

PAM

PRIVATE ASSET
MANAGEMENT



EMERGING MARKETS, NEW POTENTIAL

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for family office
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THE 50



MOST INFLUENTIAL WOMEN IN PRIVATE WEALTH

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After gathering nominations from our subscriber base, industry experts and our editorial board, PAM has established its inaugural feature chronicling the 50 most inspirational and influential women in North America's private wealth space. Recommendations for inclusions were taken from across the board – from family office leaders, private banking executives, and insurance and lifestyle specialists. The industry professionals are not ranked in any kind of order, but placed alphabetically.

Women now control 51% of global wealth, a percentage which is only set to rise further, according to research from the Bank of

Montreal's Wealth Institute – and as these numbers spiral, a need for advisors who can empathize with and give a level of comfort to the clients they serve will need to grow in tandem.

Still, according to the CFA Institute, only 19% of CFAs are women – and as the industry leaders that we spoke to will attest to, the demographics are still weighted heavily in the male favor throughout the private wealth space. However, these 50 women – and their successors – are determined to encourage a change in those statistics. With opportunities set to grow dramatically in the coming years for financial services professionals, meet the pioneers flying the flag for female equality.



CAROL PEPPER
CHIEF EXECUTIVE OFFICER,
PEPPER INTERNATIONAL LLC

Pepper founded the New York-based family office which bears her name in 2001. She has more than 25 years of experience in the wealth management industry, and frequently lectures around the world on various issues affecting the family office space.

"Private wealth management is a delicate business – the profession demands loyalty, confidentiality, analytical thinking, empathy and common sense. Luckily, as Camilla Webster and I wrote in *The Seven Pearls of Financial Wisdom: A Woman's Guide to Enjoying Wealth and Power*, in a chapter entitled *Choose A Female Investment Advisor*, many women possess these traits naturally. While other areas of finance still lack a significant number of senior women, private wealth management boasts an impressive number of female thought leaders, senior managers and CEOs. This profession is welcoming to women and I believe women will continue to raise the standards and to enhance the practice of private wealth management. I am excited to see a number of young women entering the field and bringing their energy and new ideas, which I am sure will propel the industry forward."

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JENNIFER DEMPSEY FOX, MANAGING DIRECTOR, WEALTH STRATEGY, HAWTHORN, PNC FAMILY WEALTH
COVENTRY EDWARDS-PITT, MANAGING DIRECTOR & CHIEF WEALTH ADVISORY OFFICER, BALLENTINE PARTNERS

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RODRIE GREGORIO, NATIONAL PARTNER-IN-CHARGE, MARCUM FAMILY OFFICE GROUP
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ABIGAIL JOHNSON, PRESIDENT & CHIEF EXECUTIVE OFFICER, FIDELITY INVESTMENTS
LAURIE KAMHI, MANAGING DIRECTOR, PARTNER, HIGHTOWER
CAROL KROCH, MANAGING DIRECTOR, WEALTH AND PHILANTHROPIC PLANNING, WILMINGTON TRUST
LAURIE KRUPA, MANAGING DIRECTOR, GLOBAL WEALTH AND INVESTMENT MANAGEMENT BANKING, BANK OF AMERICA MERRILL LYNCH
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