Michael Frerichs, Illinois State Treasurer
September 16, 2020
Assets Brokered by MWVD Firms

ASSETS BROKERED BY MWVD FIRMS
FY2014 - FY2020

Total Assets Available

$177 Billion brokered under Treasurer Frerichs

Treasurer Frerichs Sworn In

Assets Brokered by MWVD Firms
Assets Managed by MWVD Firms

ASSETS MANAGED BY MWVD FIRMS
December 2014 to June 2020

$3.9 BILLION
as of June 2020
(216-fold increase from December 2014)

Treasurer Frerichs
Sworn In

Period of focus on increasing
utilization of MWVD Broker/Dealers
## Corporate Board Diversity

<table>
<thead>
<tr>
<th><strong>54</strong></th>
<th>Company Engagements</th>
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</thead>
<tbody>
<tr>
<td><strong>40</strong></td>
<td>Added Diverse Board Members</td>
</tr>
<tr>
<td><strong>32</strong></td>
<td>Added a Diverse Search Policy</td>
</tr>
</tbody>
</table>

Successfully engaged over **300 companies** that have now appointed diverse board members.
Equity, Diversity, and Inclusion in Financial Services

Advancing Equity in Banking Commission

Illinois State Treasurer Michael W. Frerichs and Chicago City Treasurer Mellissa Conyears-Ervin convened CEOs of financial institutions to join the Advancing Equity in Banking Commission (AEBC) to address systemic racism within the banking industry.

Financial Services Pipeline

Seeks to increase the representation of Latinos and African Americans within the Chicago area financial services industry by focusing on the talent pipeline, recruitment/hiring, and development/retention.
“Using diverse investment firms is not only about creating growth and opportunity in our communities, but it’s integral to increasing our investment returns.”