







Actions, not just words

For decades Prudential has been committed to racial equity and social justice. Now we're stepping up our game.

By taking further action for inclusion and diversity.

FOR OUR PEOPLE: Our goal is to be the professional home to the top talent in our industry by building a culture where every voice is heard.

THROUGH OUR BUSINESS: Our enterprise inclusion strategy is expanding accessibility of our offerings to a diverse range of people and communities.

IN SOCIETY: We're eliminating barriers and creating more equitable systems that lead to better outcomes for families and communities.

Learn more about our commitments at Prudential.com/Purpose

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The 2022 Summer Executive Workshop

n behalf of The Beta lota Boule of Sigma Pi Phi Fraternity, Inc., and in partnership with McKinsey & Company and The Executive Leadership Council, we are excited to welcome you to the 2023 Summer Executive Workshop Series - The 6th Annual Black Economic Forum. To all of our Sponsors- THANK YOU! We sincerely appreciate your unwavering support to make this event a success over the past 12 years.

The Black Economic Forum will convene Black corporate executives, philanthropists, scholars and more to provide opportunities to network, ideate and collaborate on efforts to advance Black economic development while also raising funds to benefit several charitable causes.

This year's event will focus on a future-oriented approach to advance Black economic mobility, reflecting on the progress that has been made as well as the challenges that are ahead. During the Forum, participants will hear from industry leaders and experts on various topics including the impact of climate change on Black communities, equity through technology, and public/private investments in Black economic mobility.

We are extremely excited to have a cohort of exceptional leaders on this year's program, including our featured keynote speakers Marc H. Morial and Michael S. Regan. Marc Morial, the President and CEO of the National Urban League and former Mayor of New Orleans, is a leading voice on the national stage for Black economic mobility with a focus on the urgency of this moment in the battle for change. Michael Regan serves as the Administrator of the United States Environmental Protection Agency, the first Black man and second person of color to lead the agency, and brings a staunch commitment to environmental justice to the role.

It is our sincere hope that you will be inspired by these relevant, thought provoking, and educational sessions. The event is purposely designed to empower you to lean in and engage, learn and take action to drive meaningful change within your respective companies and communities.

Thank you for joining us and enjoy your time here on Martha's Vineyard!

Marm regards. 2023 Planning Committee

Dennis Alexander

Operations Coordinator McKinsey & Company

Khalilah Branch

Senior Program Manager Membership and Events The Executive Leadership Council

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Lori Walker

Executive Vice President & Chief Operating Officer
The Executive Leadership Council

Dennis R. Williams

General Manager Financial Services -Northeast Avanade (an Accenture & Microsoft company)

Lori Williams

Practice Hub Manager, Tampa McKinsey & Company

Summer Executive Workshop 2023 Martha's Vineyard • August 22-24

Wednesday, August 23, 2023

11:00am - 11:20am
Opening Session

11:20 - 11:30 Economic Mobility scorecard

11:30am - 1:00pm

Technology as a Driver of Black Economic Mobility:

Harnessing the power of GenAl, Black tech talent, and inclusive tech to build up Black communities and close the digital divide

1:00pm - 2:00pm Lunch & Networking

2:00pm - 3:45pm

Climate Risk and Opportunities through Green Transition:

Physical and transitional risks of climate change on Black communities

7:00pm - 10:00pm

Reception Dinner and Keynote Speaker:

Marc H. Morial

Thursday, August 24, 2023

9:00am - 9:45am

Updates from Initiative Leaders Across the BEF Community:

Learn from the bold initiatives and programs our leaders have launched across their companies and organizations

9:45am - 11:15am

Private Investments in Economic Mobility:

A guide to investing in Black economic mobility; where to invest for equity

11:15am - 12:15pm Keynote Speaker

Fireside chat with Michael S. Regan and Jahi Wise

12:15pm - 12:30pm Recap and close Black Economic Forum

AUG 23RD KEYNOTE Marc H. Morial Former Mayor of New Orleans

Marc Morial is the transformative President and CEO of the National Urban League, the nation's largest historic civil rights and urban advocacy organization. He served as the highly successful and popular Mayor of New Orleans as well as the President of the U.S. Conference of Mayors. Marc previously was a



Louisiana State Senator and was a lawyer in New Orleans with an active, high-profile practice.

A graduate of Georgetown University Law Center, and the University of Pennsylvania with a degree in Economics and African American Studies, he has been recognized as one of the 100 most influential Black Americans by Ebony Magazine, one of the top 50 Non-Profit Leaders by the Non-Profit Times, one of the 100 Most Influential Black Lawyers in America and he has also been inducted into the International Civil Rights Walk of Fame in Atlanta, GA.

He is a leading voice on the national stage in the battle for jobs, education, housing, health, voting rights, equity, and entrepreneurship.

AUG 24TH KEYNOTE Michael S Regan Administrator of the U.S. Environmental Protection Agency

Michael S. Regan was sworn in as the 16th Administrator of the United States Environmental Protection Agency on March 11, 2021, becoming the first Black man and second person of color to lead the U.S. EPA. Administrator Regan is a native



of Goldsboro, North Carolina, where he developed a passion for the environment while hunting and fishing with his father and grandfather, and exploring the vast lands, waters, and inner Coastal Plain of North Carolina.

As the son of two public servants - his mother, a nurse for nearly 30 years, and his father, a retired Colonel with the North Carolina National Guard, Vietnam veteran, and former agricultural extension agent - Michael Regan went on to follow in his parents' footsteps and pursue a life of public service.

Prior to his nomination as EPA Administrator, Michael Regan served as the Secretary of the North Carolina Department of Environmental Quality (DEQ).

Tameka Alsop Chief Administrative Officer, Moody's

Tameka Alsop is Chief Administrative Officer at Moody's Corporation and a member of the Executive Leadership Team. In this role, Ms. Alsop leads a range of strategic and operational initiatives that are vital to the company's success. This includes leadership of the company's global enterprise technology team.



Ms. Alsop has more than 20 years of experience helping drive positive change and business results at Moody's. Previously, Ms. Alsop was Managing Director, Head of US Financial Institutions Relationship Management at Moody's Investors Service, where she built customer relationships with institutions to grow coverage and revenue, as well as expanded relationships with existing issuers and intermediaries. She also held various leadership positions across the organization including roles in Business Process Management and Ratings Operations, Investor Relations, Structured Finance Surveillance, Public Finance, Business Planning and Revenue Accounting.

Ms. Alsop currently serves on the Trident American Dreams Advisory Board, she is a founding member of the Women's Business Resource Group at Moody's, and she's the current global executive sponsor for Moody's Veterans Business Resource Group. She is also a key contributor to various diversity, equity and inclusion initiatives at the company - this includes serving as executive sponsor for Moody's CORE (Creating Opportunities for Racial Equity) initiative.

Ms. Alsop holds a B.A. from Pennsylvania State University and is a certified project management professional.

April Miller Boise Executive VP, Chief Legal Officer, Intel

April Miller Boise is executive vice president and chief legal officer at Intel Corporation. She leads Intel's global legal, trade and government affairs team, is a member of the executive leadership team and a strategic adviser to the company and the board of directors.



Prior to joining Intel in July 2022, Miller Boise was executive vice president and chief legal officer at Eaton Corp. Before joining Eaton in 2020, she served as senior vice president, chief legal officer and corporate secretary for Meritor Inc. Miller Boise has more than 25 years' experience and has served in executive leadership roles including chief legal officer,

general counsel, and head of global mergers and acquisitions. Earlier in her career, Miller Boise practiced on Wall Street and later led the largest office of an AmLaw 200 law firm as managing partner and was a member of the firm's executive committee. She has worked with companies across industries including aerospace, electrical products and services, financial services, commercial transportation, automotive, mining, and oil and gas.

Miller Boise holds a Juris Doctor from the University of Chicago Law School and a Bachelor of Business Administration from the University of Michigan Business School. She is a member of the board of directors of Trane Technologies.

Jahi Wise

Acting Director Greenhouse Gas Reduction Fund, U.S. Environmental Protection Agency

Jahi Wise is the Acting Director for the Greenhouse Gas Reduction Fund. He joined EPA from the White House Climate Policy Office where he previously served as Special Assistant to the President for Climate Policy and Finance. In this role, Jahi has been the principal advisor to National Climate Advisors Gina



McCarthy and Ali Zaidi developing and leading the implementation of the Biden-Harris Administration's policies on clean energy project finance, economic development, climate-related financial risk and equitable climate investment.

Prior to joining the Administration in January 2021, Jahi held climate policy positions in the Office of the Mayor of New York City and at a national nonprofit focused on establishing and clean energy finance entities. Jahi also practiced law as an energy and infrastructure project finance attorney and as general counsel of a social enterprise focused on community scale clean energy deployment.

He received his J.D. and MBA from Yale Law School and Yale School of Management and his B.A. from Morehouse College

Darrin Williams CEO, Southern Bancorp

Darrin L. Williams is the CEO of Southern Bancorp, Inc., one of America's oldest and largest community development financial institutions (CDFIs) working to expand economic opportunity in rural and minority communities throughout the mid-South that are increasingly abandoned by other financial institutions.



SPEAKERS

With more than \$2.5 billion in assets, 56 locations around and throughout the Delta region, one of the nation's most impoverished communities, Southern Bancorp focuses on the net worth building strategies of homeownership, entrepreneurship and saving.

A frequent commentator in the national press, Williams is a former legislator, securities and consumer protection attorney and passionate advocate for financial inclusion who is recognized nationally for his work to increase financial access. Darrin is a recent addition to Business Insider's 100 People Transforming Business as well as a past member of the Bloomberg 50, an annual list of individuals who defined global business for the year. Williams is active in many organizations including serving as board chairman of the Community Development Bankers Association; the North American board representative to the Global Alliance for Banking on Values: a board member of the St. Louis Federal Reserve's Little Rock Branch, and a Biden Harris appointee to the CDFI Fund Community Development Advisory Board. Williams received his Bachelor of Arts degree from Hendrix College in Conway, Ark.; his Juris Doctor from Vanderbilt University School of Law in Nashville, Tenn.; and his Master of Laws degree in Securities and Financial Regulation from Georgetown University Law Center in Washington, D.C.

Lo Toney Founding Managing Partner, Plexo Capital

Lo is the Founding Managing Partner of Plexo Capital, which he incubated and spun out from GV (Google Ventures), based on a strategy to increase access to early-stage deal flow. Plexo Capital invests in emerging seed-stage VCs (led by diverse managers) and invests directly into companies sourced from the



portfolios of VCs where Plexo Capital has an investment. Investors in Plexo Capital funds include Alphabet/Google, Intel Capital, Cisco Investments, the Royal Bank of Canada, Southern New Hampshire University, the Home Depot, Hearst Corporation, the Hampton University Endowment, JIMCO + the Ford Foundation.

His expertise includes investing into areas such as enterprise infrastructure, cybersecurity, financial technology, marketplaces, e-commerce, gaming + technology enabled consumer. In addition to managing Plexo Capital, Lo is a CNBC Contributor providing his expertise on financial markets and technology companies on a regular basis.

Prior to founding Plexo Capital, Lo was a Partner on the investing team at GV, where he focused on marketplaces, mobile, and consumer products.

Before GV, Lo was a Partner with Comcast Ventures, leading the Catalyst Fund and worked with the main fund focusing on mobile messaging marketplaces.

He also worked with Zynga as the GM of Zynga Poker with full P+L responsibility For Zynga's largest franchise at the time. During his leadership, bookings increased by over 150% to \$250M with margin expansion. Lo has also held executive roles with Nike + eBay. Lo received his M.B.A from the Haas School of Business (University of California at Berkeley), where he completed the Management of Technology program, a joint curriculum program with the College of Engineering. Lo received his B.S from Hampton University in Virginia.

Derrick WeatherspoonSenior Portfolio Manager, BlackRock Alternative Investors

Derrick Weatherspoon is a Senior Portfolio Manager for the BlackRock Impact Opportunities (BIO) Fund. BIO is a \$1 billion+ return-seeking investment platform that takes a dynamic approach to addressing the issue of racial inequity through direct investments



across alternative asset classes - Private Equity, Private Credit, Real Assets, and other niche private markets strategies. He joined BlackRock in 2021. Prior to joining BlackRock, Derrick served as a Managing Director at IMB Partners, a middle-market private equity firm focused on investments in the utility services and government agency services sectors.

At IMB, he led the firm's deal management function in which he was responsible for sourcing, financing and executing investment opportunities as well as monitoring portfolio companies. Prior to IMB, Derrick was a Vice President at The Carlyle Group within in its U.S. Buyout Fund. At Carlyle, Derrick sourced, executed and monitored large-scale leveraged buyout and growth equity investments in the consumer, media and retail sectors. Prior to Carlyle, Derrick worked at Welsh, Carson, Anderson & Stowe, a private equity firm focused on investing in growth-oriented companies in the healthcare and technology sectors. Derrick began his career at Lehman Brothers, where he was an Investment Banking Analyst in the Financial Sponsors Group.

Derrick currently serves on the Board of Directors for MACRO Media, LLC and Tricolor Holdings, LLC. Derrick received a B.S. in Finance from the University of Maryland's Robert H. Smith School of Business and an MBA from Harvard Business School, where he was a Robert Toigo Fellow.

W. Dave Dowrich Senior Executive Vice President and Chief Financial Officer, TIAA

Dave Dowrich is Senior Executive Vice President and Chief Financial Officer of TIAA, where he has responsibility for TIAA's financial management and planning, actuarial, tax, accounting and financial reporting functions for the organization.



Dave joined TIAA from Prudential where he held a similar role for Prudential Financial's International Businesses, based in Tokyo, Japan. Prior to Prudential, he worked at AIG as Chief Executive Officer, International Life and Retirement, with oversight of AIG Life (UK), Laya Healthcare (Ireland) and leading the Life and Retirement division's international strategy and growth. He previously served as CFO of AIG Japan and Asia Pacific and as CFO and Chief Financial Actuary of Institutional Markets in the USA. Prior to joining AIG, Dave held senior roles in investment banking at Goldman Sachs and Credit Suisse, as well as reinsurance and transaction structuring roles at Swiss Re and Canada Life Reinsurance. Dave began his career as a pension consulting actuary in Toronto, Ontario.

Dave earned an MBA in Finance from the Wharton School of the University of Pennsylvania and a BSc in Actuarial Science and Applied Statistics from the University of Toronto. He is a Fellow of the Society of Actuaries, an Associate of the Canadian Institute of Actuaries and a Member of the American Academy of Actuaries. Dave is on the board of Scotiabank and Vantage Group Holdings Ltd, has served on several insurance and non-insurance operating and holding company boards, and currently serves on the boards of non-profit and academic organizations.

In July 2022, Dave was named one of the "2022 Most Influential Black Executives in Corporate America".

Aron BetruSenior Executive Vice President and Chief Financial Officer, TIAA

Aron Betru is the Chief Strategic Officer and Chief Operating Officer at Trident. Mr. Betru leads the Strategy & Operations Team, which includes post investment value creation and social impact initiatives for Trident and portfolio companies. Mr. Betru is also a member of Trident's Investment Committee and its



Executive Committee. Mr. Betru has more than 20 years of financial sector, strategic consulting, and social impact experience.

Prior to Trident, Mr. Betru was the Managing Director of the Milken Institute's Center for Financial Markets, leading a financial markets public policy team with a focus on financial innovations for social good. Mr. Betru was a member of the steering group for the Blended Finance TaskForce launched by the Business & Sustainable Development Commission as well as Co-Chaired the Partnership for Lending in Underserved Markets, a joint initiative with the U.S. Small Business Administration.

Prior to the Milken Institute, Mr. Betru was the Co-Founder and Chief Executive Officer at Financing For Development, specializing in innovative financing solutions for international development. Mr. Betru's extensive experience includes economic development roles at the United Nations Foundation, TechnoServe and Dalberg Global Development Advisors as well as private sector experience at McKinsey & Co. and Goldman Sachs. Mr. Betru is a member of Board of Directors for Calvert Impact Capital, National Bankers Community Alliance, African Leaders Malaria Alliance, and FHI Foundation, as well as an Senior Advisor to Milken Institute, Amazon's Black Business Accelerator, and Wells Fargo MDI Investment Committee. He holds an MBA from Columbia University, an MA from Johns Hopkins SAIS, and a BA in Economics and International Studies from Northwestern University.

Cindy PaceVice President, Global Chief Diversity and Inclusion Officer, MetLife

Dr. Cindy Pace is Vice President, Global Chief Diversity, Equity and Inclusion Officer at MetLife. In this role, Dr Pace leads the global DEI strategy for the enterprise with more than 50,000 employees across the world. Aligned to the company's business imperative, the strategy drives and promotes DEI as critical success



factors to fuel innovation, cross-cultural collaboration and business success. Under her leadership, the ongoing progress made on DEI at MetLife has been recognized by Great Place to Work, UN Women, UN Global Compact, McKinsey and Lean In, Seramount, HRC, Disability:IN, HACR, Bloomberg Gender Equality Index. Dr. Pace is the executive producer and host of the MetLife sponsored Inclusion Begins with Me: Conversations that Matter podcast ranked in the Top 250 business and management podcast on Apple and Top 5% of podcast by Listen Score. The podcast examines the pivotal role people play in creating inclusive workplaces.

Dr. Pace more than 20 years of professional experience including holding global corporate management and leadership roles financial services, healthcare, and biopharmaceutical corporations. She is a leadership scholar practitioner leading authority on the intersections

of diversity, leadership, and power. She is known for her expertise in advancing women and BIPOC talent into top leadership roles. She is also lectures, moderates, and speaks providing thought leadership at global conferences and academic institutions including Columbia University and Columbia Global Center - Rio de Janeiro where she is an adjunct faculty. Her business perspectives and research insights have been featured in Financial Times, Forbes, Harvard Business Review, HBR Ascend, Brit & Co, TED + Brightline, Fortune Magazine and the books You, the Leader (HBR Women at Work Series) and Women's Leadership Journeys: Stories, Research, and Novel Perspectives.

She is a board member of the International Leadership Association, National Advisory Committee on the Carnegie Classification in Leadership for Public Purpose, and a member of the Harvard Kennedy School's Women's Leadership Board supporting the Women and Public Policy Program. Dr. Pace has been recognized as one of the Elite 100 Black Women Executives Changing the Face of Corporate America by Diversity Woman Media, was profiled as a Woman Worth Watching by Diversity Journal and received the Red Shoe Leader Award. She is a passionate advocate of personal leadership development, racial and gender equity, women's economic and financial empowerment, forest preservation and restoration.

Salene Hitchcock-Gear
President
Prudential Individual Life Insurance

Salene Hitchcock-Gear is president of Prudential Individual Life Insurance. Prudential Individual Life Insurance is a business unit of Prudential (NYSE:PRU) that offers competitive solutions to meet the needs of consumers through the manufacturing and distribution of a diverse portfolio of life insurance products.



An insurance industry veteran with more than 30 years of experience, Hitchcock-Gear joined Prudential in 2017 as chief operating officer of Prudential Advisors, the Company's national sales organization with more than 3,000 financial professionals, advisors and fee-based financial planners who offer clients a broad range of financial solutions. She was appointed president of both businesses in 2018.

Previously, Hitchcock-Gear served as president and CEO of Ameritas Investment Corp. and president and CEO of Acacia Life Insurance Company. Hitchcock-Gear represents Prudential as a director on the Women Presidents' Organization Advisory Board. She also serves on the board of trustees of the American College of Financial Services and is on

the Life Insurance Committee of the American Council of Life Insurers. She also serves as the executive sponsor for the Women Empowered employee affinity group at Prudential.

Hitchcock-Gear holds a bachelor's degree from the University of Michigan, a Juris Doctor degree from New York University School of Law, as well as FINRA Series 7 and 24 securities licenses. She is a member of the New York State Bar Association. She also is a board member of the University of Michigan Alumni Association.

Lata N. Reddy
Senior Vice President of Inclusive Solutions,
Prudential Financial; Chair, The Prudential Foundation

Lata N. Reddy is a senior vice president, Inclusive Solutions, and chair of The Prudential Foundation. In these roles, Reddy harnesses the power of capital markets to drive financial and social mobility. By combining diversity strategies, impact investments,



philanthropy, corporate contributions and employee engagement with Prudential's full business capabilities, she helps position the company to promote inclusive economic opportunity and sustainable growth.

Under Reddy's leadership, Prudential became one of the first institutional investors to grow and manage an impact investing portfolio with \$1 billion in assets under management. Additionally, she oversees a yearly grant-making budget of over \$40 million through The Prudential Foundation, and a \$17 million corporate contributions budget.

Reddy originally joined Prudential in 1997. Prior to joining Prudential, she was a civil rights attorney with the U.S. Department of Education. Her dedication to promoting equity has spanned her career in the nonprofit, public and private sectors.

In addition to serving as chair of both The Prudential Foundation and the Newark Alliance, Reddy serves on the boards of several local and national organizations, including Alvin Ailey Dance Foundation, the advisory board for the My Brother's Keeper Alliance - a program of the Obama Foundation - and UNICEF USA's National Board of Directors. She's also a member of the Aspen Global Leaders Network. In response to the COVID-19 pandemic, Reddy was named by Newark Mayor Ras J. Baraka's Newark Reopening and Recovery Strikeforce in 2020, leading the Economic Recovery Committee.

Reddy holds a Bachelor of Arts degree in economics from the University of Michigan and a law degree from Emory University School of Law.

PHOTO GALLERY

























PHOTO GALLERY







Our Sustainability Commitments

Our global Diversity, Equity, and Inclusion efforts begin with our purpose — Always with you, building a more confident future. This purpose guides our actions and commitments.

To learn more about our path forward, visit: www.metlife.com/DEl

Investments

Originate \$1 billion in investments that advance firms owned by women, minorities, and disabled persons.

Workforce Diversity

Continue to advance workforce diversity by consistently achieving top quartile positioning across each ethnically and racially diverse category in the U.S. and of female officers globally. Enhance transparency of the link between top quartile positioning and executive leadership performace.

Solutions and Insights

Provide solutions and insights to address the needs of the underserved.

Diverse Suppliers

Reach \$5 billion in spend with diverse suppliers and annually report the economic impact.

MetLife Foundation Funding

MetLife Foundation has committed \$150 million in fuding to support underserved and underrepresented communities.

Research

MetLife

Support research that advances understanding of DEI issues.

Volunteer Hours

Commit 800,000 employee volunteer hours with a focus on DEI/underserved communities.

Creating Opportunities for Racial Equity

Moody's is a global integrated risk assessment firm empowering organizations to make better decisions through our credit ratings, research analysis, insights and analytical tools for risk measurement. We believe that greater transparency, more informed decisions, and fair access to information open the door to shared progress.

Introducing Moody's Creating Opportunities for Racial Equity (CORE) - evolving the way we engage, empower and invest in our community.



ENGAGE more diverse businesses by broadening CORE's outreach inside and outside of Moody's



EMPOWER diverse businesses with information, data and insights to grow and scale



INVEST to provide more access to, and understanding of how diverse businesses can leverage, capital

Want to learn more about CORE? Visit us at core.moodys.io

Moody's | core

Visit us at **moodys.com** and learn what makes Moody's essential for market participants around the world.





Supporting Sponsors









Advancing equity. Promoting Black leadership.



COLLINS AEROSPACE | PRATT & WHITNEY | RAYTHEON

We champion Black talent at every level. And we're using advocacy, supplier diversity and community efforts to drive a more equitable future for all. Learn more about our diversity and inclusion efforts at rtx.com/diversity

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The Summer Executive Workshop

series provides professional development and networking opportunities for young and seasoned professionals, senior executives, and board members.

We have been able to contribute over \$200,000 to organizations including the Hospice for St. Joseph in Haiti, the Hartford Foundation for Public Giving, the African American Heritage Trail of Martha's Vineyard, the Amistad Center for Art & Culture, Martha's Vineyard Hospital in support of indigent care for native and minority populations, and providing scholarships for deserving young people pursuing higher education.



Sigma Pi Phi Fraternity or "The Boulé"

Modeling leadership, education and civic responsibilty by supporting civic endeavors and by mentoring the young men who will advance the African American community in all facets of equality, mutual respect and devotion to democratic traditions.