

Re-envision DEI: Progress and the Promise of the Future

Pioneering CDOs and Their Enduring Legacy

Innovation and agility have long been the hallmarks of the financial services industry. So, it's no surprise that leading players like Goldman Sachs, Morgan Stanley, Merrill Lynch and Citi were among the first movers in DEI over two decades ago, evolving the function from initiatives to business strategies and impact. Today, these companies remain at the vanguard of continued evolution of DEI as a marketplace imperative, staying ahead of shifting talent models and driving innovation through diversity in an ever-evolving landscape.

Seramount's Chief Diversity Officer Collaborative (CDOC) is delighted to host its first **Diversity Innovation Forum** featuring timely conversations with leading CDOs who designed and architected DEI in ways that have shaped the industry, and those who continue their legacies. What was the key to their early success? And what is their vision for the future as we enter uncertain times?

Join us to...



Be Inspired And Continue to Innovate

Navigate shifting political and legal landscapes to safeguard and strengthen your DEI initiatives.



Unlock Strategic Expertise

Harness insights from CDOs who drive business value through DEI strategies. Take away proven tactics for securing executive buy-in and actionable lessons to drive impact.



Strengthen Your CDOC Network

Build connections with peers across industries, discover cutting-edge practices, and foster collaborations that drive innovation and impact in the DEI field



Gain Fresh, Actionable Perspectives

Uncover innovative strategies to navigate the intersection of DEI and today's complex social and political landscape with confidence and clarity.

Hosted by

Morgan Stanley

750 7th Avenue
4th Floor
New York, NY 10019

Fri, February 28th

10:00 a.m. – 5:30 p.m. ET

What is the Diversity Innovation Forum?

The Diversity Innovation Forum is an exclusive experience for CDOC members—a unique and inspiring space to step beyond everyday DEI leadership and reimagine what's possible.



Mark Your Calendars
Register [HERE](#)

Agenda: Friday, February 28, 2025

10:00 a.m.–10:30 a.m. – Welcome Remarks

Subha Barry, *President, Seramount*
Sam Lalanne, *Chief Diversity Officer, Morgan Stanley*

10:30 a.m.–12:00 p.m. – Pioneers of DEI in Financial Services Panel

Trailblazing CDOs from leading financial services including **Citi, Credit Suisse, Goldman Sachs, Lehman Brothers, and Merrill Lynch** will reflect on their experiences evolving DEI practices and securing C-level visibility and partnership. Learn about their successes, breakthroughs and continued impact on the DEI industry.

Moderator, *TBD*

Subha Barry, *President, Seramount (originally CDO at Merrill Lynch)*
Anne Erni, *Chief People Officer, Audible (originally CDO at Lehman Brothers)*
Ana Duarte McCarthy, *Principal, Duarte McCarthy Diversity Consulting, LLC (originally CDO at Citi)*
Larry Ruisi, *Corporate Director, Boards of Directors (originally CDO at Credit Suisse)*
Melinda Wolfe, *Founder and Principal Consultant, Melinda B. Wolfe & Associates (originally CDO at Goldman Sachs)*

12:00 p.m.–1:00 p.m. – Networking Lunch

1:00 p.m.–2:00 p.m. – The Role of the Private Sector in Safeguarding Employees

Explore how shifting legal frameworks and evolving employee expectations are reshaping DEI priorities. Gain insights into aligning DEI with emerging trends and challenges to drive long-term impact.

Barbara Frankel, *Managing Director, Insights, Seramount*

2:00 p.m.–2:15 p.m. – Break

2:15 p.m.–3:45 p.m. – Shaping New Horizons: DEI in Financial Services Looks Ahead

This panel discussion features CDOs from current leading financial services institutions including **Bank of America, Morgan Stanley, and Citi** as they reflect on the current innovations and new horizons in DEI. The conversation will cover staying the course in complex political and legal times for DEI, as well as how DEI is a core value driver for leading organizations now more than ever before.

Ripa Rashid, *Managing Director, Chief Diversity Officer Collaborative, Seramount (Moderator)*
Erika Irish Brown, *Chief Diversity, Equity and Inclusion Officer and Global Head of Talent, Citi*
Jenny Kim Park, *Chief Diversity and Inclusion Officer, Bank of America*
Susan Reid, *Managing Director, Human Resources, Global Head of Diversity & Inclusion, Morgan Stanley*

3:45 p.m.–4:00 p.m. – Closing Remarks

4:00 p.m.–5.30 pm – Poetry Slam (in honor of Black History Month) and Networking Cocktails