

# Wharton Financial Services Group

Connecting senior executives with leading authorities on  
human resources and workforce management



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Aetna  
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PIMCO  
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Sandy Spring Bank  
The Travelers Companies  
USAA  
The Vanguard Group  
Wells Fargo Bank

## About Us

The Wharton Financial Services Group is a national forum for senior-level executives in the financial services industry to examine the strategic human resources (HR) and employee relations issues affecting industry employers and their workforces. Through three annual off-the-record meetings, members interact with leading government, legal, and corporate experts, analyze national and global trends, compare experiences, and tackle compliance issues.

### **Financial Services Group members benefit from:**

- Perspectives from current and former government officials, including members of Congress, cabinet officials, NLRB members, and EEOC commissioners
- Thought leadership and research from leading HR academics
- Cutting-edge legal analysis and risk mitigation strategies from a firm with one of the nation's leading labor and employment practices, Morgan Lewis
- Networking and benchmarking opportunities with high-level executives in the financial services and insurance industries
- Access to regular reports on strategic HR, employee relations, HR research and trends, legal and legislative developments, and global employment trends



Join us as our guest at an upcoming meeting and learn more about the value of becoming a member.



# interact & strategize

“I have found the Wharton Financial Services Group forum to be a great opportunity to meet with industry experts and HR counterparts to discuss relevant topics in a meaningful way. While there are various alternatives, I have always found the Financial Services Group experience to be the most significant with respect to current and emerging trends, regulations, new technology, and operating models.”

**Paul Slowik**, Principal, The Vanguard Group

## Past Speakers

EEOC commissioners **Vicki Lipnic** (acting chair) and **Jenny Yang** (former chair)

NLRB chairman **Philip Miscimarra** and former members **Harry Johnson**, **Wilma Liebman**, **Brian Hayes**, **Robert Battista**, **Peter Hurtgen**, **Charles Cohen**, and **William Gould**

US Senators **Johnny Isakson** (R-GA) and **Orrin Hatch** (R-UT) and US Representative **Jim Cooper** (D-TN)

Political commentators **Ken Rudin**, **William Kristol**, **Clarence Page**, **Fred Barnes**, and **Mort Kondracke**

Journalists **Gretchen Morgenson** (*The New York Times*), **Steven Pearlstein** (*The Washington Post*), and **Adam Bryant** (*The New York Times*)



## About the Wharton Center for Human Resources

The Wharton School's Center for Human Resources fosters interaction between academics and practitioners who specialize in HR. Through this partnership, Wharton faculty share the latest research with leading corporate HR and labor relations executives. Through its Research Advisory Group and Financial Services Group, the Center creates opportunities for corporate executives to access current thinking on talent management, labor relations, workforce training and education, and diversity, as well as to network with fellow executives from global employers.

## Contact Us

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