

CFA Institute Workshop Series: Diversity and Inclusion in the Investment Management Profession



Rebecca Fender

Head, Future of Finance, CFA Institute

Rebecca Fender, CFA, is head of the Future of Finance initiative, the thought leadership platform for CFA Institute. As part of the industry research group, her team works with industry partners, academics, and a volunteer network to produce studies to help shape a trustworthy, forward-thinking investment profession that better serves society.

Recent publications include: *Investment Firm of the Future*; *Driving Change: Diversity & Inclusion in Investment Management*; *Uncertain Futures: 7 Myths about Millennials and Investing*; and *The Next Generation of Investor Trust*. Fender is also the co-leader of the CFA Institute Women in Investment Management initiative. She speaks regularly at industry events and has appeared in media outlets such as the *Financial Times*, *Bloomberg*, and the *New York Times*.

Prior to joining CFA Institute, Rebecca was a vice president at BlackRock working with pension funds and endowments, and she also worked at Cambridge Associates, where she published research about manager selection. She earned her undergraduate degree in economics from Princeton University and holds an MBA from the Darden School at the University of Virginia. Previously, Fender also served as the director of the flagship CFA Institute Annual Conference.

CFA Institute Workshop Series: Diversity and Inclusion in the Investment Management Profession



Dr. Kelli Palmer Ph.D.

Head, Global Diversity and Inclusion and Corporate Citizenship, CFA Institute

A therapist by training, Dr. Kelli Palmer has a doctorate in university administration and higher education. As the director of corporate citizenship for CFA Institute she's charged with helping the organization define and execute its rights and responsibilities as they relate to society.

Since CFA Institute is the fifth largest private employer in Charlottesville, Va., Palmer has been involved with many of the local efforts to help the community heal after the protests there in the summer of 2017, and she has also played a key role in the formation of a diversity and inclusion committee for our organization.

Her scholarship is on diversity, inclusion, and promotion in the workplace.