2010.

Prior to joining the firm, Paula worked at Chase Manhattan Bank for eight years as a senior relationship manager for high net worth Latin American clients.

Paula earned a BA in Comparative Area Studies, Political Science and Spanish from Duke University in 1992 and an MBA from the Wharton School of the University of Pennsylvania in 1999.