

# The 2016 Forum Award Recipients Biographies and Personal Statements of Pari Hashemi and Jessica Tracy

## Pari Hashemi

### Biography

Pari Hashemi is a recognized author, speaker, Certified Financial Planner®, Chartered Retirement Planning Counselor® and Financial Advisor focused on women and finance. Pari is the head of her own team at Wells Fargo Advisors, a team whose goal is to help women reach the top echelons of their business by being financially responsible. Through her wealth management practice, Pari has become an expert on working with women through the process of tailoring an overall wealth management plan based on their goals and needs.

Pari received the 40 Under 40 Award for the *Philadelphia Business Journal* as one of the youngest winners in history. Pari was awarded *SmartCEO Magazines'* Top Wealth Manager for 2015, 2014, 2013, 2012 and 2011, the Five Star Wealth Manager Award for 2015, 2014 and nominated for the 2010 through 2015 Women of Distinction Rising Star Award for the *Philadelphia Business Journal*. Pari received the 2014, 2015 Five Star Wealth Manager award in which less than 7% of wealth managers in the Philadelphia area receive this honor. She was the top fundraiser for the 2011 Leadership Class for the National Multiple Sclerosis Society. Pari's team was named the NABCAP Premier Financial Adviser Team in the region for 2010, 2011, and 2013 year. Pari was also nominated for Forbes 30 Under 30.

Hashemi established her practice while writing articles for various publications including *Forbes*, *The Philadelphia Business Journal*, and *TheGlassHammer.com*. Ms. Hashemi's grounded approach integrates her client's interests as she leverages the critical financial gaps each individual faces. She identifies the personal struggles and driving mechanisms that can help clients achieve the best results from a customized, service-based process.

Her experience and success in the women and finance arena makes Hashemi a frequent resource for news media and an in-demand business speaker. Hashemi's professional speaker credits include the following, among many others: NBC, BenFM, 100 Women in Hedge Funds Organization, Deloitte, Campbell's Soup, UPENN Wharton Alumni Program, LaSalle MBA Program, Independence Blue Cross, Hangley Aronchick, Wells Fargo, National Multiple Sclerosis Society, Morgan Stanley Smith Barney's Best Practices Conferences, University of Pennsylvania, Drexel's MBA Program, Temple University Fox School of Business, National Association of Women Business Owners, The Junior League, and Women in Investment Services.

Pari's passion to assist individuals in career development helps her act as a multidisciplinary connector for networking purposes. She founded the Women's Mastermind Cooperative, a nonprofit that helps connect women professionals. Ms. Hashemi co-founded the Young Professionals of the National Multiple Sclerosis Society where she raised over \$500,000 through

the Preakness at the Piazza event. Pari serves on the Board of Directors for the Greater Delaware Valley Chapter National Multiple Sclerosis Society, one of the largest chapters. Pari also dedicates her time on the Board of Directors of the Samuel S. Fels fund, a \$50+ Million foundation that seeks to support projects “which prevent, lessen or resolve contemporary social problems”. She was also selected as University of Pennsylvania’s Association of Alumnae Treasurer & Board of Directors. Finally, Pari serves on the Board of Directors for Saved Me Inc., a Philadelphia animal shelter that saves animals that would be euthanized.

Pari received her Bachelors of Arts & Sciences from the University of Pennsylvania where she was All-Ivy and record holder for the Varsity Women’s Track & Field team. She currently resides in Center City Philadelphia.

**Personal Statement:**

It is a great honor to be selected as one of the recipients of The Forum Award for Emerging Women Leaders. I would like to thank the women who chose to nominate me and acted as references for their support and inspiration throughout this process.

I have been a Philadelphian since the fall of 2005 when I started my freshman year at University of Pennsylvania. In my time here, it has been a pleasure to not only help educate a diverse group of women on how to be financially successful and independent but also to help local residents through volunteer and economic support work. Similar to the Forum’s initiatives, my business has focused on fostering a positive environment where women work together to build each other up and take over leadership roles in their organizations. My passion comes from my drive to see women’s equality in the workplace. To do so, I have focused on closing the wage gap as well as educating women on how to make savvy financial decisions. I find that the most rewarding aspect of my job as a financial advisor is to help women see success in the corporate space, in non-profit board rooms, and as entrepreneurs.

The positive initiatives of The Forum have helped many women, including myself, rise through the ranks and create an impact on our community. The wise words of The Forum’s members have given me inspiration, sparked hope, and pushed me to have critical conversations not only in my business but in the board rooms where I serve. I have always had such admiration for the women that make up the Forum of Executive Women so it is an honor to receive an award given by its members.

**Jessica Tracy**

**Biography**

As Vice President of Business Development at Conner Strong & Buckelew, Jessica Tracy is responsible for Business Development and Relationship Management for a large privately held commercial insurance brokerage and consulting firm. Her focus is on both Employee Benefits and Commercial Lines Insurance and she focuses on working with organizations in the middle to

large market spanning across the country. She specializes in risk management and analyzing Health and Welfare programs through detailed gap analyses to identify cost containment solutions, plan design strategies, efficiencies in administration, PPACA compliance, wellness strategies, alternative funding arrangements and improving the level of service and resources for new client relationships. Prior to this role, she was on Conner Strong & Buckelew's Data Analytics team working on financial recommendations, plan marketing, cost evaluation, compliance, plan design strategies and renewal evaluations for prospective clients. Jessica also held previous roles as an Underwriter for Independence Blue Cross and Claims/Loss Ratio Management Intern at The Graham Company. As part of her continued professional development, Jessica holds various designations including Group Benefits Disability Specialist, Commercial Lines Coverage Specialist and has also completed extensive courses through the Hartford School of Insurance, Commercial Lines Producer School, International Foundation of Employee Benefit Plans, and Employee Benefits Producer Training Program through The National Alliance for Insurance Education & Research for Employee Benefits, Marketing and Risk Management.

Jessica is very active in the community and spends a lot of her time volunteering for various non-profit organizations. She serves on the Board of Directors of the Domestic Violence Center of Chester County (DVCCC) and with that Chairs the Public Education Committee to spread domestic violence awareness to local middle schools, high schools, colleges and universities and is also on the Personnel Committee to assist DVCCC's CEO on various personnel and human resource items. She also serves on the Board of Directors for the Greater Philadelphia Business Coalition on Health (GPBCH) which represents the employer community in working with health plans, health care providers, and other system stakeholders to improve the value of health benefit spending for its members by improving healthcare quality and safety and reducing health care costs. She chairs GPBCH's Benefit Design Committee which focuses on value based insurance designs, direct contracting and other strategies for large employers. Jessica has also participated in various speaking engagements. She was a speaker, panelist and workshop leader at West Chester University's 2015 and 2016 College of Business and Public Affairs Women's Leadership Forum which focuses on helping college students shape their professional future. She discussed various topics with the students regarding the importance of networking, image management and how to be a successful female in the workplace. She is also an active volunteer on Devereux's Young Professionals Executive Committee, Bringing Hope Home and has supported various other organizations such as the Ronald McDonald House of Southern New Jersey and mentoring engagements with The Monkey and The Elephant. She is a member of the Society of Human Resource Management, PEBA and Chamber of Commerce in New Jersey and Pennsylvania.

**Personal Statement:**

I am truly honored to be recognized by The Forum of Executive Women for the Emerging Women Leaders award. This is a tremendous opportunity and I am beyond grateful to receive this award. I am always eager to continue to grow both personally and professionally and to be able to learn from the amazing women involved in this organization is an invaluable experience. Mentorship is a necessary tool for success and I really appreciate the unique development

opportunity that is afforded to me through this award. Helping others succeed has always been a passion of mine and I look forward to sharing the knowledge I obtain through the program. I am grateful to everyone that has supported me along the way and a special thank you to May Van for nominating me and The Forum of Executive Women for selecting me for this prestigious award. Thank you.