

## FUTURE OF WOMAN & FINANCE

**Date:** October 27th, 2015

**Venue:** Madrid Stock Exchange  
Plaza de la Lealtad, 1, 28014 Madrid  
Conference Room: Antonio Maura  
Coffee Break & Cocktail: Salón de Pasos Perdidos

**Time:** 18:00 pm-21:15 pm

CFA Society Spain and CFA Institute share the objective to develop and encourage the career growth and promote the women leadership in the investment business. This conference will be an opportunity to see a bigger scope of women's position in this industry, the diversity advantages for the companies this can bring and the strategies that can be helpful in different stages of their professional growth. The event will be a meeting point between our partners, investment professionals and experts and will serve to discuss various important aspects of the role of women in finance and in the corporate world.

We have gathered first class speakers (national and international) willing to share their own experiences. These women have become company leaders changing cultures and the way to connect with their employees, colleagues and clients.

### **Who should attend the event?**

This event is aimed at all those investment professionals who are in a transition period of their working lives, or those looking to recruit the best talent and apply best practices in diversity.

### **Partnerships and sponsorships**

BME.

### **Agenda**

**18:00-18:30** Registration

**18:30-18:45** Session Opening:

- Javier Borrachero, CFA, President CFA Society Spain

**18:45-19:15** Key findings of the study: "Rich Thinking 2015: Future of Women & Finance"

- Barbara Stewart, CFA, Partner, Cumberland Wealth Management

**19:15-19:45 Credit Suisse Research Institute study: “The CS 3000 Gender, Woman in senior management”**

- Julia Dawson, Managing Director of Credit Suisse in the Investment Banking Division, based in London

**19:45 – 20:00 Morningstar Study: Women in the international and Spanish investments sector**

- Mónica Muñoz Álvarez, Sales Director for Spain, Morningstar

**20:00-20:15 Coffee Break & Networking**

**20:15-21:00 Roundtable: Women’s Leadership in Finance**

- Speakers (CFA women in leadership positions):
  - Beatriz Alonso-Majagranzas, Deputy Head of Equity at BME
  - Mónica Valladares, General Secretary, Invercaixa Gestion S.G.I.I.C. S.A.U.
  - Belén Blanco Jérez, CFA, Head of Quality Funds, BBVA.

**21:55- 21:15 Closing: CFA Institute’s Vision about the Role of Women in Finance**

- Ainhoa Diez-Caballero CFA, Vicepresident CFA Society Spain

**21:15 Cocktail & Networking**

## **Biografías**

### **Barbara Stewart, CFA, Partner, Cumberland Wealth Management**

Barbara Stewart, CFA; is a Partner and Portfolio Manager at Cumberland Private Wealth Management, where she works with high net worth investors, both individuals and families. Barbara is also a researcher and writer on issues around women and financial literacy, and published the fifth installment of her Rich Thinking series on International Women's Day in March, 2015.

As part of her work on issues of interest to women, Barbara has a bi-weekly newspaper column on women and money in over 30 newspapers across Canada, reaching over 2 million Canadians in all major markets. She is the Money contributor and columnist for Mrs. R online magazine, whose primary audience is successful women over 40 worldwide. Barbara is a frequent interview guest on TV, radio and print, both financial and general interest. Finally, she is a sought after keynote speaker at global events relating to women, money and financial literacy, and has participated in events in Istanbul, Toronto, Helsinki, Stockholm, Reykjavik, Luxembourg, Paris and Singapore; to both broader conferences and at corporate functions.

### **Julia Dawson, Credit Suisse Managing Director in the Investment Banking Division**

Julia Dawson is a Managing Director of Credit Suisse in the Investment Banking Division, based in London. She's is a member of the Equity Research Department and responsible for Environmental, Social and Governance (ESG) and Thematic Research.

Ms. Dawson joined Credit Suisse in April 2014 through the Real Returns program. Previously, she was Head of International Equity Sales at Alfa Bank (Russia) between 2008 and 2010. Prior to that, she worked at Deutsche Bank for six years where she was a Managing Director and Head of Emerging European equity sales. She began her career at Barings Securities in equity research and was Head of Russian Research from 1994 to 1999.

Ms. Dawson holds a B. Sc. (Econ) degree in Economics and Russian Studies from the London School of Economics and MBA from INSEAD.

### **Mónica Muñoz, Sales Director Morningstar.**

Monica is Sales Director of Morningstar since May 2012.

Managing relationships with a large installed base of clients across Spain and Portugal with global expansion.

Responsible for Strategic partnership, oversight of all products, contract negotiation and solutions selling.

In the past she has worked as sales Specialist in Thomson Reuters promoting an extended list of products for banks and corporates including valuation Services for derivatives, ABSs, data feeds, consultancy and

Professional Services. And in Lead generation, monitoring and Implementation of complex sales, providing tailored solutions for client's needs.

### **Beatriz Alonso-Majagranzas Cenamor, Deputy Head of Equity, BME**

Beatriz is the Deputy Head of Equity in the Madrid Stock Exchange. She is the supervisor of the daily transactions in the equity market, the responsible for the development and functionality of the equity platform transactions as well as the adaptation of these to the new products that are incorporated to the Spanish market.

She has a Master Degree in Banking and Finance by the International Financial Analysts (AFI) and a Bachelor Degree in Economics in the Universidad Autónoma de Madrid.

### **Mónica Valladares Martínez, General Secretary, Invercaixa Gestion S.G.I.I.C. S.A.U.**

Currently she is the IICs General Secretary at Invercaixa ("La Caixa" group), where she has been working since 2006 and has been member of the management committee from the beginning.

The Accountant Secretary department has been formed since 2013 by the legal consultant department, the compliance department and the prevention of money laundering and terrorism funding department. In 2010 she worked as the legal consultant and between 2006 and 2010 in compliance.

Previously, in BBVA she was the Credit Risk Director and she has developed different rolls in the finance sector since 1998.

She has been collaborating for over 6 years as a speaker and coordinator in specialized courses at IICs in Financial Mind (an on line finance organization).

She has a telecommunication engineer degree from the ETSIIyT in Bilbao (UPV), a master in finance with a specialization in markets in the BBVA Finance School (Oct 98- May 00) and obtained the CFA certification (Chartered Financial Analyst) (2001), FRM (Financial Risk Manager) (2003) and PRM (Professional Risk Manager) (2004).

### **Belén Blanco Jérez, CFA, Head of Quality Funds, BBVA.**

Belén Blanco Jerez is Head of Quality Funds, the Guided Architecture platform of the BBVA Group, and with her 20 years of experience, she is responsible for the analysis and selection of third-party funds, working very closely with BBVA networks and investment teams to provide them with specialized support in relation to these products as well as to QF&BBVAAM Multimanager Funds.

Ms Blanco joined BBVA in 1995 and has spent all her professional career in the Group where she has held various different positions that have provided her with a solid knowledge of the asset management business. First, she started as an auditor in the Treasury and Capital Markets International Department from where she moved on to become a Risk Manager in the Private Banking Unit. After that, she worked

as fund manager for more than 10 years becoming the Head of the Credit and Fixed Income Team and then being promoted to Head of Innovation and Product Development Department.

Ms. Blanco earned a JD degree in Law and a BA in Economics from the Universidad Pontificia de Comillas in 1994, a Master in High European Studies from the College of Europe (Brugge, Belgium) in 1995 and an Executive Master in Quantitative Finance from AFI (Madrid) in 2006. Belén has also being a CFA Charterholder since 2003.