



WOMEN IN CONSUMER FINANCE

2022 AGENDA













Thoughtfully crafted to give you ample opportunity
to network, learn, and build great relationships.










**December 5-7 at the Renaissance Esmeralda
Resort & Spa in Palm Springs**

Agenda At-a-Glance

Monday, Dec. 5

9:30-Noon		Pre-conference activities: Hiking, Golf, Palm Springs Tour (additional fee - details on event website)	
Noon-2:30		Open for Networking	
2:30-3:45		CONFERENCE OFFICIALLY OPENS Team Experience (see p. 10 for details)	
4:00-5:40		General Session: Keynote - Anu Shultes (See p. 4 for details) Storytellers (See p. 5 for details)	 
5:40-6:40		Networking Reception with photo booth sponsored by  DebtNext Software	
6:40-?		Dinner with your Team (Check with your team leaders for details)	

Tuesday, Dec. 6

7:00-7:45		Gentle, No-Shower Yoga	
7:30-8:30		Breakfast	
8:30-9:45		Workshop #1: The Great Re-Thinking (see details on p. 6)	
9:45-10:15		Break	
10:15-11:30		Workshop #2: Enhancing your Business & Leadership Skills (see details on p. 7)	
11:30-12:45		Lunch	



Good time to schedule meetings, office check-ins, or meet new people



Expect active, engaged learning & discussion















Build special relationships with your assigned teammates










Expect inspirational stories & advice

Tuesday, Dec. 6

12:45-1:55		General Session Storytellers (See p. 5 for details) 
		Keynote - Crystal Lynese Walker (See p. 4 for details)
2:00-3:15		Team Bonding - Trivia Smack-Down (See p. 10 for details) 
3:15-3:45		Break
3:45-4:45		Structured Networking Activity (See p. 9 for details) 
4:45-6:30		Open for Networking
6:30-9:00		Dinner & Dancing with photo booth sponsored by  DebtNext Software  A TransUnion® Company
9:00-?		Meet new friends at the fabulous lobby bar or outdoor firepit

Wednesday, Dec. 7

7:00-7:45		Gentle, No-Shower Yoga
7:30-8:30		Breakfast
8:30-9:45		Workshop 3: Managing Your Career (See p. 8 for details)  
9:45-10:00		Break
10:00-11:00	 	Closing Keynote - Fireside chat Trisha Asgeirsson - former SVP Mastercard, JPMC Lisa Bonalle-Hannan - President, Verisk Financial Additional panelist TBA  Powerful Final Workshop - Reflections 

Agenda Detail: Keynotes



Monday, December 5 @ 4:00 PM

Anu Shultes - CEO, Ahead Financials

Anu Shultes is an entrepreneur and Forbes 50 Over 50 honoree for her commitment to and progress towards financial inclusion. She is a 30-year veteran of the financial services industry with senior leadership roles at Provident, National City, AccountNow, Blackhawk Network and more. She is most recently the CEO of Ahead Financials. Anu is passionate about building products that get people ahead financially. Her significant experience in building efficient operational processes and teams to support them has led her to become one of the few female CEOs in Fintech.

Anu will share her incredible story of challenge, resilience and achievement.

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Tuesday, December 6 @ 1:25 PM

Crystal Lynese Walker - Senior Director, Management Leadership for Tomorrow

Crystal currently leads MLT's Black Equity at Work Certification program for employers. MLT is a national nonprofit that is transforming the leadership pipeline. Today, MLT has transformed the careers and life trajectories of more than 8,000 Black, Latinx, and Native American individuals. MLT partners with leading companies, social sector organizations, and universities to strengthen their recruitment and retention of diverse talent.

For over a decade Crystal has helped organizations curate equitable and inclusive workplaces through result-driven methods. Her experience spans several industries, including sales, telecommunications, property management, and higher education. She balances work by exploring life as a Black elder millennial woman who enjoys comic books, music, small business shopping, plants, and naps as a form of resistance.

Crystal will share her wisdom about how we build true sisterhood among professional women, even though there are true power differences among us due to differences such as race, socio-economic background, sexual orientation, body type, and more.

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Agenda Detail: Fireside Chat

Wednesday, December 7 @ 10:00 AM

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Trisha Asgeirsson

**Former SVP and Group Head
@ Mastercard**

Trisha Asgeirsson is the founder and CEO of Asgeirsson Consulting, an advisory practice for fintech, banking, and retail technologies working with early-stage and emerging companies on strategy development, channel partnerships, and go-to-market planning.

She is the former SVP of Mastercard's data & services business, where she spent 20 years as one of the builders of what is now a multi-billion-dollar business for Mastercard worldwide. Prior to Mastercard, Trisha led the JP Morgan Chase loyalty business and created their world-leading Consumer Card value proposition.



Lisa Bonalle Hannan

**President @
Verisk Financial**

Lisa Bonalle-Hannan is president of Verisk Financial, where she drives business growth and innovation. Lisa has more than 30 years of experience in the financial services and information services industries and has led corporate strategy and product development and business unit management. Additionally, she conceived, developed, and spun-off a digital marketing effectiveness and spend analytics business, Commerce Signals.

Before Verisk, Lisa was the president of Financial Solutions for Affinion Group, owned by Apollo and General Atlantic. She also held executive leadership positions in the credit card divisions of Citibank, where she was president of the largest Citi Cards portfolio and JPMorgan Chase, where she was Chief Strategy Officer for the payments division.



Susan Fahy

**EVP & Chief Digital Officer
VantageScore**

As EVP and Chief Digital Officer, Susan Fahy leads all digital channels across VantageScore's organization and product offerings.

An acknowledged leader in data product innovation, Ms. Fahy has more than 25 years of experience in financial services, analytics and fin-tech. Before VantageScore, she led analytics capabilities within the payments and product teams at Bank of America and Fiserv.

Prior to Fiserv, Ms. Fahy was SVP of Supply Chain Analytics at Citibank and Vice President of Product at First Data (acquired by Fiserv). At Citibank and First Data, Ms. Fahy led teams that transformed analytics, defined insights, and drove innovation.

Ms. Fahy received her Master of Business Administration from Dowling College and Bachelor of Science degree in Business Management at Carlow College.

Agenda Detail: Storytellers

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Tiffany Winfield
Principal Risk Specialist
Capital One



Tonia Brown
Senior Compliance Advisor
ARM Compliance Business Solutions



Poorani Jeyasekar
Director
Klaros Group

December 5
5:00-5:40 PM



Lissette Jorgensen
COO, Sustainable Finance Group
Goldman Sachs



Vanessa Maren
Senior Director, Business Development
VISA



Rhonda Bettis
SVP, Retail Banking Director
Citizens Bank



December 6
12:45-1:25 PM



Agenda Detail: Workshop #1

The Great Re-Thinking: December 6 @ 8:30 AM

Although many refer to The Great Resignation, we know that this step isn't - and needn't be - for everyone. However, so many of us are engaged in a Re-thinking about how to pursue the most satisfying life and career. Select one of the workshops below to gain new perspective on your values, your goals, or your approach to work-life balance.

Choice 1 **Do you ever feel overwhelmed when making decisions? Gain confidence by learning how to align your decisions with your core values.**

When we begin to make decisions that are aligned with our true values, we experience a harmony in our work and everyday lives that is more authentic, productive and fulfilling. In this workshop we will take you on a journey where you will learn how to identify your core values (what matters most to you), explore ways to model them every day (see how they're playing out in your life) and learn how to align your decision making and goals based on those values.

Workshop leaders: Shelly Sheppick, The iA Institute and Lisa Wallace, Vion Investments

Choice 2 **Setting personal goals - What are your aspirations? Do you set clearly defined personal goals? If so, do you achieve them? If not, where do you start?**

We all have goals in our day-to-day jobs, but do you have clearly defined personal or aspirational goals? If so, do you regularly achieve them? In this engaging and interactive session, you will learn to view goal setting with a new perspective, and you'll start the ball rolling by designing a new goal for yourself -- or adjusting your approach to a goal you've already set. We will also address the important ways in which women approach goals differently than men.

Workshop leaders: Love Chambers, Citizens Bank and Melanie Reid, Citizens Bank

Choice 3 **Balancing work and non-work (aka "work-life balance" — but isn't work part of life?)**

Balancing a full-time job with your 24-hour job called life can be challenging, and these days it can be hard to know where work ends and your personal life begins. Also, the meaning of balance is different for everyone. In fact, it even changes for the same person throughout her career. This session will provide a framework for evaluating where you are, what may be out of balance, and tools to help you move forward. We'll address things like structuring your day so you always feel accomplished, setting boundaries to make the most of your time at work without feeling guilty, and putting your current situation into a broader perspective that helps you engineer the life you want.

Workshop leaders: Ellen Hart, 1st Franklin Financial Corporation and Laura Jimenez, Heights Finance Corporation

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Agenda Detail: Workshop #2

Enhancing Your Business & Leadership Skills: December 6 @ 10:15 AM

In many cases, this is why your company supports your WCF attendance. Learning how to supercharge your performance, maximize every connection, and be the kind of manager nobody wants to leave will enhance your career AND make you a more valuable employee.

Choice 1 How to break the cycle of fear and self-paralysis to take your performance to the next level

In this workshop, we are going to examine how we think, learn new ways to do so, and challenge ourselves in new ways. We'll define our fears rather than our goals, and learn to break the cycle of self-paralysis in order to jump to the next level. We'll learn to control our thoughts, speak our dreams aloud, and cultivate the skill of deep thinking to go beyond what we think we know to achieve more focused and impactful results.

Workshop leaders: Roxanne Bartley, Bartley Ventures and Aleah Heath, Unifund

Choice 2 Moving from transactional communications to transformational connections

Transformational exchanges occur between individuals at any stage of a relationship and empower, enlighten, evoke a vision, or advance BOTH parties' agendas, personally and professionally. Learn how to give and get the most out of every relationship. Do you know what you have to offer and what you have to gain? Do you know, and are you practicing, the boundaries required to succeed in your relationships? Are you capable of maintaining the connection? We'll answer these questions and more!

Workshop leaders: Rebekah Luebcke and Lisa Rozzelle, Crown Asset Management

Choice 3 People don't quit companies - they quit managers. How to be a great one

Are you a new or experienced manager? Either way, you know that your relationship with each employee is important, and also the way the whole team interacts is vital. Team culture is not something you can force, but with emotional intelligence and openness to opportunity, you can steer it in the right direction and grow a thriving team. This will be a very interactive session. With a little effort, a lot of fun and some self-reflecting, you'll realize the key to being a great boss is mostly about having confidence in your ability to lead your team to success.

Workshop leaders: Danielle Banner, Estate Information Services, Victoria Edwards, Livevox, Kelly Feoli, MRS BPO, and Dawn Fletcher, Livevox



This entire set of workshops is sponsored by

Agenda Detail: Workshop #3

Managing Your Career: December 7 @ 8:30 AM

Every year our attendees are most interested in how to effectively navigate their careers in a way that maximizes their potential and their opportunities to give back. These are the hottest topics everyone wants to address.

Choice 1 **How to identify and demonstrate your personal brand**

Join us on a curated journey to help you harness the unique ingredients that make up your personal brand. In this session you will identify your WOW factor, find your NORTH STAR, explore your PASSIONS, and translate these into a POWERFUL and ENGAGING personal brand. Expect to do a lot of self-reflection and take home your polished elevator pitch and personalized description for your LinkedIn profile.

Workshop leaders: Rebecca Taylor, Equabli and Lauren Valenzuela, TrueAccord

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Choice 2 **Pave Your Own Path: Increase the Odds of Success For Yourself and Your Organization**

Please join us for an interactive workshop about paving your own path and creating success within you and your organization. End your week at WCF on a high note and walk away with tips and strategies to move your career and your organization ahead of the curve.

Workshop leaders: Cynthia Brooks, Galaxy Capital Acquisitions and Poorani Jeyasekar, Klaros Group

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Choice 3 **Write Your Next Chapter**

Do you have more of your career behind you than ahead? Or are you at a place in your life or career where you're contemplating a change? If you find yourself thinking about the mark you've made and considering what you still want to accomplish; whether you've got your eye on a big career move, you're ready to sit on a board(s), you're looking to engage in philanthropy, or you're just ready for your heard-earned retirement, we'll help each other clarify our dreams, and chart the path forward.

Workshop leaders: Tracy Basinger, ex-Federal Reserve Bank of San Francisco and Terry Schwakopf, Deloitte

Networking

December 6 @ 3:45 PM

Past attendees have told us they'd like the opportunity for structured networking. So we pulled a committee together to think about how to accomplish this with the signature Women in Consumer Finance touch.

For those who want to network beyond your assigned team, this is your chance to meet approx. 6-8 new people. If you have an ask (i.e. I'm looking for a new supplier, I'm looking for a new team member, etc.), put it out there. You never know who knows the right person and can make an impactful introduction.

If you've ever participated in "speed networking" and found it hard to hear or difficult to keep track of all of the people you met in a short period of time, this session is designed for you. We've reimaged how to keep what's good about this activity and make it more enjoyable, practical, and useful.

