



HAVERFORD

SPEAKER SERIES

— *for* —

WOMEN[®]

VIEWPOINT

THURSDAY, OCTOBER 12, 2023

*Business Leadership
Insights*

HAVERFORD

SPEAKER SERIES

for

WOMEN[®]

TODAY'S PROGRAM

At The Table: Business Leadership Insights

THURSDAY, OCTOBER 12, 2023

7:30-8:00 AM

Registration and Networking

8:00-9:30 AM

Breakfast, Featured Presentation and Audience Q&A

Why do so many people aspire to have 'a seat at the table'? Many great conversations happen while sitting around a table with people we know, admire, or even those we've just met. Haverford Trust invites you to join us "At The Table", a Speaker Series for Women candid conversation about things that matter most.

In honor of National Women's Small Business Month, a panel of executives will share stories and ideas on balancing personal and professional lives – taking calculated risks, battling imposter syndrome, the impact of social media, and other considerations we may encounter in our multidimensional lives.

WELCOME

A Woman's Viewpoint

Celebration Alert! This year it was announced that 52 of the Fortune 500 businesses are run by women. It is an all-time high that finally breaks the 10% mark. While a relatively small number considering that half of the world is female, as recently as 2000, only four women led Fortune 500 companies. I'm willing to bet that the women who earned these positions over the course of the last 23 years did so while facing many of the challenges you and I also contend with every day.

Health, family, careers, finances, and friendships are just a few of the responsibilities we all prioritize and reprioritize on a daily basis. I can't be the only one who occasionally trades my yoga class for a visit with my parents (who I am lucky enough to still have) or who starts work early on Halloween so I can be home before it's time to trick-or-treat.

This episode of our Speaker Series for Women gives me a chance to introduce you to several women whom I deeply respect. We'll talk about their work as well as the decisions and challenges they manage every day along with their careers. This Speaker Series for Women also has a few new twists!

First is this expanded publication entitled *Viewpoint*. We saw so many unique facets to our guests and the topics they'll be covering that they needed a brighter spotlight.

For the second twist, we are sharing the stage with The Wardrobe. Haverford Trust has been working with this nonprofit through our employee-led community engagement initiative, Haverford Cares. Earlier in my career I had the privilege of serving as board chair for The Wardrobe, fostering lifelong friendships and shaping the programs you will hear about from their executive director, Sheri Cole.

Our final new element is the format of the event, which we're calling "At The Table." Here we bring together several women to share their viewpoints in a conversation over a great cup of coffee. What each of these successful businesswomen have



Veronica McKee, Chief Marketing Officer at Haverford Trust, and Wardrobe Executive Director Sheri Cole at their 2023 fundraising bingo-gala.

in common is intentionality, self-awareness, an ownership mindset, and dedication to leading by example.

October is Women's Small Business Month, a time to recognize and celebrate women-owned businesses. It's a time to acknowledge the outstanding progress female entrepreneurs have made over the years. It is also Breast Cancer Awareness Month, LGBT History Month, National Domestic Violence Awareness Month, and World Menopause Month. Many women in our lives, whether it be ourselves, our loved ones and dear friends or our neighbors, may be impacted by these causes.

I hope you'll find a way to support, mentor, nudge, or celebrate the women around you this month, and always.

Veronica McKee



YOUR OPINION MATTERS TO US

Please scan the QR code to share your ideas for upcoming events and your thoughts on today's event. We can't wait to hear from you!

FOR EILEEN CHAMBERS,

Women Have Always Belonged in Finance

Eileen Chambers grew up as one of eight children to hardworking parents. “Growing up, I had love and comfort, but we didn’t have financial security,” Eileen said.

Her mother instilled in Eileen and her siblings the importance of education and pursuing their own paths to financial success. Today, Eileen is Vice President and Portfolio Manager at The Haverford Trust Company and one of the longest tenured individuals at the firm. Her career in financial services has molded her into a fierce advocate of financial literacy and power for women.

EMBRACING OPPORTUNITY & FINDING HER CAREER PATH

At Philadelphia University, Eileen studied finance and economics. She always loved numbers and math, but accounting wasn’t her calling. The idea that you could grow wealth beyond your earned income through investing was fascinating to her and led her to pursue a career in investment management.

“In 1991, it was characterized as the worst job market for college graduates. I was fortunate to have had the opportunity to meet with the leadership at Haverford. The sense of knowledge, ethics and caring is why I wanted to begin my career here,” Eileen said.

Over her nearly 32 years at Haverford Trust, Eileen has grown in tandem with the Company. For her, like most powerful leaders, career growth looked a lot more like climbing a jungle gym than a linear ladder.

She began her career as a portfolio accountant in the operations department and was underwhelmed with her first task: stapling.

“My wonderful mother told me, ‘You will do whatever they ask you to do and do it with grace,’ and I did. And it led to such an incredible career,” Eileen said.

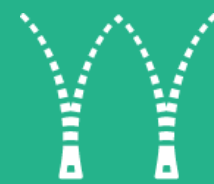
That experience taught her a powerful lesson about persistence and that hard work can open doors to something better. Stapling gave Eileen opportunities to offer support to other portfolio managers in operations, which is how she met one of her greatest career mentors, Joe McLaughlin, Chairman and CEO of Haverford Trust.

“He really forged a path for me to work with several departments at Haverford including operations, trading, investment management. In 2001, he invited me to co-manage accounts with him. That led to my desire to work with clients in portfolio management,” Eileen said.

Eileen has spent much of her career in investment management focused on portfolio performance. In recent years, she’s added financial planning as the firm has built out that service.

“Goals-based planning has been a revival of my excitement. Performance returns can be lumpy in the short run. Financial planning brings to the conversation a way to pivot when circumstances change and to plan for situations that might not be desirable,” Eileen said.





This work has fueled Eileen’s passion for helping her clients achieve financial stability and their version of financial success. In her words, financial planning provides a baseline foundation to make good decisions and, more importantly, avoid bad ones.

EMPOWERING WOMEN TO TAKE CHARGE OF THEIR FINANCES

If you ask Eileen what her biggest pet peeve is, she will tell you it’s when clients say they don’t look at their paycheck or open their statements. Her advice: don’t trust anyone that much with your money.

“There are two things that drive our success in life – the people we surround ourselves with and how we manage our money. You being in control of your money rather than your money being in control of you is your independence, your happiness, your security, your self-esteem. It plays a role in so many aspects of your overall success in life,” Eileen said.

To Eileen, financial literacy is a skill every person should have, especially women. “Knowledge is power” is her mantra.

The key to building wealth, in her opinion, is making good decisions along the way and sticking to them.

“There’s an assumption you have to hit it big to have money – win the lottery or inherit wealth. But it doesn’t have to be ‘one moment.’ You can be a hard worker and accumulate a lot of wealth,” Eileen said.

Eileen credits much of her success to those early lessons from her mother, and now she’s passing them onto her children. At least once a month, Eileen meets with her one daughter who recently graduated from college for Sunday morning coffee chats to talk

finances. They check-in on her budget, long- and short-term savings and her financial goals. Some of her daughter’s friends have even joined the conversations.

“I can see their demeanor change as we talk, like this big, overwhelming subject has become less intimidating,” Eileen said. That was the goal of her discussions with her daughter along with showing her that your finances are not something you can leave to someone else to manage. That’s advice she recommends every parent give to their children.

Throughout her career, Eileen has seen the evolution of gender diversity in the financial services industry, with more women joining and succeeding in the still male-dominated field.

“The opportunity for women in the industry is incredible. Women tend to live longer than men, meaning more women are managing estates and portfolios. So having a female voice as an advocate for female investors for the long run is really valuable,” Eileen said.

For women who are interested in joining the financial services field or those who want to be more proactive with their personal finances, Eileen strongly recommends reading and absorbing as much information as they can.

“I have strong women clients who manage the assets, budget, bills, and stocks for their household and they’re in their 80s and 90s. They read the *Wall Street Journal* cover to cover every single day,” Eileen said. “That has always been fascinating to me, but not surprising because I came from a household where my mother did that, and I certainly do all of that. Now, I encourage my kids to be as involved in their own finances.”

A message that holds true for women of all ages.



EILEEN’S FINANCIAL ADVICE FOR WOMEN OF ALL AGES

1. Knowledge is power. Understand at least the very basics of investing.
2. Look at your paycheck and your statements each month to know where your money is going.
3. Understand what you’re spending and distinguish between what you need vs. what you want.
4. If you need help managing your finances, don’t hesitate to get it.
5. Know that you have the tools to achieve financial stability – and use them.

The Wardrobe is a nonprofit social enterprise open to all. Our goal is to eliminate clothing insecurity by outfitting people for life or work.



Shop & Donate to Support Our Mission

Monday - Saturday from 11 AM - 6 PM

Shop: Purchases at our resale stores and Wardrobe Box subscriptions directly fund our free clothing programs.

Donate: Your gently used clothing and accessories provide new outfits to anyone in need!

Store Locations:

PHILADELPHIA
413 N. 4TH STREET
PHILADELPHIA, PA 19147

UPPER DARBY
62 W. MARSHALL ROAD
LANSDOWNE, PA 19050



To learn more about The Wardrobe and donation guidelines:



WardrobePA.org @thewardrobeorg

MEET TODAY'S *Presenters*

EILEEN D. CHAMBERS, CTFA

Vice President & Portfolio Manager

Eileen Chambers has been with Haverford since 1991 and has more than 30 years of experience in financial services. Eileen is Haverford's former Vice President of Operations and a past-chairperson of Haverford Trust's Operations Committee. Currently as Portfolio Manager, she develops client relationships and manages investment portfolios.

Eileen obtained her bachelor's degree from Philadelphia University and holds FINRA Series 7 and 66 licenses. She is a graduate of the Cannon Financial Institute Personal Trust Graduate School and earned a Certified Trust and Financial Advisor certification (CTFA). Eileen is a member of the Chester County Estate Planning Council, the Philadelphia Estate Planning Council, and the Society of Financial Service Professionals.

Q&A

Who are your role models?

My mother – her power to love overcame so many challenges and created such amazing human beings.

What is something on your bucket list?

Live to see my grandchildren have children.

How do you get unstuck and reinvigorate your motivation?

Walk away for a bit and do something different – could be helping others, reading, or being with loved ones.



VERONICA MCKEE, CMP *Chief Marketing Officer*

Veronica McKee rejoined Haverford in 2019, bringing more than 20 years of marketing experience to the role of Vice President, Marketing and Chief Marketing Officer. Veronica serves as a member of the Executive Committee, and oversees all aspects of branding, marketing, communications, and events at Haverford. She is the executive advisor for the Company's ESG-focused Sustainability Council; leads Haverford Cares, a community engagement initiative; pilots Team DEI, promoting diversity and inclusion; and spearheads the Haverford Speaker Series for Women®.



Veronica earned her bachelor's degree from Penn State University, Graduate Certificate from Villanova University, and Executive Education Certificate from the University of Pennsylvania. When she isn't working, you can find Veronica working on her fixer-upper house in Wayne with her husband, or volunteering with her two rescue dogs and Therapy Dogs International or Fred's Footsteps where she serves on the Board.

Q&A

Who are your role models?

Abigail Adams, Eleanor Roosevelt, and Shirley Chisholm – women who worked tirelessly to advance the rights of all people, particularly for women, and deployed their political influence to better this nation.



What is something on your bucket list?

To see the Aurora Borealis.

How do you get unstuck and reinvigorate your motivation?

Finding a moment of clarity, whether it's a quick (or long) walk, a talk with a friend, or a glass of wine and using that time to refocus and recommit.

KIM WRIGHT

Owner, Nothing Bundt Cakes

Kim Wright is the owner and operator of Nothing Bundt Cakes in Wynnewood, Springfield, Wayne, Warrington, and Collegeville, Pennsylvania, where you can enjoy the most delicious bundt cakes you have ever experienced! Nothing Bundt Cakes loves participating in local events and supporting its communities through fundraising and donations.



Prior to opening her first bakery in July of 2018, Kim co-founded Wright Commissioning with her husband, William Wright. Wright Commissioning is a Philadelphia-based commissioning firm in the construction industry, with projects across the U.S. She is a native-Texan who has been living in Pennsylvania for over a decade. Kim is a proud boy mom to sons Aidan, twins Brady and Jack, and Charlie. When she isn't sharing delicious bundts around town, you can probably spot her at an ice rink, cheering on her sons playing the entire family's favorite sport – hockey. Kim's signature hashtags: #bossmom #bundtlife #boymom #hockeymom #goaliemom #raisingthemWright

Q&A

Who are your role models?

My Grandmother was a woman before her time. She was an immigrant from Mexico. While she took care of my cousins and me in her home, she ran a business out of the front room as a seamstress. She had a generous heart, mild-nature, and was soft-spoken but never allowed herself to be taken advantage of. When she made up her mind, you knew. As I attempt to grow my business and run into challenges, I have been thinking of her and the obstacles she must have faced. It's inspiring how she continued forward while making homemade tortillas for a household of grandkids. I'm awed thinking about it as an adult. How blessed am I to have had such a role model from birth.

What is something on your bucket list?

I'd love to do an equitour in Greece. It's a vacation tour where all of the travel is done on horseback. In Greece, lots of it is near the ocean where you can walk your horse through the water. Greece is on my bucket list but to add the horse tour, too, would put it over the top for me.

How do you get unstuck and reinvigorate your motivation?

It's so important to have a tribe of people you trust and can be completely honest and authentic with. When I'm feeling stuck or down, I have a few close friends (also entrepreneurs) that I can call, text, or zoom anytime. Sometimes they tell me what I want to hear, sometimes they tell me what I dread hearing, but they ALWAYS tell me what I need to hear. As long as I'm open to trusting them most of the time, their advice gets me moving in the right direction again.



SANDY PFEFFER

Managing Director,
Deloitte, Greater Philadelphia
Marketplace Leader

Sandy Pfeffer is the marketplace leader for Deloitte in Greater Philadelphia and a client leader for several of Deloitte's financial services clients. As marketplace leader, she oversees over 2,100 professionals and is responsible for the strategy, business development, corporate citizenship, and other strategic initiatives across the region. She prides herself in building on Deloitte's strong legacy: providing high-quality client service, investing in a world-class talent experience for our people, and positively impacting society.

She has spent most of her career serving clients within the Financial Services and Hospitality industries, primarily public companies on key strategic initiatives.

She is a passionate advocate for people and her community. Sandy serves on the Deloitte Greater Philadelphia Corporate Citizenship Council and the Diversity Equity & Inclusion Council, and she was the past Women & Allies Community executive sponsor. She serves as the Chair

for Women United of the United Way of Greater Philadelphia and Southern NJ and is an active sponsor and champion of Girls Inc. of Greater Philadelphia & Southern NJ. Sandy joined the board of trustees of her alma mater, Gwynedd Mercy Academy High School in 2020 and chairs the finance committee.

Sandy was recognized in 2013 by the *Philadelphia Business Journal* as one of the region's 40 Under 40, in 2019 by Girls Inc. of Greater Philadelphia and Southern NJ for her contributions to women and girls in the region, and in 2023 was honored by City & State Pennsylvania – Above and Beyond as one of the Distinguished Women in Pennsylvania.

Sandy is a member of the American Institute of Certified Public Accountants and the Pennsylvania Institute of Certified Public Accountants. Sandy holds a B.B.A. in accounting from Temple University and is a certified public accountant licensed to practice in Pennsylvania and New Jersey.

Q&A

Who are your role models?

My parents were my first role models. My dad was an accountant that had worked

in public accounting before he started his own CPA practice. My mom went back to finish college after my brother and I were old enough for school. She worked, but was also at every soccer and softball game. Both were wonderful in connecting with people and understood the value of relationships – and in their own ways, demonstrated tremendous generosity for others. I learned so much from both of them, and I see them in who I am today.

What is something on your bucket list?

Achieving the role of Deloitte Greater Philadelphia Marketplace Leader was on my "list." In our Deloitte goal form there was a non-evaluative category of aspirational goals. For the past four years or so, I had this role on my form. As I've reflected on this, I've realized the importance of putting something out there, whether personal or professional. You may not achieve your exact goal, but you will have a north star, which will give you guidance and direction.

How do you get unstuck and reinvigorate your motivation?

Engage with people – talk with my team, my colleagues, folks in the marketplace, and in the community. Especially post-pandemic – our calendars, and our days are filled with calls and meetings – it can be challenging to schedule those 1:1 connects or attend an event that isn't about "getting something done."

I find what fills me up the most, and gives me energy, is to have those conversations. To engage with others – and to give them space to talk about them!

Giving people an opportunity to talk about themselves, and what they are feeling, is a gift we can all give others in our lives!

DEVON WINTER

Chief Operations Officer,
F.W. Winter Inc. & Co.

Devon Winter is the Chief Operations Officer of F.W. Winter Inc. & Co., a metal and alloy powder manufacturer for automotive, welding, and aerospace industries, a second-generation small manufacturing company. She began as a Sales and Marketing Associate for F.W. Winter. In her role, she supported outside sales with document control and logistics. In 2016, Devon became Director of Operations, successfully implementing lean manufacturing and the ISO 9001:2015 quality management system for the company. In 2020, she became Chief Operations Officer, overseeing the management and operations of the company globally, in Russia, China, Europe, Asia, and Africa.

Devon holds an undergraduate degree from The University of Vermont, during which she spent a semester studying business at Qingdao University in Qingdao, China. She holds an M.S. and an M.B.A from Drexel University, and serves on the Board of Women in Manufacturing (WiM). WiM is the only national and global trade association dedicated to providing year-round support to women who have chosen a career in the manufacturing industry. At present, more than 20,000 individual members representing more than 2,500 manufacturing companies have joined our growing ranks of industry professionals from 48 U.S. states and from 35 countries.

Devon is a member of a number of international and national organizations including The Union League of Philadelphia, Philadelphia Chamber of Commerce, World Trade Center of Philadelphia, and the International Chromium Development Association. In her free time, she enjoys travel and is an avid skier, squash, and golf player.

Q&A

Who are your role models?

My father continues to be a role model for me. He represents the American dream. Originally from Germany, his foresight has built a competitive global company over 40 years. I think he represents to me what it means to be resilient in times of uncertainty as well as through adversity. He had little support in the beginning and continued to persevere.



My famous role model is Barbara Cocoran. She is a woman who entered a male-dominated field and really didn't allow setbacks to deter her from going after her dreams. She went on to build a very successful real estate portfolio in one of the most competitive markets in the

world – New York City. Barbara and I are both dyslexic, which makes her upbringing really resonate with me. Barbara embodies thinking outside the box and has shown me that remaining in the status quo doesn't usually lead to success.

How do you get unstuck and reinvigorate your motivation?

I think people underestimate movement. The physical movement of one's body really enables us to work through emotions.

I also really believe in word dumping. Word dumping on a page or in a journal. Get all the thoughts out there; don't gate keep. I think a lot more inspiration comes from this. We have so much going on in our heads at all times and today we are so over stimulated. Sometimes you're not stuck, your brain is just moving too fast.



Words That Inspire

“**NONE OF US DO ANYTHING ALONE**

– we are strong as a group, as a team, as a family. We can achieve anything, if we stand together – stand side by side. And we won't just get by, but we will thrive!

-SANDY PFEFFER

“*You miss 100% OF THE SHOTS you don't take.*

-KIM WRIGHT

“**I DWELL IN possibility.**

-DEVON WINTER

“*No pressure, NO DIAMONDS.*

-VERONICA MCKEE

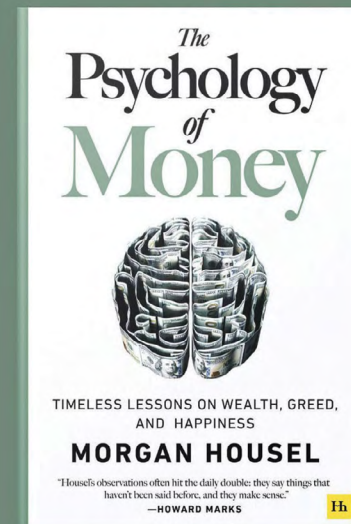
“*I've learned that people will forget what you said, people will forget what you did, but people will never forget how you made them feel.*

-EILEEN CHAMBERS



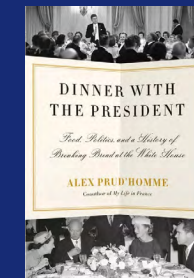
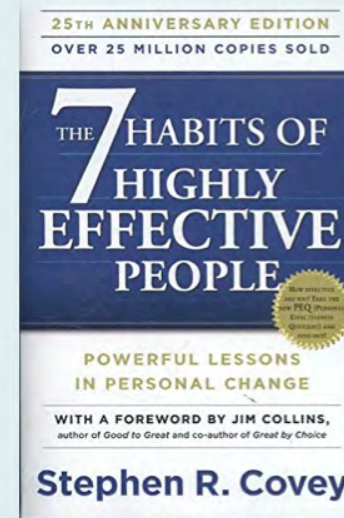
The Psychology of Money
by Morgan House

I think this book gave me a lot of perspective on the timeline of success as well as success vs. failure. The road to success is not linear, and there will be continuous ups and downs. This book gave me a lot of insight into some of the most “successful” business people in the world and their timeline for success. Overall, the message is that success doesn't happen overnight!



The Seven Habits of Highly Effective People
by Stephen Covey

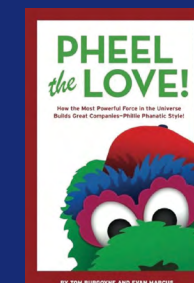
It's an oldy, but a goody and its message is timeless. I read this early in my career and it broke down in simple concepts how to be effective. It was also a lesson in leadership. You must lead and trust yourself first before you can lead others.



Dinner with the President
by Alex Prud'homme



The Millionaire Next Door
by Thomas J. Stanley and William D. Danko



Pheel the Love
by Tom Burgoyne & Evan Michael Marcus

Book List

TOP PICKS FROM OUR LEADERS

ADVICE FOR THE *Next Generation*



Build your network and soak in all the experiences you can get. Find mentors and sponsors – they will be important. Yet, you own your career – only you can take charge and drive it.

Push yourself outside of your comfort zone. Ask for opportunities, experiences, or roles you want. Stay in touch with people. Send short notes when you are thinking about them. Always be your authentic self.

-SANDY PFEFFER



You have nothing to prove to anyone. Achievements are shared experiences. It may look like someone is out there light-years ahead of you, doing what you want to do or standing in the exact place you dream of being.

It takes community and support to take the risks to get there. Sometimes landing on our feet and sometimes falling flat. Community is what will celebrate the wins and embrace the lessons from our losses.

Burnout is such a common thing these days, and most of the time we don't know we're deep in it until we are really in it. There is a disconnect because of the misunderstanding that you have to:

- 1) Do it all, and;
- 2) Do it all on your own.

Whatever your dream may be, build a community around it and stay open. Humans are designed to embrace and participate in community. Whatever goal you're looking at achieving next, I guarantee the people that have achieved it would rarely say they did it all on their own.

-DEVON WINTER



Two of my favorite words are:

Unapologetic

As women, we use the words "I'm sorry" too frequently when we don't have a need to apologize. We need to embrace our choices with confidence, even if they're controversial. We can always make another choice, and we should make that choice without hesitation or apology.

Grace

We tend to give grace easily to others but never to ourselves. We are always a work in progress, and we need to make sure we are giving ourselves the grace we need to grow and achieve more. We will never find success if we are in a constant state of criticizing ourselves.



Try everything you have the opportunity to experience! You are never done becoming.

-VERONICA MCKEE

Stop trying to please everyone – it is an impossible task that leads to self-doubt. Trust yourself & your instincts.

-EILEEN CHAMBERS





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