

Previous HER Way Events Calendar

November 2017 through March 2022

2022 HER Way Events		
3/15/2022	Investing in Women - The Ripple Effect Impacting Our Homes, Health, and Communities	Join us as we reflect on International Women’s Day 2022, by showcasing investment efforts in women that are positively impacting lives across the globe.
2/2/2022	2022 New Year, New Challenges, New Opportunities	2021 was a stellar year of upside for investors despite dealing with the global pandemic, geopolitical risks, hyper-inflation, and concerns about the Fed-tightening to name a few. Some of the challenges of 2021 are still looming into the New Year. So, what should investors be doing? Hear from two of the brightest minds on Wall Street as we walk you through the markets outlook, the risks and some strategic ideas to help protect your investment assets and nest egg. This would be a great conversation to be a part of especially for those that look for income from their investment portfolios.
2021 HER Way Events		
10/20/2021	Women, Wellness and Wealth	As a gender, women continue to build, influence and control wealth on a global level, whether as heads of households, in corporations, as business owners, couples, estate executors, widows, divorcees, mothers, heirs and more. This growing responsibility means it’s more important than ever for her to understand and analyze the role wealth plays in achieving wellness for herself and those most important to her. This presentation gives your female clients, their networks and

		prospects the tools to empower them to participate in defining and reaching the goals they hold for their financial future—and why a financial advisor is the essential partner in that journey.
9/14/2021	Planning to Grow Old Gracefully	For many, growing old gracefully is easier said than done. As we age, maintaining a high quality of life can feel more challenging, as we may need to rely on others for assistance and even medical care. Designing an aging plan, well before a crisis presents, allows a person the security of knowing that their own standards of care can be met and financed properly.
7/22/2021	Art As A Passion and An Asset	Art has been a means to influence, express and impress for centuries. Develop your knowledge about art and the art world AND create your own work of art with HER Way! Learn what is considered art, how to care for art and why museums are changing and updating their collections... AND relax, be inspired and paint while you learn.
4/29/2021	Cocktails & Change (Ashley Dour)	Adapting to change doesn't always come naturally, but you can learn valuable techniques to help you build authentic behaviors to help you manage your success. In this program you will identify obstacles and create genuine strategies to influence effective professional and personal change.
1/28/2021	Insight to the 2021 Outlook for the US	Ellen Zentner, explains how life after Covid may look a bit different, and consumers will still value “experiences” over “things.” Hear about things Ellen expects will help propel the economy in 2021.
3/11/2021	Resilience and Leadership Girls and Women Leading the Way	Want to know the number one way to improve a girl's odds in the world? Education. Girl Rising is a global campaign that uses the power of storytelling to share this simple truth and transform societies. Christina & Judith will speak to the resilience of women as they lead their communities during the crisis and why investing in girls creates the leaders for future crises and a better world
2020 HER Way Events		

<p>8/4/2020</p>	<p>Energy for performance (Lauren Kemp)</p>	<p>A discussion that will cover the extensive research done by the Johnson & Johnson Human Performance Institute® (HPI) to understand what makes elite athletes reach peak performance. On this call, she will translate this wisdom into actionable tools you can use to achieve greater success — in work and in life.</p>
<p>8/18/2020</p>	<p>Image with Style and Grace (Anne Izzillo)</p>	<p>Working from home & showing up online will continue to be the norm even after businesses and offices open back up. In this interactive, inspiring, and informative webinar, Tania Sterl will explore ways to transition your wardrobe from work from home back to the workplace, and ensure that your image continues to represent a strong personal brand with style.</p>
<p>7/21/2020</p>	<p>Washington Outlook 2020 (Jessica Marshall)</p>	<p>With the US Election fast approaching, we'll take a deep dive into economic and social drivers that can potentially impact election results. How will a Covid -19 and social media driven world influence voter sentiment, campaign messaging and future policy making? What key states should we watch, as presidential candidates attempt to obtain highly sought after electoral college votes? How will election outcomes reflect political party distribution and the balance of powers in the House and Senate? Join us as this highly regarded Head of Public Policy shares HER wisdom and perspective.</p>
<p>5/26/2020</p>	<p>CARES Acts</p>	<p>The Coronavirus Aid, Relief, and Economic Security (CARES) Act What You Need to Know Now for You, Your Friends and Your Family.</p>
<p>7/7/2020</p>	<p>Delaware - Everyday Apps for Extraordinary Times</p>	<p>Everyday Apps for Extraordinary Times Leveraging technology to navigate our new normal</p> <p>COVID-19 lockdowns around the world have challenged us in finding ways to best manage our time. Stuck at home, with limited activities and restricted from places to go, leave many wondering how to stay connected while being more efficient. We will discuss Everyday Apps for Extraordinary Times to help best navigate our days. These</p>

		<p>fun and easy apps appeal to all ages and health and can help to connect all generations. We hope you will join us and learn about these trending insights which improve all our days during these difficult times.</p>
6/23/2020	<p>A New Era Emerges: The Age of Connected Intelligence and Its Impact on Our Lives and Wealth</p>	<p>A virtual conversation with guest speaker Brad Neuman who unraps our next phase of this technological revolution and the connection and impact in our everyday lives.</p>
1/29/2019	<p>Women's Brain Health</p>	<p>Addressing the gaps in Alzheimer's disease awareness, prevention, & treatment. Alzheimer's disease is one of the twenty-first century's greatest health, social, and economic challenges. Women are disproportionately impacted, both as patients and as caregivers. To address this issue, we've assembled a panel of top Alzheimer researchers, advocates, and planning specialists to discuss risk factors, symptoms, and preventive practices for women of all ages and explore ways that women can support themselves, their families, and the patient after an Alzheimer's diagnosis – personally and financially.</p>
6/23/2020	<p>Age of Connected Intelligence (Jeanie Knigin)</p>	<p>We are living in one of the most innovative and disruptive times in our history, and the pace of innovation is accelerating. While markets can change instantaneously, technological revolutions occur over longer periods and create more permanent change. Disruption is occurring across every sector of economy, and we believe we are in the beginning of the next Technical Revolution ... one we call "The Age of Connected Intelligence".</p>
11/10/2020	<p>Ethical Wills (Sharon Cunningham)</p>	<p>Can you identify the beliefs, values and experiences that have shaped your life and driven your success? Do you want to convey your most important life lessons with the ones you hold dear, in addition to effectively transferring your wealth? Jan Blakeley Holman and Ann Margaret Carrozza will lead the discussion on how ethical wills and</p>

		proper estate planning can help you purposefully pass along the legacy you envision.
12/15/2020	Once Upon a Meatball (Anne Izzillo)	The Women of HER Way invites you to a fun evening with Anna Francese Gass, chef and author of Heirloom Kitchen: Heritage Recipes and Family Stories from the Tables of Immigrant Women. Anna will guide us through a recipe demonstration of her friend - Lisetta Farris's Chocolate-Hazelnut Spread while regaling us with the origin of her cookbook. This cookbook contains riveting stories and time-honored family recipes derived from a culturally diverse group of immigrant women. According to Anna, "We could all afford to discover our American heritage at the bottom of a mixing bowl."
10/20/2020	Cyber Security in a COVID World	The Coronavirus pandemic has ushered in what some experts are calling a "cybercrime pandemic." Fraudsters are increasingly taking advantage of these uncertain and unprecedented times to launch COVID-themed scams and entice potential victims. Rachel will brief attendees on the current cyber risk landscape and offer practical tips and suggestions for how individuals can protect themselves.
9/10/2020	Investing in Positive Change: Investing in a More Resilient Future	Create positive social and environmental impact using a variety of investment products seeking to generate market rate returns. Lily has dedicated her career to helping clients integrate socially and environmentally responsible investing into their portfolios, striving for a more resilient and positive future while meeting their financial goals!
5/26/2020	The Coronavirus Aid, Relief, and Economic Security (CARES) Act What You Need to Know Now for You, Your Friends and Your Family	CARES Act What You Need to Know Now for You, Your Friends and Your Family
2019		

HER Way Events		
1/15/2019	Financially Smart	Engaging breakfast discussion on the importance of financial literacy. Speakers provided information about the common financial challenges encountered by women at various stages of life, and tips for how to address them.
4/2/2019	Women and Money: Deep Dive Discussions	<p>At this interactive event, attendees rotated through round-table discussions led by experts on the following topics:</p> <ol style="list-style-type: none"> 1. Good Debt v. Bad Debt 2. Saving for College 3. Social security and Medicare Planning 4. Investing 101 – Back to the Basics 5. Budgeting and Cash Flow Planning 6. Saving for Retirement 7. Estate Planning 101 8. Plan for the unexpected- Insurance Basics 9. How do you pay for life after your paycheck ends? 10. Alternatives 101 – What you should know about them?
6/11/2019	A Healthier, Wealthier You!	Presentation from Amy Zhang, CFA on different ways to invest in emerging healthcare opportunities followed by presentations from healthcare experts on how to effectively manage stress, and to become more physically fit. Attendees learned how to have more years in retirement & how to financially be able to enjoy them!
7/16/2019	Women, Wealth & Wine: Investing in Women & Women in Wine Tasting	Presentation from Jenifer Cannon of Impax Asset Management on the benefits of investing in companies that embrace gender diversity followed by a guided wine tasting of select wines created by women winemakers who are changing the face of the wine industry.
9/17/2018	The Spirit of Philanthropy: How to Give It Away	Donor Advised Funds, Private Foundations, Checkbook Philanthropy – what’s it all mean? What are the tax benefits? This event highlighted simple and practical

		techniques that can make giving it away a financial win for both you and your favorite charity.
11/14/2019	Networking at Any Age	Discussion of ways to network in both your personal and professional lives. Opportunity to meet new people, expanding your connections and finding new passions.
2018 HER Way Events		
1/25/2018	The Impact of 2017 Tax Legislation for Individuals and Small Businesses	Panel discussion featuring Morgan Stanley Research strategists Meredith M. Pickett and Mark Schmidt, CFA, on the impact of 2017 Tax Legislation for individuals and small businesses.
2/14/2018	HER Way with Dr. Melissa Donohue: <i>Money & Relationships</i>	HER Way Committee members Sharon Cunningham & Christina Paul hosted a fireside chat in our NYC office with Dr. Melissa Donahue, Vice President & Senior Wealth Education Specialist at Morgan Stanley on the topic of Money and Relationships.
4/11/2018	An Evening at Gibney Dance: Women's Empowerment through Passion and Purpose	Live performance from the Gibney dancers, Fireside chat and Q&A with entrepreneur and philanthropist Gina Gibney.
5/15/2018	China - Navigating a Complex Relationship	Engaging conversation with one of China's top economists, Dr. Liang Hong (CIO of CICC Bank) and Lisa Shalett, Morgan Stanley's Head of Wealth Management Investment Resources. Dr. Liang candidly shared her thoughts and perspective on the Chinese economy, and the investment opportunities that may well be ahead.
7/10/2018	Pinot with a Purpose	Mary Jane McQuillen, Head of the Environmental, Social and Governance Investment Program at ClearBridge Investments, lead an engaging conversation about what sustainability means for the wine industry, and also for your investment portfolio. This discussion was followed by a wine tasting led by a premier female sommelier.
10/3/2018	Forever Young	Panel discussion with experts in Functional Medicine, Women's Health, and Cosmetic Dermatology featuring: * Dr. Susan Blum, Expert in Functional Medicine * Dayna Kurtz, LMSW, CPT, Expert in Optimizing Women's

		<p align="center">Health</p> <p align="center">* Dr. Meghan O'Brien, Specialist in Cosmetic Dermatology Presentation from nationwide about planning for retirement and social security</p>
11/27/2018	Tis the Season for Tech	<p>Presentation led by McQuarrie on the different technology tools that can help you manage priorities such as personal productivity, security, parenting, and health/wellness, allowing you to effectively accomplish more each day. Overview of mobile banking capabilities at MS led by Private Banker. Networking & Raffle to celebrate the 1 year anniversary of HER Way.</p>
2017 HER DAY EVENT		
11/14/2017	Her Day 2017	<p>An interactive and immersive full day event designed to help attendees sharpen their life's narrative, and contribute to their success and well-being. The day featured various engaging "HER Talks" curated around the topics and themes of health and wellness, personal and professional development, personal finance, entrepreneurship, and philanthropy. Featured speakers for the event include Gloria Steinem, Bobbi Brown and Shelley O'Connor.</p> <p>Click here to learn more about our featured speakers and HER Talk presenters: https://www.morganstanley.com/cs/pdf/9040153_Bio3.pdf</p>

