SII 2021

EXCELLENCE IN LEADERSHIP DEVELOPMENT

General Information

$4,250 - SIFMA Members / $6,250 Non-Members

- 23% savings in tuition
- 44% estimated savings in total annual spend (tuition/travel/housing)

January 25 – April 16

- Curriculum offered over 3-month period
- Participants can complete curriculum in a few weeks or spread it out over 3 months

Contact Kristin Sheehan or Erin McNicholas at sii@sifma.org

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## Program Overview

### YEAR 1
- (Access to at least 24 sessions and 1 simulation)
- 9 required lectures
- 4 required electives
- 1 simulation (optional)
- 11 additional lectures (optional)
- Additional guest lectures

### YEAR 2
- (Access to at least 31 sessions and 1 simulation)
- 6 required lectures
- 4 required electives
- 1 simulation (optional)
- 15 additional lectures (optional)
- 6 refresher lectures from Y1 (optional)
- Additional guest lectures

### YEAR 3
- (Access to at least 37 sessions and 1 workshop)
- 5 required lectures
- 4 required electives
- 1 workshop (optional)
- 17 additional lectures (optional)
- 10 refresher lectures from Y1 & Y2 (optional)
- Additional guest lectures

## Program Benefits
- Live programming for all sessions with required sessions offered multiple times
- Increased access to SII faculty via small group sessions and office hours
- Access to more sessions through optional lectures
- ”Refresher programming” available for Years 2 & 3 – access to previous year’s sessions
- Session times will not compete, participants able to attend all available sessions
- Small group project work in all simulations/workshops
- Discussion boards for each session for participant and faculty content discussions
- Enhanced participant profile and filters with participant matching by commonalities

## YEAR 1 REQUIRED LECTURES
- **Industry**
  - Financial Markets Update - Jeremy Siegel
  - History of Business – Paul Tiffany
  - 1 lecture from Investor Issues list under Optional Lectures
- **Leadership & Professional Development**
  - Ethics – Peter Conti-Brown
  - Firm Culture – John Spence
  - Generational Intelligence for Leaders - Yael Sivi
  - Microinequities - The Power of Small - Stephen Young
  - 1 lecture from Diversity & Inclusion list under Optional Lectures
- **Strategy**
  - Critical Thinking – Roch Parayre

## YEAR 2 REQUIRED LECTURES
- **Industry**
  - Financial Markets Update - Jeremy Siegel
- **Leadership & Professional Development**
  - Ethics – Peter Conti-Brown
  - 1 lecture from Diversity & Inclusion list under Optional Lectures
- **Strategy**
  - Enterprise Mindset – Kathy Pearson
  - Linking Finance and Strategy – Joseph Perfetti
  - Scenario Planning – Roch Parayre

## YEAR 3 REQUIRED LECTURES
- **Industry**
  - Financial Markets Update - Jeremy Siegel
- **Leadership & Professional Development**
  - Economic, Financial, and Demographic Trends - Jeff Rosensweig
- **Leadership & Professional Development**
  - Ethics - Peter Conti-Brown
  - 1 lecture from Diversity & Inclusion list under Optional Lectures
- **Strategy**
  - Leading Change- Dafna Eylon
Industry
- Business and Public Policy – Jeff Rosensweig
- Central Banking in a Global Context – Peter Conti-Brown
- China/TBD – Paul Tiffany
- Economy of Trump/TBD - Paul Tiffany
- Emerging Markets - Candice Tse
- Factor Based Investing – Chris Geozy
- History and Future of Money – Peter Conti-Brown
- How Well Do You Understand Your Firm’s Financial Statements – Jerry Schreck
- Monetary Policy: The FED and the Impact of the Job Market - Jeff Rosensweig
- Private Equity – Burcu Esmer
- Womennomics – Candice Tse
- Most Important Thing – Andy Bernstein
- Understanding Customer Behavior - Jonah Berger

Leadership & Professional Development
- Applying Mindfulness at Work – Maria Sirois
- Communication Style – Anne Greenhalgh
- Conflict Resolution - The Toughest Skill Set of Them All – Eric Baron
- Courageous Leadership - Dafna Eylon
- Cultivating Collaboration Through Psychological Safety – Yael Sivi
- Leading with Emotional Intelligence – Dafna Eylon
- Mastering Stress, Resilience and Change - Andy Bernstein
- Mental Health, Resilience and Stress – Eylon Perfetti
- Effective Communication Style – Anne Greenhalgh
- Creating an Environment for Active Listening – Jennifer Stone
- Managing Performance in a Difficult Economy - John Spence
- Strategies for Life Success – John Spence

SIMULATIONS / WORKSHOPS

Wharton Interactive/Learning Lab simulations – Year 1 & 2
- Small group multidisciplinary virtual activity
- Focus on Leadership, Negotiation, Teamwork, Crisis Management

Small Group Workshop – Year 3
- Small-group, project focused opportunity

OPTIONAL LECTURES

Cyber (Year 1 maximum of 2)
- Cyber Security – Tom Patterson
- The Evolving Cyber Threat Landscape – Chad Renfro

Diversity and Inclusion (Required programming for All Years – required to choose 1)
- Building an Evidence-Based D&I Strategy – Gail Greenfeld
- Diminish Capacities in the Senior Financial Advisor – Daniel Marson
- Gender Diversity and Ethics in the Workplace – Mary-Hunter McDonnell
- Inclusion and Diversity: Moving from Conversation to Results – Brad Messinger
- Millennials and Gen Z – Yael Sivi

Investor Issues (Year 1 required to choose 1)
- Healthcare Spending – Lawton Burns
- Retirement Challenges – Olivia Mitchell
- Why Social Security Matters – Robert Kron
- Strategy – Jonah Berger
- Artificial Intelligence – Speaker TBD
- Big Data and Machine Learning in Lending – Shimon Kogan
- Emerging Technologies in People Analytics – Sonny Tambe
- How Transformation is Impacting the Customer Relip in Fin Svcs – Eric Rich & John Stefani

Keynotes
- Designing Your Business – Mike Walsh
- The Soulset Revolution – Philip McKernan

Additional sessions in development

VISIT WWW.WW.SIFMA.ORG/SII
FOR MORE INFORMATION
Contact Kristin Sheehan or Erin McNicholas at sii@sifma.org