

2020 TIAA Institute Virtual Women's Leadership Forum

New dawn. New realities. New opportunities.

Program and Speaker Bios

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2020 TIAA Institute Women's Leadership Forum

New dawn. New realities. New opportunities.

Dear Colleagues:

Welcome to the TIAA Institute's third annual Women's Leadership Forum. In a year of extraordinary health and economic challenges, we have designed a virtual program for women leaders centered on two critical topics: leadership excellence and financial well-being.

How are women guiding their organizations through these unprecedented times? What does the research tell us about women's financial wellness—and ways to promote it? How can women expand their networks and profit from one another's shared experiences?

These are among the questions we will explore today. To do so, we have once again convened an amazing group of diverse, highly accomplished women in higher education, healthcare, business and the charitable sector. You'll find a detailed agenda, biographies of speakers and links to resources on the pages that follow.

While the format of this year's Women's Leadership Forum is different, the opportunities to learn from, connect with and be inspired by exceptional women remain the same. Thank you for adding your voice to this important discussion! Stay safe and be well.

Sincerely,

A handwritten signature in black ink that reads "Stephanie".

Stephanie Bell-Rose
Senior Managing Director and Head
TIAA Institute



2020 TIAA Institute Women's Leadership Forum

New dawn. New realities. New opportunities.

Held virtually
Friday, October 9, 2020

12:30 to 12:45 p.m.

Welcome

Stephanie Bell-Rose, Senior Managing Director and Head
TIAA Institute

12:45 to 2:15 p.m.

Embracing New Realities: What Leadership Excellence Looks Like Today!

Facilitated discussion exploring leadership perspectives arising from the circumstances of the last year and with consideration of an uncertain future. Now is the time for women to unleash their power and distinctive capabilities to be forces for positive change.

Hear from leaders across sectors on how they are:

- Navigating uncharted waters
- Prioritizing with purpose while maintaining empathy
- Adding their voice to national conversations
- Making tough decisions without compromising mission and values
- Balancing efficiency and positive morale
- Managing stress and maintaining passion

Moderator: **Tara Giuliano**, Head of Client and Product Marketing, Nuveen

Panelists: **Subha Barry**, President, Working Mother Media

LaRay Brown, President and CEO, One Brooklyn Health System

Hilary Pennington, Executive Vice President of Programs, Ford Foundation

Cynthia Teniente-Matson, President, Texas A&M University – San Antonio

Questions fielded from audience: **Mauriel Avina**, Managing Director, National Advocacy and Client Engagement, TIAA

2:15 to 2:30 p.m.

Break

2:30 to 3:45 p.m.

Embracing New Realities: Important Considerations for Women's Financial Well-being

What does research tell us about women and financial wellness? Understanding the facts about women's financial literacy, their preferences for how to receive financial guidance and advice, and their attitudes and behaviors related to financial decisions can help you help yourself and those you support through your leadership roles. Furthermore, when it comes to personal financial wellness, it is important to know where you are financially with consideration of where you want to be, what adjustments might be needed to get on track, and what future challenges or opportunities you may want to be planning for now.

Hear perspectives from two personal finance experts, and raise your questions and concerns.

Moderator: **Christina Cutlip**, Senior Managing Director, Head of National Advocacy & Client Engagement, TIAA

Panelists: **Annamaria Lusardi**, Professor and Head of the George Washington University Financial Literacy Excellence Center, The George Washington University School of Business

Jill Popovich, Senior Managing Director, Head of Field Advisory Services, TIAA

Questions fielded from audience: **Tonya Murray**, Senior Director, Institute Marketing, TIAA

3:45 to 4 p.m.

Closing Remarks

Corie Pauling, Senior Vice President, Chief Inclusion & Diversity Officer, Head of Corporate Social Responsibility, TIAA

Subha Barry

Working Mother Media



Subha V. Barry is President of Working Mother Media. She oversees Working Mother magazine, workingmother.com, Diversity Best Practices (the leading corporate membership organization supporting diversity and inclusion), the National Association for Female Executives (NAFE) and Culture@Work.

Subha's career spans 30 years of experience in front-line business, operational, and leadership roles where she has built cohesive and productive teams to be agents of change. She has shown how strong and inclusive leadership can drive business results and profitability.

During her 21 years at Merrill Lynch, Subha was a wealth advisor, a branch manager, the leader of the Multicultural Business Development Group and Global Head of Diversity and Inclusion.

At Freddie Mac, she was the Senior Vice President and Chief Diversity Officer with oversight of Diversity & Inclusion, Supplier Diversity, Community Engagement and the Freddie Mac Foundation.

She has taught Gender Policy at Columbia University and speaks passionately about the ability to drive innovation by embracing diversity and creating a culture of inclusion. She serves on a number of boards aligned with her passions— education, cancer research and women's advancement.

Stephanie Bell-Rose

TIAA Institute



Stephanie Bell-Rose leads the TIAA Institute, which conducts and publishes original research and insights on issues pertaining to financial security and organizational effectiveness for the education, non-profit and public sectors. Prior to her appointment at TIAA, she served as president of the Goldman Sachs Foundation, and as General Counsel and program officer at the Andrew W. Mellon Foundation.

Bell-Rose currently serves on the Boards of Trustees of The John S. and James L. Knight Foundation, the Public Welfare Foundation, the Council on Foundations, and the Association of Black Foundation Executives, and is on the Board of Overseers of Columbia University's School of Professional Studies. She is a member of The Gates Scholarship Advisory Council, the Council on Foreign Relations, the Economic Club of New York, the Executive Leadership Council, and the Women's Forum of New York City. After a number of years of board service, she remains an Honorary Trustee of the American Museum of Natural History and Trustee Emerita of the Barnes Foundation.

She earned her A.B., J.D. and M.P.A. degrees from Harvard University

LaRay Brown

One Brooklyn Health System



LaRay Brown was appointed in July 2017 as the Chief Executive Officer (CEO) of the One Brooklyn Health System, Inc., serving Central and Northeast Brooklyn, is comprised of twelve ambulatory care centers, three hospitals, two nursing homes, an assisted living and independent living facility, a transitional housing program, an urgent care center, and a retail pharmacy. Ms. Brown was instrumental in the founding of One Brooklyn Health System and bringing together the three diverse boards of Brookdale Hospital Medical Center, Interfaith Medical Center, and Kingsbrook Jewish Medical Center to create One Brooklyn Health System, Inc. and establish a new governance structure that would accommodate the combination of these three health systems.

As CEO of One Brooklyn Health System, Ms. Brown is now responsible for the clinical and administrative integration of three health systems and the Implementation of a \$664 million capital program funded pursuant to the New York State Health Care Facility Transformation Program: Kings County. Ms. Brown also currently serves as the President and CEO of Interfaith Medical Center in Brooklyn, a position to which she was appointed in February 2016.

Prior to becoming CEO of Interfaith Medical Center and One Brooklyn Health System, Ms. Brown enjoyed a 28 year career with the largest municipal healthcare system in the nation; her last positions being that of Senior Vice President for Corporate Planning, Community Health and Intergovernmental Relations and Corporate Officer at the New York City Health and Hospitals (H&H).

Ms. Brown is past Chairperson of the National Association of Public Hospitals and Health Systems (now America's Essential Hospitals). Ms. Brown served as a member of New York State Governor Andrew Cuomo's health care transition and Medicaid Redesign teams. She also served on the Board of the New York State Health Foundation.

Ms. Brown graduated summa cum laude from the University of Pennsylvania and received her graduate training at the University of Pennsylvania FELS Center for Government Policy. She is also the recipient of numerous awards and mention in the Congressional Record. Ms. Brown has been named by "Modern Healthcare" as one of the Top 25 Women in Healthcare.

Christina Cutlip

TIAA



Christina Cutlip is a Senior Managing Director for the Institutional Financial Services division of TIAA (www.tiaa.org), a Fortune 100 financial services organization. She is the head of the Client Engagement & National Advocacy team, which is responsible for expanding relationships with industry and government associations, while also focusing on client engagement.

In 2011, Christina was recognized as TIAA's Working Mother of the Year by Working Mother magazine and received an Outstanding Volunteer Award in 2016 from The Council of Independent Colleges (CIC) State Fund Network for her contributions to higher education. She was appointed by the Secretary of Labor to the Department of Labor ERISA Advisory Council for a three-year term from 2013 - 2016. Christina is on the board of The Council of Independent Colleges (CIC), and chairs the board of Almasi Collaborative Arts, a non-profit organization that strives to create and facilitate artistic collaborations between African and American artists and American artistic institutions. She serves on the board of retirement healthcare provider Emeriti, the Board of Trustees for Grinnell College and on the advisory councils of WISER and ERIC.

Christina earned a B.A. in Economics from Grinnell College, an MBA from Regis University and a Ph.D. in Organizational Leadership from Northcentral University. As a FINRA registered representative and principal, she holds Series 7, 24 and 51 licenses while maintaining accident, health, life and variable annuity licenses. Additionally, Christina has obtained the Certified Employee Benefits Specialist (CEBS) professional designation.

Tara Giuliano

Nuveen



Tara oversees client and product marketing for Nuveen. She is instrumental in effectively bringing Nuveen's collective investment capabilities to our clients. Tara oversees a team that develops and executes on go-to-market plans aimed at acquiring, retaining and expanding client relationships while producing compelling investment stories that differentiate Nuveen from our competitors and address specific client needs.

Prior to joining the firm in 2018, Tara held senior roles at UBS Asset Management as institutional global head of marketing and head of marketing for the Americas. She was also the CMO at Sikich, a professional services firm. She was also the director of asset management marketing at Morningstar and has held marketing roles at Allianz Global Corporate & Specialty and Nationwide.

Tara graduated with a B.S., cum laude, with honors and with distinction, in Business Administration from The Ohio State University and a master's in Communications from DePaul University. She is on the Ambassador Board for Dymynd Angels, a female focused angel investment initiative. Tara also works with Access Living, a non-profit assisting the disabilities community and Night Ministry, an outreach program helping to feed Chicago's homeless..

Annamaria Lusardi

The George Washington University



Annamaria Lusardi is University Professor of Economics and Accountancy at the George Washington University. Moreover, she is the founder and academic director of the Global Financial Literacy Excellence Center (GFLEC). Previously, she was the Joel Z. and Susan Hyatt Professor of Economics at Dartmouth College, where she taught for twenty years. She has also taught at Princeton University, the University of Chicago Harris School of Public Policy, the University of Chicago Booth School of Business, and Columbia Business School. From January to June 2008, she was a visiting scholar at Harvard Business School. She holds a Ph.D. in Economics from Princeton University.

Prof. Lusardi has also won numerous research and other awards. The more recent ones include the Kahneman Lecture at the 2019 annual meeting of economic psychology and behavioral economics (IAREP/SABE), the 2018 Ketchum Prize from FINRA Investor Education Foundation, the 2018 Oscar and Shoshana Trachtenberg Prize for Faculty Scholarship, the 2017 Skandia Research Award on Long-Term Savings (awarded in Sweden), the 2015 Financial Literacy Award from the International Federation of Finance Museums (awarded in China), the 2014 William A. Forbes Public Awareness Award from the Council for Economic Education, the 2013 William E. Odom Visionary Leadership Award from the Jump\$tart Coalition for Personal Financial Literacy, and the National Numeracy Network's inaugural 2012 Steen Award.

In 2018, she received an honorary degree of Doctor of Science (Economics and Business Administration) from the University of Vaasa in Finland. In 2019, she was included in the Forbes list of the 100 successful women in Italy.

In addition to her academic research, Prof. Lusardi works to disseminate her research results to a broad audience, with the goal of impacting policies and financial education programs. She blogs about her research findings for the *Wall Street Journal* and *Forbes*. She is also a member of *CNBC's* Financial Wellness Council.

Her expertise is valued by policy makers. In 2009, she served as a faculty advisor for the Office of Financial Education of the U.S. Treasury. In August 2017, she was appointed Director of the Financial Education Committee in charge of designing the national strategy for financial literacy in Italy.

Corie Pauling

TIAA



At TIAA since 2006, Corie Pauling became the organization's Senior Vice President, Chief Inclusion & Diversity (I&D) Officer and Head of Corporate Social Responsibility in July 2018. Corie was instrumental in the launch of the I&D function at TIAA over ten years ago and served as a primary legal and business advisor and thought leader in this area. In her prior role, Corie held the position of Senior Director, Associate General Counsel in the Employment, Benefits & Labor Law Group, in which she provided counseling, training, risk assessment and other support to TIAA's executives, its prior I&D leaders and other Human Resources leaders and also business managers on a broad range of workforce issues. She also leads the TIAA enterprise's Corporate Social Responsibility function, which last year led over 650 community service projects through 15,000 employee volunteers. Corie also led the Culture Action Team for TIAA's Advocacy & Oversight area from 2016 through 2018.

An engaged civic leader and also a competitive 11-time marathoner, Corie was incredibly honored to be named on the list of 2019 Black Enterprise Most Powerful Women in Corporate Diversity and also to be recognized as a TIAA Working Mother of the Year in conjunction with the national publication Working Mother and a recipient of the Young Civic Leader Award by the Thurgood Marshall College Fund. She is a graduate of Charlotte's groundbreaking Leadership Development Institute. Corie also served on the Board of Governors of the North Carolina Bar Association (NCBA) and as chairperson of the NCBA's 500-attorney Labor and Employment Law Section. Among other leadership posts, she also served as a committee chair of the Board of Directors for the Levine Museum of the New South, a member of Charlotte's Arts & Science Council Advisory Committee and a co-chair of the Mecklenburg County Bar's Diversity and Inclusion Committee. As also an avid "late bloomer" runner, she is thrilled to have run the Boston Marathon for the first time in 2018 and is training now to qualify for the 2021 running.

Corie holds a Bachelor of Science degree in Industrial and Operations Engineering from the University of Michigan College of Engineering and also a Juris Doctor from the Northwestern University School of Law.

Hilary Pennington

Ford Foundation



Hilary Pennington serves as Executive Vice President for Programs at the Ford Foundation. In this capacity, she oversees all of the foundation's programs globally, working closely across programs and offices to ensure strategic, meaningful, and well-aligned global grant making. Before assuming her current role, she served as the foundation's Vice President for Education, Creativity, and Free Expression.

Prior to joining Ford in 2013, Hilary served as director of education, postsecondary success and special initiatives at the Bill & Melinda Gates Foundation, was a senior fellow at the Center for American Progress, and president and CEO of Jobs for the Future (JFF), a research and policy development organization she co-founded. Hilary also served on President Bill Clinton's transition team and as co-chair of his administration's presidential advisory committee on technology.

She is a graduate of the Yale School of Management and Yale College and holds a graduate degree in social anthropology from Oxford University and a master's degree in theological studies from the Episcopal Divinity School.

Jill Popovich

TIAA



Jill Popovich has spent the past 20+ years helping others achieve their financial goals and dreams. A love of financial planning paired with a passion for leading and developing high performing teams has led her to her current role as Senior Managing Director of Wealth Management for TIAA.

Jill started in the financial services industry in a client service support role. It became clear to Jill in her very first interaction with a client that she was meant to help others achieve their financial goals and aspirations. Little did she know that she would spend the next 20 years of her career at TIAA, taking on countless new experiences, expanding her knowledge and leading teams of individuals with the same passion as she had.

Today, as the Head of Field Advisory Services, Jill continues to serve our individual clients while coaching, leading and growing high-performing teams nationally across the organization.

Cynthia Teniente-Matson

Texas A&M University – San Antonio



Dr. Cynthia Teniente-Matson is the President of Texas A&M University-San Antonio (A&M-SA) and is a San Antonio native with over 30 years of higher education experience in Alaska, California and Texas. In 2016, she led the university's transformation from upper division to a comprehensive master's university in addition to achieving the U.S. Department of Education Hispanic Serving Institution (HSI) designation.

Dr. Teniente-Matson has led strategic initiatives and partnerships including the creation of the Mays Center for Experiential Learning and Community Engagement, Cisneros Institute for Emerging Leaders, Institute of Water Resource Science and Technology, Cyber Engineering Technology/Cyber Security Research Center and the university's first Facebook CyberSecurity University Program. She has led the redevelopment of the campus' 694-acre masterplan to support its accelerated growth including approximately \$200 million in new facilities, infrastructure improvements and P3 partnerships, and developed support from elected officials to build an economic regional hub for south Bexar County. She also created the President's Commission on Equity (PCOE) to advance equity and inclusion.

Dr. Teniente-Matson has been recognized world-wide and nationally for her leadership and service. In 2020, she was awarded the Japan Foundation Center for Global Partnership's 2020 US-Japan Public Intellectual, and in 2019 she was recognized as a Network for Change and Continuous Innovation's (NCCI) top 20 Thought Leaders in Change and Innovation. She has also received the NACUBO Professional Development Award, Making a Mark on the World Innovation Award from the San Antonio Hispanic Chamber, the Top 10 Professional Woman of the Year Award from the Marjorie Mason Center, the Women's Leadership Award from the SA Business Journal, the Comet Award from the SA Women's Chamber, the Hope Award from the Hispanic Organization for Public Employees, the Civil Leader Award from La Prensa, and The Top 40 under 40 from the Alaska Journal of Commerce.

Dr. Teniente-Matson serves on numerous national educational-governing and local civic boards and is a sought-after author, speaker, and mentor on traditional and contemporary issues in higher education leadership. She and her husband Mike have two sons: Phillip and Wyatt.

TIAA Institute Thought Leadership on Women's Career and Financial Success

Since its founding in 1998, the TIAA Institute has been committed to—and sponsored numerous studies on—issues affecting women's career and financial success. Below are links to recent noteworthy papers. For these and additional papers, please visit our website, tiaainstitute.org.

Women and Retirement Security

Annamaria Lusardi and Olivia S. Mitchell

Compared to previous generations, older women are currently carrying more debt and facing retirement in a more financially precarious position. This paper examines data from several large-scale studies to show how today's older women manage their household debt and plan for retirement.

Financial Capability and Financial Literacy among Working Women: New Insights

Annamaria Lusardi and Carlo de Bassa Scheresberg

Improvements in the overall economy between 2012 and 2015 have enhanced working women's short-term financial position. But their long-term financial status and levels of financial knowledge have changed very little.

The Power and Potential of Diversity and Inclusion

Maureen Devlin

Today's diverse student body represents a vast spectrum of backgrounds, values and beliefs, which presents challenges for higher education leaders striving to help all students reach their potential while operating within financially constrained parameters.

Leadership in Action: TIAA Institute Theodore M. Hesburgh Leadership Excellence Award Winners

Maureen Devlin

A look at the lives and accomplishments of these 10 diverse Hesburgh Award winners provides unique insights on what it means to provide leadership excellence in higher education.

Taking the Measure of Faculty Diversity

Valerie Martin Conley, Martin Finkelstein and Jack H. Schuster

Faculty career paths have changed radically in recent decades—just as more opportunities surfaced for women and minorities. This paper breaks down the numbers to present a definitive look at today's academic workforce and how it has evolved.

Innovation, Transformation, and Change Leadership: A Compendium Based on TIAA Institute's Symposia and Related Work

Maureen Devlin

This compendium of Institute-commissioned work on innovation and change offers ideas and suggestions all leaders—women and men alike—will find meaningful.

TIAA Institute Thought Leadership on Women's Career and Financial Success

Causes and Consequences of Financial Mismanagement at Older Ages

Marguerite DeLiema, Martha Deevy, Annamaria Lusardi and Olivia S. Mitchell

Poor financial capability in old age can have serious repercussions, causing people to make mistakes with credit, draw down retirement assets too quickly, and fall victim to financial predators.

Voices from the Field: Women of Color Presidents in Higher Education

American Council on Education and TIAA Institute

Women of color presidents and chancellors describe how their race and gender has affected their careers and suggest ways to diversify the college presidency.

Key Issues Facing Higher Education Philanthropy

Una Osili

In an era of declining public funding, private philanthropy has played an increasingly vital role for both public and private institutions.

2019 TIAA Institute Women's Leadership Forum

TIAA Institute

This one-day convening provided unrivaled opportunities for women executives to learn from each other's experiences, gain new career insights and share strategies for enhancing personal impact.

Financial Literacy in the United States and Its Link to Financial Wellness: The 2019 TIAA Institute-GFLEC P-Fin Index

Paul Yakoboski, Annamaria Lusardi and Andrea Hasler

Many Americans lack the personal finance knowledge needed for sound financial decision making.



About the TIAA Institute

The TIAA Institute helps advance the ways individuals and institutions plan for financial security and organizational effectiveness. The Institute conducts in-depth research, provides access to a network of thought leaders, and enables those it serves to anticipate trends, plan future strategies and maximize opportunities for success. To learn more, visit www.tiaainstitute.org.