



# THE ASPEN INSTITUTE

## FINANCE LEADERS FELLOWSHIP

The Finance Leaders Fellowship is a global network of high-integrity, entrepreneurial leaders deeply committed to each other and the betterment of society.

### THE PROGRAM

The program leverages the Aspen Institute’s method of text-based dialog through attendance at seminars with a class of fellows in a confidential setting.

Each class consists of 22 Fellows. At no cost to them other than travel, Fellows attend four seminars of 5-7 days in length over a two year period together, under the guidance of skilled moderators of the Institute.

They also commit to undertake a leadership venture of their own design to challenge themselves and advance the role of finance in society.

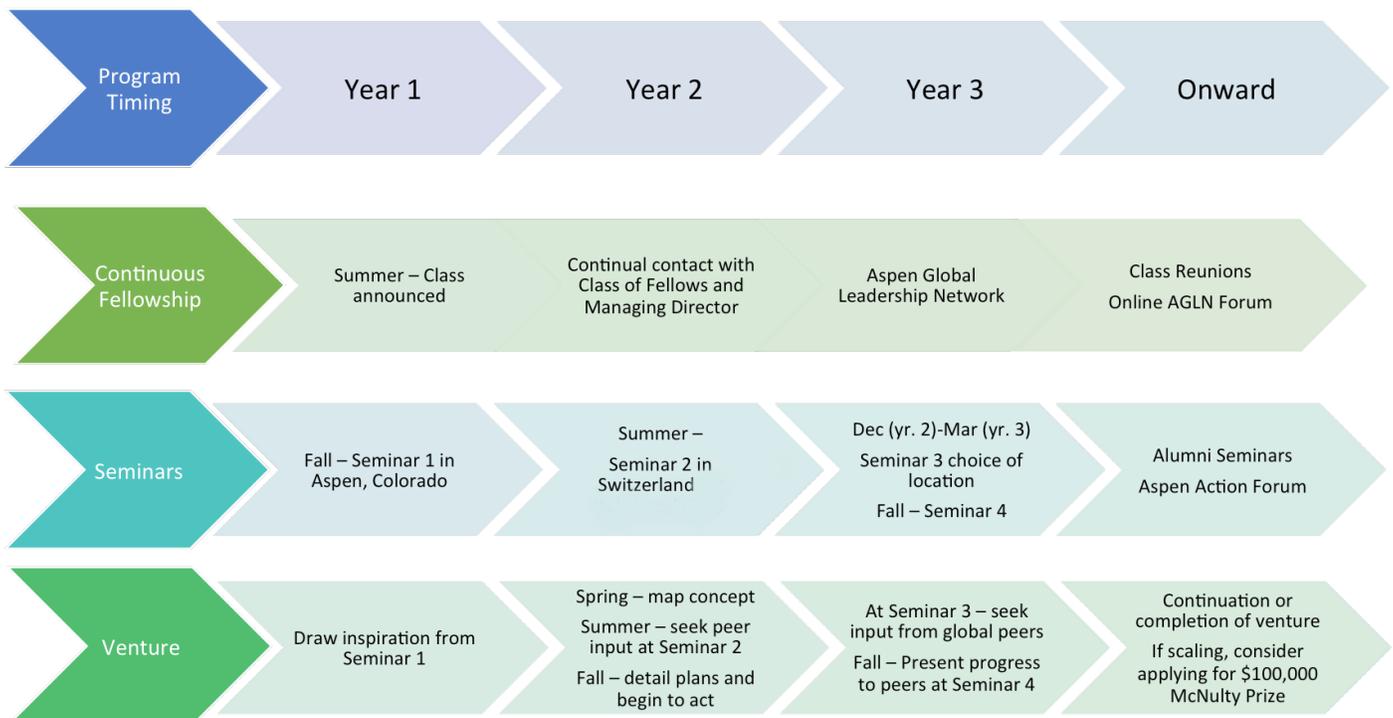
The program was made possible by the lead underwriting support of the CFA Institute and Christopher Varelas, as well as major support from David McCormick, Ranji Nagaswami and Bo Hopkins, Lisa Shalett, the Pactolus Family Foundation, and the Ferguson Nazareth Family Charitable Fund.



### THE SEMINARS

- 1. Challenge of Leadership** focuses on the qualities of leadership necessary to master the forces of change. Fellows discuss their own challenges and develop criteria for effective, enlightened leadership.
- 2. The Aspen Seminar** explores the concept of “the good society” and the Fellow’s leadership role in making it a reality. Fellows present and discuss prospectuses for their ventures.
- 3. Leading in an Era of Globalization** explores the challenges of leading in an increasingly complex world. Fellows across the Aspen Global Leadership Network attend jointly.
- 4. The Promise of Leadership** explores the concepts of legacy and life balance. Fellows share the progress achieved, challenges encountered and lessons learned from their leadership projects.

### FINANCE LEADERS FELLOWSHIP - ACTIVITIES AND TIMELINE





# THE ASPEN INSTITUTE

## FINANCE LEADERS FELLOWSHIP

### NOMINEE CRITERIA

Ideal nominees have achieved considerable professional success. They are at an inflection point where they are ready to step up and lead - creating a broader impact in connecting finance and society.

An annual class of Fellows will be selected from those who are between the ages of 35 and 50, are fluent in English and come from diverse backgrounds in terms of gender, geography, ethnicity, philosophical outlook and area of finance (see Finance Ecosystem Chart).

### SELECTION PROCESS

Candidates for the Fellowship are nominated by someone who understands the AGLN criteria and knows them and their work well.

A shortlist of nominees are interviewed by Jennifer Simpson, Managing Director of the Fellowship and a board member of the Fellowship.

The entire selection process occurs over an approximately 6-month timeframe.

### ASPEN GLOBAL LEADERSHIP NETWORK

Finance Leaders Fellows will join the over 2,500 other Fellows who are part of the Aspen Global Leadership Network (AGLN).

The AGLN is comprised of accomplished leaders from over 50 countries who have participated in similar Aspen Institute leadership initiatives. These include regionally focused Fellowships in the U.S., Africa, Central America, India, China and the Middle East as well as industry focused Fellowships including Environment, U.S. Education and Healthcare, all designed to help accomplished leaders primarily in business, move from "success to significance".

The Aspen Institute, founded in 1950 is a non-partisan, education and policy non-profit. Its mission is to foster leadership based on enduring values and to provide a safe venue for leaders to convene to resolve critical societal issues.

### FELLOWS REPRESENT THE FOUR QUADRANTS OF THE FINANCE ECOSYSTEM

## The Finance Ecosystem

