



Diverse Perspectives, Stronger Outcomes: Elevating DE&I in Financial Services

NOVEMBER 27, 2024



PANELISTS



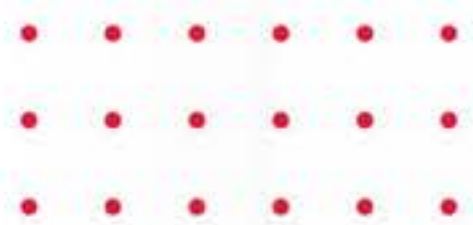
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As DE&I efforts take center stage, are investor and shareholder expectations shifting?

How is the financial services industry evolving to meet these changing demands?





Evolving Shareholder Perspectives



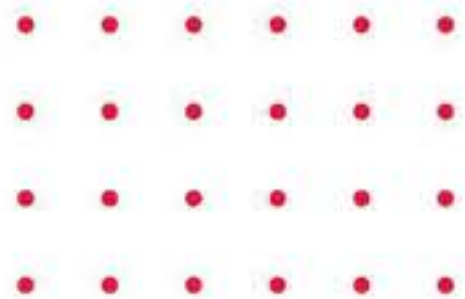
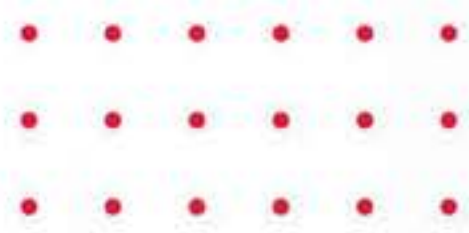
Increased Transparency & Standards



Concerns About Socialwashing



Navigating Complex Dynamics





Leading with Purpose



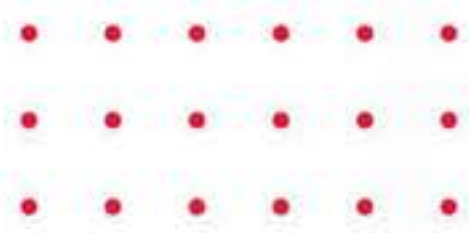
Formalizing Reporting & Governance

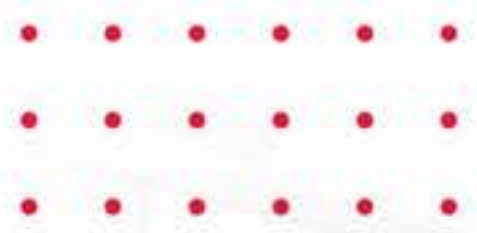


Employee-Centric Approaches



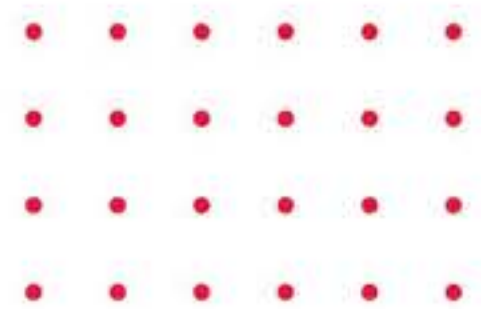
Importance of Ongoing Education





Do DE&I initiatives impact employee performance and engagement?

How can financial institutions foster inclusion to boost employee performance, engagement, and career growth in a supportive and empowering environment?





Using Data to Drive
DE&I Decisions



Balancing Outcome
and Process Metrics



Elevating the Role
of ERGs



Building a Culture of
Allyship





Highlighting Efforts
Through Disclosure



Innovating with
Inclusion Metrics

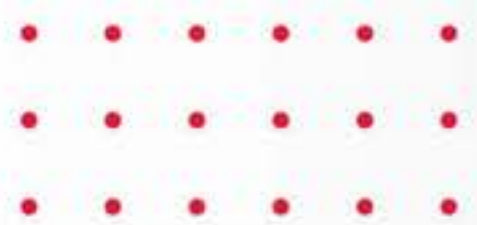


Addressing Systemic
Inequities

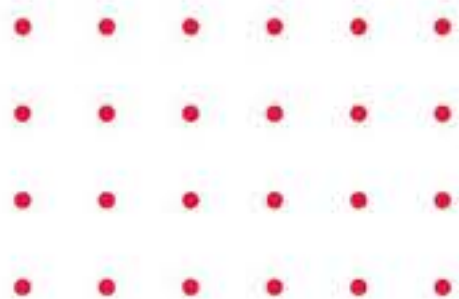


Balancing Risks and
Benefits of AI in DE&I





Are there any strategies or frameworks advisors can use to bolster inclusion efforts within their practice and support broader DE&I goals?





Staying attuned to changing global expectations



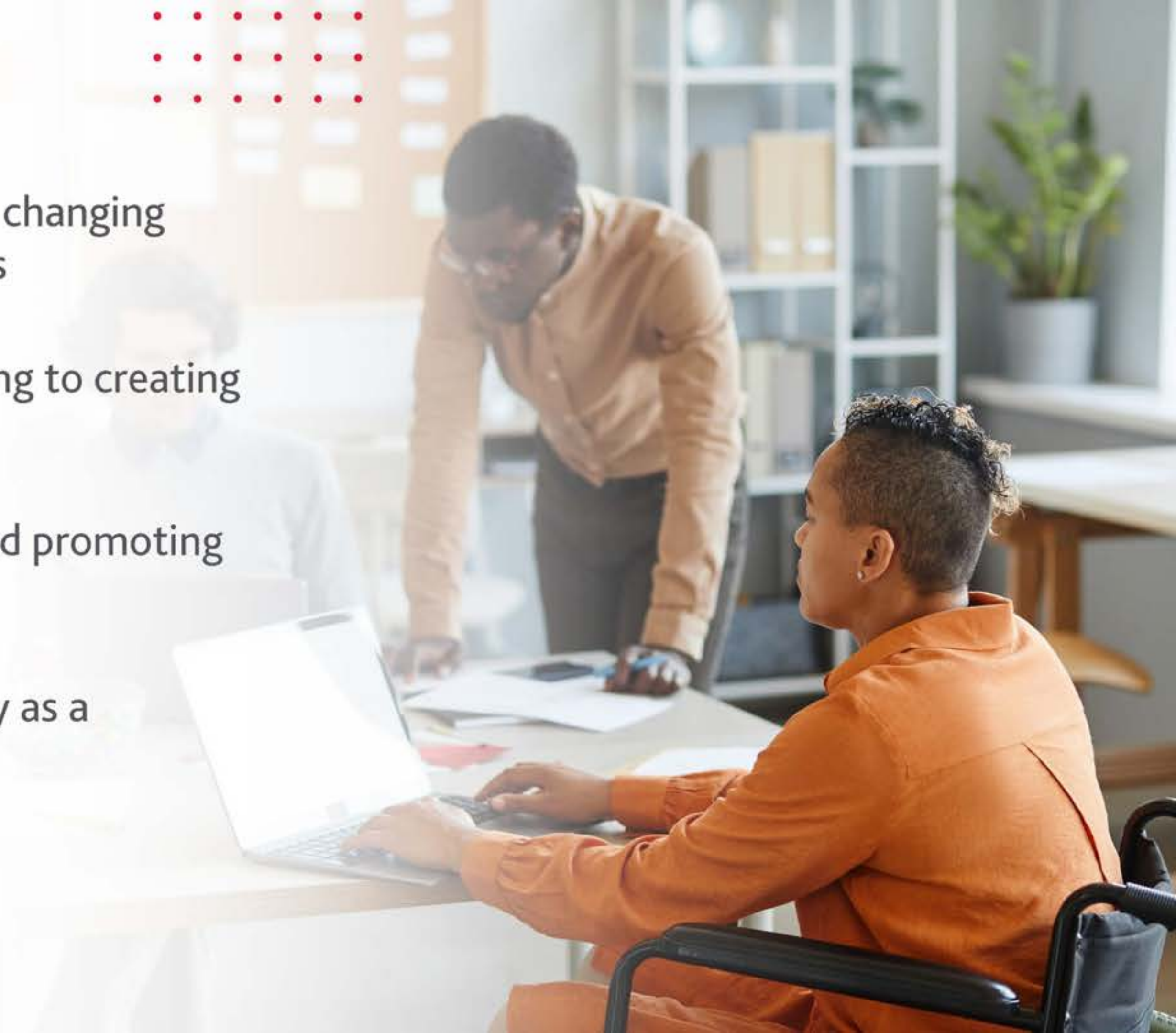
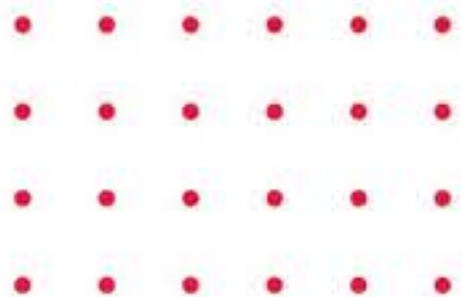
Actively contributing to creating inclusive teams



Challenging bias and promoting objectivity



Fostering inclusivity as a core value





Adopting DE&I as a primary function



Assessing current practices with Equity Reviews



Leveraging data as a foundation for action



Approaching DE&I with an open mind



Q & A



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