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Diversity and inclusion are core values of our franchise, which should be recognized, valued and rewarded.

One of the keys to our success as a financial institution is to have the best talent in the world delivering creative and innovative solutions to our clients.

We believe that the unique perspectives, backgrounds and experiences of our people create an opportunity for us to improve our productivity, better serve our clients and enhance our competitive advantage.

Diversity is an important part of good leadership that we should encourage in order to be the Employer of Choice in the financial services industry.
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For over 200 years, through its leadership, ingenuity and optimism, Citi has enabled progress for clients around the world. At Citi, you are part of a dynamic, global team that has impact in over 160 countries. With a focus on individual development and a belief in recognizing talent from within, Citi is a place where you can build your career.

Ours is a culture of opportunity for those with the wisdom and courage to do what’s right.

Key EVP Themes

**BUILD CONNECTIVITY**
We are a dynamic, global team that views borders as untapped potential

**UNLOCK POTENTIAL**
We believe in recognizing and developing talent from within

**ACHIEVE IMPACT**
Apply your ingenuity and determination to challenging and rewarding work to make a difference
Welcome to the first quarter edition of the ICG Diversity E-Book.

2013 has started with a great amount of energy and momentum. Over the course of the past few months, I have had an opportunity to reflect on the great work that was done in 2012, and I am indeed proud of what we accomplished. As you know, last year was the first year that we launched the ICG Diversity eBook. We have observed our readership climb dramatically since our first issue in March of last year. Like any new magazine, we are fed off of the energy of our readership and we appreciate those who have taken the time to send us congratulatory notes and feedback.

In this issue, we are delighted to profile the Private Bank and their North American Diversity Committee under the leadership of Tracey Warson. As you will see in their feature, CPB is committed to creating a culture of inclusion and they understand the business impact that a diverse organization can produce.

I want to acknowledge a few significant milestones that have occurred in the first three months of this year:

1. In February, Citi signed the Amicus brief against DOMA (Defense of Marriage Act), which is a 1996 law that defines marriage as between one man and one woman as husband and wife for the purposes of all federal laws. Because of the law, employers treat employees with a spouse of the same sex as unmarried for all federal purposes - including employee benefits, taxes, visas, etc. The US Supreme Court will be viewing DOMA in the case of Windsor v United States and the consideration is whether that law is valid as applied to 1,138 federal, labor, employment and benefits laws. As part of the pending case, Citi joined 270+ companies, states and municipalities who agree that section 3 of DOMA is unconstitutional and creates workplace discrimination by enforcing, among other actions, that companies investigate the gender of the spouses of lawfully married employees and then impose discriminatory tax treatment of spousal health care benefits.

2. In a report published on Thursday, March 7, 2013 by Calvert Investments, Citi was recognized as the most inclusive US Company in the S&P 100 for women and minorities, along with Merck & Co. The report, entitled Examining the Cracks in the Ceiling: A Survey of Corporate Diversity Practices of the S&P 100, reveals that S&P 100 companies have made some progress on corporate diversity since 2010, yet more needs to be done to put substantial numbers of women and minorities into board rooms and executive suites. To view the report, [click here](http://www.calvert.com).

3. Citi once again celebrated International Women’s Day with tremendous pride and passion. Over 13,000 employees came together in 90 countries, 133 cities and 200 events to celebrate the contributions of women as our colleagues and our clients. Job well done to all those involved.

We hope you enjoy this first quarter edition of the eBook and we look forward to a successful year to move our organization forward to creating a more inclusive culture.

Best regards,

Jonathan Simon
Head of Diversity
Institutional Clients Group
Citi
Citi has been around for over 200 years, as the business landscape continues to evolve with game-changing developments, what excites you about a career at Citi?

Citi continues to leverage its global footprint as a competitive advantage and I believe this positions the firm perfectly to maximize the business value of diversity. The evolution of our business model demands that we diversify our talent. The very best talent with different perspectives and diverse professional and personal experience have the opportunity to make a huge impact on the future of the business. Assisting in developing the firm’s capabilities in this space thrills me professionally and challenges me intellectually.
What would you say is the Business Case for Diversity?

I would say that the business case for diversity is that it fosters innovation. By creating a team of individuals who think, look, and act differently, you create an incubator of innovation. This type of environment challenges assumptions and cultivates creative solutions. Our dedication to diversity wins business from our light minded clients. The research shows that it also improves financial performance, widens the talent pool, enhances the brand and reduces business risk. All of these benefits of diversity are important business drivers of a successful company.

Many companies are implementing diversity recruiting programs for senior positions including executive, management and professional roles. Why has this shift occurred in the industry?

Creating a fully formed diversity recruiting program is a process with many interdependent components. Citi has had amazing success in building the infrastructure to support a diversity recruiting program, including executive buy-in, development programs, employee networks, and now a diversity lateral recruiting program. Without a solid infrastructure, the investment in diversity recruiting will not be fruitful. The driver for this evolution across the industry is directly related to the changing demographics of the workforce. It is projected that by 2020, 37% of the US workforce will be diverse and Citi must be prepared to successfully access this talent pool and capture a significant portion of the wallet share.
Citi wants to be known on the Street as the “Employer of Choice” for top talent in our industry. What does the Diversity Lateral Recruiting function bring to the table in terms of skills to help us meet this goal?

The Diversity Lateral Recruiting strategy is built on three primary principles for creating business value – diversity recruiting best practices, labor market intelligence and diversity partnerships. Diversity recruiting best practices will be woven into the fabric of our recruiting function to increase the attractiveness of the firm for all candidates. The recruiting team will build pipelines of the very best talent, creating visibility of the employment landscape. Relationships will be developed with external diversity partners, who deliver access to unique talent pools. Finally, the Diversity Lateral Recruiting team will provide subject matter expertise to hiring managers and HR generalists on how to ensure that candidate slates are diverse.

What are your plans to effectively implement a Lateral Diversity Recruiting Strategy here at Citi?

We are building a cross functional team that will focus on sourcing talent, branding, training and reporting capabilities. Building a successful diversity recruiting practice is a journey and it will take time to deliver enterprise results. As these capabilities are being built, I am partnering with our Diversity Operating Committees to support the immediate business needs.

What would you say to the manager that says “I know all the top talent qualified to fill an open job”?

My response has always been, that’s a great starting point. Give me the names and I will give them a call. In the meantime, have you considered anyone internally? Who are the high performing individuals that you interact with on a day-to-day basis? Would you consider someone from our development programs? Can we promote the position with our employee networks? Can we share the job description with our external diversity partners? By offering the manager multiple channels to source talent and a little finesse, we arrive at a search strategy that is customized to the manager, while delivering a diversified candidate slate.
## Fun Facts about Seth

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Where are you from?</td>
<td>I was born in Bogota, Colombia and grew up in Endicott, New York, the hometown of IBM.</td>
</tr>
<tr>
<td>What’s the #1 most played artist on your iPod?</td>
<td>I am currently addicted to Nicki Minaj, so she is in constant repeat mode on my iPod.</td>
</tr>
<tr>
<td>If you could choose anyone, who would you pick as your mentor?</td>
<td>President Obama.</td>
</tr>
<tr>
<td>If you could witness any event past, present or future, what would it be?</td>
<td>Martin Luther King’s, “I Have a Dream” speech.</td>
</tr>
<tr>
<td>What is something you learned in the last week?</td>
<td>When my general contractor says 3 days, he means 3 weeks.</td>
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Citi celebrates International Women’s Day 2013
Having a diverse workforce, one that mirrors the diversity of our clients and the communities we serve, is essential to the success of our business.”  

–Mike Corbat

IWD Background

International Women’s Day (IWD) is an important global celebration of the economic, political and social achievements of women around the world. IWD has been observed globally since the early 1900’s with the first International Women’s Day observed across the United States on February 28, 1909. In 1977, the United Nations General Assembly designated March 8th as International Women’s Day. Annually on March 8, thousands of events are held throughout the world to inspire women. A global web of diverse and enriching local activity connects women from all around the world ranging from political rallies, business conferences, networking events and government activities, to local women’s craft markets, theatriic performances, fashion parades and more. IWD is now an official holiday in over 20 countries.

Citi Celebrates International Women’s Day

Citi celebrated the economic, political and social achievements of women during the week of March 8th through more than 200 events in 133 cities spanning 90 countries. Many of the events acknowledged women’s contributions to Citi’s history while emphasizing the role women will play in defining our future.

Participation in IWD increased significantly this year with nearly double the number of events and locations in 2012. The success of this year’s efforts is attributed to the important work being done throughout the year by CitiWomen and the numerous women’s councils and networks embedded in local areas, businesses, and functions.

Citi demonstrated that the recruitment, inclusion and advancement of women are business imperatives. As Mike Corbat stated in his video message for International Women’s Day, “Having a diverse workforce, one that mirrors the diversity of our clients and the communities we serve, is essential to the success of our business.”

CLICK HERE TO VIEW
International Women’s Day (con’t)

Highlights

New York
ICG Diversity hosted an event featuring the National Council for Research on Women (NCRW) and Dr. Julianne Malveaux - a labor economist, noted author, and commentator. NCRW, one of Citi’s leading diversity partners, shared its new report on identifying strategies that companies are implementing to advance women of color. The report provided information gathered over a two year period from diversity professionals, researchers, experts, interviews with leading executives, and case studies of eight major corporations.

West Coast
Citi and Cisco celebrated by sharing diverse perspectives on women leadership. The event was hosted live at Cisco’s headquarters and broadcasted via webcast with over 1,000 viewers from which many were Citi employees from 9 different countries. Debby Hopkins and Blair Christie, Cisco’s SVP, CMO WW Government Affairs, kicked off the event discussing the important role women play in today’s workforce. Then, Lynette Lewis, author of the book “Climbing the Ladder in Stilettos” shared her thoughts on the importance of Purpose and of Dreaming Big and suggested ways to tackle the obstacles that often hold us back from achieving what we want. Finally, a panel of Citi and Cisco women executives discussed a myriad of topics ranging from risk-taking, to the role of mentors and personal authenticity. Tracey Warson, MD Global Market Manager for Citi Private Bank, shared with the audience an insightful story on the importance of embracing your authentic self. Attendees found the event to be an incredibly inspiring, energizing and thought-provoking experience.

Tampa
A leadership panel discussion was held and offered insights into breaking through the glass ceiling, creating a balance between work and career, mentoring and supporting other women in the workforce, and anticipated changes and challenges in the future. All panelists agreed that hard work, challenging the stereotypes, holding themselves accountable for their own success, anticipating change and helping each other were important aspects to success for everyone.

Buenos Aires
Argentinian women colleagues gathered for an event called “The Power of Our Image.” Speakers included Silvio Novaro, Head of Latin America Consumer Risk and senior sponsor of the Argentina Women’s Council, as well as a professional coach who shared techniques and skills to help the women balance life and careers. Argentina CFO, Vivianne Caumont, concluded the event by reviewing the numerous local initiatives focusing on women and inviting everyone to participate and to make a contribution.

Mexico
A panel discussion and reception was held for 200 high-net-worth female clients hosted by Manuel Medina-Mora, CEO of Global Consumer Banking. Medina-Mora reflected on the global importance Citi places on marking this day and reviewed the ever-growing role that women play in our company. “Promoting gender equality is a fundamental priority for Citi and Banamex,” said Manuel. “This is more than a matter of justice but of our businesses remaining competitive in Mexico and worldwide.” Prominent political scientists of Centro de Investigacion y Docencia Economicas (CIDE) spoke on the panel.
Mexico (con’t)
Susana Ferrando, President of Mexico’s Women’s Council, noted that since its establishment in 2011, the council has helped expand understanding of the value of women’s contributions to the bright future of Banamex by offering seminars and workshops. A tribute to outstanding Banamex women concluded the event.

Singapore
The celebration included a charity fitness event and a discussion forum to explore how women can balance career and family. Nearly 10,000 Citi colleagues participated to raise a sum of $113,376 for the Tsao Foundation, a non-profit organization dedicated to helping senior citizens improve their standard of living through community health activities and social services.

UK
London marked its celebration with an event featuring psychologist and corporate performance coach Shona Rowan who discussed strategies on how to succeed in a competitive and ever-changing corporate environment.

In celebration of International Women’s Day, CEO Mike Corbat hosted Citi’s top 200 women clients at a cocktail party held on the floor of the New York Stock Exchange (NYSE) on Thursday, March 7th. Corbat expressed his enthusiasm and applauded the many contributions and achievements of our women clients.
Dear Colleagues,

2012 has been a great year for the Diversity Operating Committee (DOC) at Citi Private Bank, and we are extremely proud of the accomplishments achieved this year by everyone. I would like to personally thank all of our committee members that contributed to our progress:

- Natalya Alexei
- David De La Cruz
- Nancy Pellegrino
- Robin Anello
- Ramraghi Fuller
- Ana Rivera
- Melissa Aylor
- Paul Gabbard
- Lisa Roberts
- Jane Bachmann
- Jennifer Gabriele
- Stephane Rodriguez
- Nicola Baker
- Gloria Gomez
- Ann Ruane
- Michael Brandes
- Euching Lin
- Francisco Segarra
- Lillie Brown
- Kush Malhotra
- Van Shell
- Robyn Burger
- Mei Moy
- Sandra Vecera
- Dan Bussiculo
- Nancy Neal
- Sophia Wan
- Lissette Caldero
- Bola Oyesanya
- Jay Yost
- Gladys Chen
- Erica Palmer
- Anna Zeldich
- Lisa Cheng
- Melissa Patino

Last year we accomplished many things including:

- Achieved 90% participation in All of Us Training
- Tripled CPB participation in the ICG Diversity Leadership (DLP) program for 2012
- Partnered with CPB Mentoring Program to include a cross-section of employees with diverse backgrounds
- Built awareness of Diversity tools and resources (e.g., leadership team meetings, Town Hall, CPB Exchange, Monday meetings, Diversity E-book)
- Launched our CPB Diversity website
- Partnered with other businesses within ICG to share best practices (e.g., ICG Diversity Summit)
- Initiated client strategy to focus on the needs of the LGBT/Modern Family market segment
- Leveraged talent for other areas of market focus (e.g., Asian Client Group)

In 2013, our DOC will focus on 3 key areas:

Thank you all for your commitment, support and engagement.

Regards,

Tracey Warson

Head of the Diversity Operating Committee
Private Bank

CPB NA Diversity and Inclusion

Diversity Story Video

What's Your Diversity Story?

Diversity Calendar

Video of the Month

International Women's Day 2013

CLICK HERE TO VISIT THE CPB NA WEBSITE
Dayle Davison, Managing Director at Citi Private Bank, spoke enthusiastically about the importance of networking – particularly for African American professionals.

“Are there challenges for African Americans and women in this industry?” Davison asked. “Sure. But I don’t think they are as prevalent as they might have been in the past. We have come a long way.”

“When I first joined the bank, women wore a uniform – nondescript suits with weird ties. Now we are able to wear clothing that doesn’t try to hide the fact that we’re women,” she continued. “But I think the biggest barrier is the absence of a historical network for women, and definitely for African Americans.”

She referred to a recent Fortune Magazine interview with Bob Johnson, the founder of BET. “He speaks very broadly about building strategic partnerships and your brand identity, but also, he discusses challenges that African Americans in business have faced in breaking through barriers.”

“It comes down to that historical network we haven’t had,” she continued, “but we’re building it, and I feel very good about the future.”

“[I] developed an appreciation and affinity for the space, particularly the real estate component of the business. The idea of developing an expertise was really appealing to me.”
Career in Banking

Davison earned her MBA at Washington University in St. Louis. She credits the Consortium for Graduate Studies in Management, an organization committed to increasing the representation of African Americans, Hispanic Americans and Native Americans in business schools and corporate management, with enabling her to attend. “I would not be sitting at this desk today without the Consortium,” she said.

After graduating, she got an offer from Citibank, and entered the bank’s Credit Training Program. “The energy was incredible and I was thrilled to get to come to New York.”

But soon after she began, the area was reorganized. “It was an early lesson about managing change and a lesson learned hard,” she recalled. Some of Davison’s peers had moved to Chemical Bank, and she joined them in the Bank’s Multinational Division calling on large corporate clients.

Over the years, Chemical Bank became Manufacturers Bank, and Manufacturers Bank became part of JP Morgan, and Davison gained an important international perspective in her work. “But I was still hankering for Citibank,” she said with a laugh. “Citi employed some of the smartest people and you felt valued for your skills.”

She joined Citi’s Corporate Bank in Boston under Bob Parr, described by Davison as an exceptional banker. She later returned to New York and joined a corporate team that specialized in Retail Clients.

“I developed an appreciation and affinity for the space, particularly the real estate component of the business. The idea of developing an expertise was really appealing to me.”

Soon, Davison became pregnant as the unit was being reorganized. Upon her return from pregnancy leave, she joined the Private Bank. “I thought it would just be a stopping ground for me, that I’d just be here briefly. But I’ve never looked back. This is so much more fulfilling than anything else that I’ve done professionally.”

That fulfillment comes from many places, she explained, but one of the big reasons is the relationships she has been able to build with the clients of the Private Bank. “The Private Bank gives you the opportunity to work with some of the wealthiest and most influential people in the country. They are the visionaries and we get to work with them. I’ve been enriched as a person by serving in this function.”

Currently Davison is working on a number of projects, including raising capital for a notable real estate client. “It’s exciting because it involves other areas of the bank like municipal securities and the investment bank – everyone is driving toward the same goal.”

She is also interested in the regulatory changes facing the financial services industry. “It’s just becoming clear what the implications are,” she explained. “It’s hard to know how these things will ripple out.”
Lessons Learned

Davison shared two of her proudest career experiences. “The first one is sobering. When the world was reeling during the financial crisis, I was proudest of the way we served our clients.”

She recalled ensuring that all members of her team could speak with confidence about the FDIC protections and the Bank’s commitment to being there for its clients. “I made sure our team knew the protections from the FDIC inside and out. They could say it in their sleep.” For those clients who remained concerned, the team worked to assure that their assets were handled in keeping with their wishes.

She continued, “We only lost one client who has since come back.”

The second achievement she shared was working with other divisions throughout Citi to orchestrate a $1 billion interest rate swap, the largest executed in the Private Bank. “It demonstrated the breadth of the institution,” she explained.

When it comes to career lessons, Davison continued, she wishes she had learned earlier that “people are people.”

She explained, “You assume because you’re in a business environment that decisions are made on a purely rational basis. But there are always egos and emotions involved, and that’s something I wish I had understood earlier in my career.”

The second lesson she mentioned was the importance of being proactive. “The CEO of the Private Bank in North America Peter Charrington sent out a missive to everyone once, and he used the words ‘carpe diem.’ And I thought, what if I had seized the day when I was younger, rather than just assuming that if I worked hard, good things would just come to me? I think the lesson is that you have to build your own moments.”

Advice for Women in Banking

Davison encouraged young women to specialize early in their careers. “Find something you can throw yourself into. One reason is that it opens up networks. I focus on real estate clients and that begets more real estate clients. Having a brand people identify you with can serve you well.”

Of course, she continued, “You still have to be fluid.” Because the industry changes so rapidly, it’s important to stay flexible and relevant.

She also advised younger women to learn “the art of selling.” She explained, “You’re selling all of the time whether you’re in sales or not. And there’s an art to it. It’s about listening and believing in what you’re doing, and speaking with conviction. You have to understand that people have drivers and being successful means tapping into those drivers to get to something you both want.”

Davison encouraged her peers to get involved in mentoring. “Share your knowledge with others, whether formally or informally,” she said. “If you see someone who is bright and hardworking, put your arm around them.”
Networking and Mentoring

Davison is involved in many activities and networks around diversity. She praised Citi’s African Heritage Network for keeping its programming fresh. “For these networks to work, you have to keep it interesting. They brought in the Tuskegee Airmen, for example, and I thought that was special.”

She has also been involved with the Harlem YMCA’s Black Achievers in Industry.

“But my personal joy, something I’m doing locally begins with my son,” she continued. “He attended New York’s Stuyvesant High School. I started having conversations with him and his friends about economics.”

It started with a question about what a budget is, she explained, and then it evolved into sessions on what financial statements are, the difference between the debt and the deficit, and how businesses are run. “We’ve started making it more formal, and it has given me such joy to teach these young teenagers how to think about the financial world around them.”

In Her Personal Time

“My philanthropy is family-oriented,” Davison said. “My daughter and I are involved with the Riverside Church food pantry. Not everyone is as lucky as we have been, and I think we need to understand the life stories of others. This comes from talking to others.”

She continued, “Every child needs to know ‘but for the grace of God.’ I wouldn’t call that philanthropy as much as a conversation.”

Davison is also a budding carpenter. “I love making furniture,” she said. “My father loved carpentry and I wish I had joined him in those ventures.”

“It allows you to see something through from beginning to end, to create something visible. Although my work doesn’t always stand up to deep scrutiny,” she said with a laugh, “it’s something I enjoy.”

“When the world was reeling during the financial crisis, I was proudest of the way we served our clients.”
1. Current job level and team.

Director (Banker) Citi Private Bank, Canada

2. Describe your role.

I joined Citi as an IF transactor in Vancouver in November 2010 and starting this year I moved into the role of banker. In the past two years I am glad I assisted CPB in having a wider coverage in the Canadian market, especially as it relates to the commercial real estate lending for UHNW clients. In my new role as a Banker, I hope to continue to assist my clients with their lending needs and also expand into providing capital market/investment solutions. I see tremendous potential in this market for Citi given our robust investment platform; talent, global presence and amazing customer centric focus being driven by our senior leaders. I think Citi is very well poised to be a market leader in this space relative to other players in Canada.

3. Career Timeline

I started my career in India as an Analyst in 1996 with a UK based private equity firm and within a year I was promoted to Manager Corporate Finance. In 1998 I moved to Dubai and joined the Investment Banking group of a local financial institution where I managed a US$1.5B Project/Structured Finance portfolio. In 2002 I moved to Canada and joined Bank of Nova Scotia as a Banker in their Commercial Banking Group.
and in 2004 I joined HSBC as a Senior Banker in their Corporate Real Estate Group, where I managed a portfolio of over US$2B and also led their Real Estate Syndication group in Canada.

4. Of your experiences which was the biggest career move and why?
I think the move to Citi has been a very rewarding experience personally and professionally. We have amazing talent in this Bank and it is such a pleasure to work with folks from very diverse backgrounds. Also I think this organization is very meritocratic and rewards performance.

5. What are the challenges and opportunities in career mobility?
Coming from a corporate banking background and successfully transitioning into a private banker will require much focused and dedicated effort; I will need to educate myself quickly with Citi’s investment platform.

6. Who influenced your decision to move?
I was very much supported by Bob Mcguire (GMM Canada), John Grinney (my previous supervisor) and Kush Malhotra (my new supervisor). Their full support, encouragement and guidance has been of immense help and I hope it continues to be so.

7. Top 3 things you have learned from your career movement?
- Perseverance;
- Focused approach and being responsive to your clients needs; and
- Learn to work in a matrix environment.

8. From your experience, how does it relate to work-life balance?
I guess everyone finds their own balance in life. In the last two years, Citi has moved very quickly. It has been a very fast paced working environment and when I look back I am glad that these two years have professionally been very fulfilling for me.

9. Do you have any advice for your Citi colleagues?
Have confidence in your abilities, believe in team work and have a very focused approach.
WLDP Questions:

1. **What is the WLDP?**
The Citi Women’s Leadership Development Program is an outcome of Citi Women (formerly Women4Citi) and is in direct response to the stated need for a Leadership Curriculum for our female leaders. The 3-day program is offered through Global Workforce Diversity and Executive Development and taught in conjunction with the UCLA Anderson School of Management. It is designed to bring together a key group of female leaders for dialogue and learning around career development.

2. **What motivated you to participate in the WLDP?**
First, I was honored to have been selected to participate in the program. I viewed it as an excellent opportunity to meet women in similar stages of their careers from different areas of Citi and from around the globe. I also felt that I could benefit from the educational content around leadership development.

3. **What 3 things did you learn from the program?**
It is difficult to summarize only 3 things as there was so much that I learned from participating in this program. To summarize three:

   No matter where someone is from (the U.S., Russia, Singapore, South Africa, and so forth), we are all facing similar issues as women trying to balance our achievements and goals in the workplace with our personal relationships and families.

   There should be less focus on finding “the one perfect mentor”. Instead, look to build a “board of directors”, with a diverse group of individuals that may each contribute in different ways. In addition, return the favor and pay it forward.

   Women, in general, need to give up perfection and delegate more. Otherwise, we’ll never be able to move from the trees to the forest and take on true, strategic roles.
Women’s Board for the Goodman Theatre:

1. What is the organization? Describe your association with the program.
The Goodman Theatre is Chicago’s oldest and largest nonprofit theater and was named the nation’s “Top Regional Theatre” by Time magazine. I am a member of the Women’s Board of the Goodman Theatre, whose main purpose is to raise funds for the Goodman’s educational program.

2. How did you get started and why?
A business associate of mine was a member of the Women’s Board and asked if I would like to join. I thought it would be a great opportunity to meet more women in the Chicago community outside of where I was working. In addition, I thought it would offer a balance to my day to day financial business dealings by engaging with others to support the theatre and the related education programs.

3. What makes you continue your involvement? How is it special?
As I had expected when I joined, I have truly enjoyed the diversity of the women on the board and the personal relationships that I have built. In addition, the funds that we raise go to the educational programs of the Goodman, helping Chicago youth experience opportunities within the theater that they otherwise would not have access to.

4. What are 3 things you learned from joining the association?
• We should look to learn from women outside our workplace, even if they don’t technically “work”. I have a new appreciation for women who spend a significant amount of time volunteering on numerous boards.
• It is important to build a personal network outside of work and family.
• Take time to enjoy the arts!

5. How is your experience on how it relates to work-life balance?
As noted above, it is important to engage in activities that don’t relate directly to work and family.

6. Do you have any advice for your Citi colleagues?
Take time for yourself, although I also don’t follow this advice enough.
Bola Oyesanya describes her Diversity Leadership Program (DLP) experience

1. What is the DLP?
Diversity Leadership Program is a leadership development program for high-performing diverse professionals to increase and accelerate the development of a diverse pipeline of leaders across the ICG. It is a comprehensive program of coaching, informal mentoring, networking with seniors and training over a six-month time period.

2. What motivated you to participate in the DLP?
I was nominated by my Manager and HR Generalist.

3. What 3 things did you learn from the program?
• My nomination was a positive reinforcement that my contributions were valued and is an on-going motivation to continue producing at the highest levels.
• The individual coaching sessions were priceless; I was the agenda. The intensely focused attention on my development has been the best training I have had in my career.
• Having diverse colleagues from across ICG in the class expanded my network immensely and underscored the power of the Citi Franchise. Some of my classmates worked with clients in different parts of the world and some covered products that are used around the globe. I started my banking career in Nigeria where Citi is viewed as the benchmark for banking excellence, so meeting colleagues who work with clients across various countries, sectors and groups, reinforced Citi’s global footprint and fostered synergies and best practices that best serve our clients.

Jay Yost talks about the Reaching Out - MBA Conference

1. What is the Reaching Out - MBA Conference?
It’s an annual LGBT conference for MBA students and recent MBA graduates that includes initial interviewing by employers. In 2012 it was held in Boston on October 18-20, with over 1,100 in attendance. Citi was one of six Diamond Sponsors. This organization aims to share ideas for raising LGBT visibility, outreach and awareness on campuses across the country, as well as establishing and growing LGBT MBA student organizations.

2. What motivated you to participate in the Reaching Out - MBA Conference?
I was asked to speak on a panel that addressed how it is to be a gay Private Banker. Informally, our panel got voted most-likely-job-you-could-have-and-actually-have-a-good-time.

3. What 3 things did you learn from the program?
That I really do have a great job. That LGBT job fairs such as this are so attractive that straight people are showing up. And that Citi has a great group of LGBT employees who want to market Citi as an inclusive place to work.
Caroline Welling talks about the CIB mentoring program

1. Caroline, what prompted you to apply for the mentorship program?
I had been a mentee in another program at Citi a few years ago. Although my mentor and I had a good personal relationship, he was brand new to Citi and lacked insight into the organization. When I heard that another Mentorship Program was being planned I immediately expressed interest in being in the Pilot program.

2. What made the difference in the current program?
I think the application process was extremely helpful. The application asked in-depth questions about the mentee candidate and about what he or she expected to get out of the program. I had some very specific requests for what I was looking for in a mentor and I was pleasantly surprised to be matched with a mentor who met all of my criteria.

3. Tell us about your relationship with your mentor, Leslie Bains.
Leslie has been a great mentor - she took the time to really understand my background, not only professionally, but personally. We talked about work/life balance, the importance of networking, and getting involved in activities outside of work. Leslie has worked in the financial services industry for decades and hearing about her experiences at Citi and other firms was extremely beneficial. Leslie offered valuable insights into issues I was dealing with in my current position as well as offering her perspective on what types of roles would be appropriate for me in the future. Leslie was able to introduce me to people within the Private Bank who I had not met in person previously and I had the opportunity have in depth discussions with a GMM, a Private Banker, and a Banker Associate. We also worked together to improve my resume and make it more reflective of my accomplishments.

4. What would you say to anyone considering entering the mentorship program?
I would strongly encourage people who are in doubt to apply, even if a previous mentoring relationship was disappointing.

5. What changes have you made as a result of the mentorship program?
One of the things Leslie and I discussed was that I wasn’t getting involved in outside activities as much as I could, due to the long hours spent working. I joined the Academy of Finance and Enterprise Mentoring Program sponsored by Citi and I’m now the mentor to a 15 year old girl at the local high school in Long Island City. This is an incredibly rewarding experience and I’m finding ways to balance my heavy work load with the time commitment for this endeavor.
CPB Diversity VIDEO

Click here to view
Business Case for APAC

Ida Liu
Managing Director
Head, North America
Asian Clients Group
Citi Private Bank
North America

Insights and Inspirations: Ida Liu
January 2013

Ida Liu, Head of the North America Asian Clients Group, discusses why the group was formed, what constitutes a great team, and the lessons learned from launching the group.

Posted on January 15, 2013

CLICK HERE TO VIEW
Having meaningful discussions allows us greater insight into expectations, development needs, mobility opportunities, and succession planning. Throughout the year we all participate in a number of Performance Management processes to help facilitate these discussions including:

- **Goal Setting**
- **Individual Development Planning**
- **Mid-Year Performance Review**
- **Year-End Performance Review**

### HOW WE ACHIEVE

- **Business/Region/Function Strategy/Goals**
- **Individual Business- Goal Setting (Q1)**
- **Mid-Year Review (End of Q2/Early Q3)**
- **Ongoing Coaching, Feedback, Development & Recognition**
- **Year-End Review (Q4)**

---

Karen Powell
Global ICG Talent Lead
karen1.powell@citi.com
Performance Management is a dynamic process which includes the ongoing review of goals, coaching, development, feedback, and recognition throughout the year and is driven by the following guiding principles:

- Drive a culture of meritocracy, differentiating based on performance
- Manage performance against challenging goals
- Evaluate employees on how goals were achieved, not just end results
- Provide balanced feedback and direction regarding strengths and areas for development

This year, goal setting kicked-off in mid-February and will continue through the end of March.

**Goals**

Developing yearly goals is a critical step in ensuring that all employees clearly understand what is expected of them by what they achieve, how they achieve it, and how they contribute to our overall success.

When you set goals, you commit to performance outcomes that will be accomplished individually or in collaboration with your team and other partners. Goal setting supports the long-term direction of your business unit and, if done well, provides a continual line of sight and focal point for you and your manager. Individual development planning is vital in helping you and your manager determine where you need to build skills or improve behaviors in order to increase your performance effectiveness.

At this time, you should be preparing to meet with your manager and, if applicable, your direct reports, to set Specific, Measurable, Achievable, Relevant and Time-bound (SMART) goals that are aligned to those of your team and the overall business.

The Goals section of GTMS is intended primarily for business goals. Goals related to your personal and professional development should be reflected in your Individual Development Plan (IDP).

**Tips for Writing Business Goals**

Individual goals identify what key projects, responsibilities, and accomplishments you should focus on during the year. Ultimately, your goals should be aligned with the goals of the broader organization in which you operate. As business priorities evolve throughout the year, individual goals may need to be reviewed and revised.

“Our success is critically dependent on the talent we employ throughout our organization.”
Performance Management (con't)

Goals Should be SMART!

<table>
<thead>
<tr>
<th>Specific</th>
<th>A specific goal shows exactly what’s being focused on in your work.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Measurable</td>
<td>A measurable goal can be measured whether you increase by a % or not</td>
</tr>
<tr>
<td>Achievable</td>
<td>Achievable goals are realistically based on available resources, skill and environment</td>
</tr>
<tr>
<td>Relevant</td>
<td>Relevant goals are aligned with business objectives</td>
</tr>
<tr>
<td>Time-bound</td>
<td>Is there a realistic time frame to complete the goal</td>
</tr>
</tbody>
</table>

Examples of SMART Goals

• Deliver Plan Revenues while not exceeding Plan Expenses
• Improve Share of Wallet
• Maintain Discipline around Capital Targets - Meet Plan for both B3 RWA and GAAP assets
• Reduce Operational Loss events
• Optimize deployment of the firm’s balance sheet by reducing capital exposures to redzone clients

Tips Specifically for People Managers:

Key goal setting activities for people managers include:

• Communicating the importance of goal setting to your team, highlighting the many benefits of well-written goals, including:
  • Helping employees to prioritize time and effort
  • Aligning our business strategy across functions and roles
  • Ensuring everyone is clear about their individual objectives and contributions to team success
  • Motivating individuals to achieve by providing clear standards for performance

• Ensure your team is aware of all performance management deadlines, including when they should have goals documented within the system.
  • Goals should be documented no later than March 29. You should ensure the people managers who report to you do the same.
• Draft your own goals and publish or cascade them to your team. Once your direct reports have submitted their goals, meet with each one to review his/her goals and provide feedback based on the S-M-A-R-T criteria outlined above. These reviews should be completed no later than mid-April.
  • Review your direct reports’ goals at least quarterly to track progress and adjust for business needs or role changes, as appropriate.

Goals related to your personal and professional development should be reflected in your Individual Development Plan (IDP).
Tips for Writing Individual Development Plans

A critical part of having meaningful career discussions is having a complete and up-to-date Individual Profiles and robust Individual Development Plan. You can access your Individual Profile and your Individual Development Plan by clicking on Citi For You and clicking on “My Profile”.

When you update your development goals, leverage the six Leadership Standards intended to create a common understanding of what great leadership looks like at Citi. These Standards, along with the associated behaviors, serve as the building blocks for your development plan:

• Drives Client Value
• Leads Change
• Delivers Results
• Acts as an Owner
• Works as a Partner
• Builds Great Teams

• To learn more, please visit the Leadership Standards on Citi For You.

Take this opportunity to review your profile and development plan with your manager. Reflect on your strengths and development areas using the Leadership Standards to discuss the support you may need to accomplish your development goals.

For more information, please see your manager or Human Resources Generalist, or access the resources below.

Resources

To update your Individual Profile & Development Plan:
Go to Citi For You, Select My Performance and Feedback and click on My Individual Profile or My Development Plan in related links.

To access reference documents and training material:
Visit My Development Plan on Citi For You and go to Additional Resources.

To access last quarters Diversity E-book “Your Career Path” at Citi

When you update your development goals, leverage the six Leadership Standards intended to create a common understanding of what great leadership looks like at Citi.
Diversity Leadership Program (DLP):

2013 Class

Please congratulate the below Diversity Leadership Program participants. The participants went through a rigorous selection process and will enter a six-month leadership development program organized by the ICG Diversity Team in conjunction with Executive Coach Priscilla Douglas. For more information on the program, please refer to page 64 in the resource center.

<table>
<thead>
<tr>
<th>NAME</th>
<th>TITLE</th>
<th>MAJOR BUSINESS</th>
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</thead>
<tbody>
<tr>
<td>Valerie Dixon</td>
<td>VP</td>
<td>CIB</td>
</tr>
<tr>
<td>Jyothi Narayanan</td>
<td>VP</td>
<td>CIB</td>
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<tr>
<td>Richard Rivera</td>
<td>VP</td>
<td>CIB</td>
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<tr>
<td>Lauren Abrahamzadeh</td>
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<td>Jose Alvarez</td>
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<td>Melissa Aylor</td>
<td>VP</td>
<td>Citi Markets</td>
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<tr>
<td>Gregory (Mikhael) Edouard</td>
<td>SVP</td>
<td>Citi Private Bank</td>
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<td>Sabrina Huffman</td>
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<td>Kamran Sadr</td>
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<td>Michelle Tillery</td>
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<td>Angela Yue</td>
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<td>Erin Lyons</td>
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<td>Jaime Moore</td>
<td>DIR</td>
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<tr>
<td>Vikram Rai</td>
<td>VP</td>
<td>Citi Research</td>
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<tr>
<td>Anthony (Tony) Yuen</td>
<td>DIR</td>
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<tr>
<td>Ashu Bhatnager</td>
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<td>Rachel Brown</td>
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<td>Reginia Brown</td>
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<td>Jacqueline Doyle</td>
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<tr>
<td>Nithin Johnson</td>
<td>VP</td>
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<tr>
<td>Brendalis (Brenda) Lee</td>
<td>VP</td>
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<tr>
<td>Katherine McGowan (Lukas)</td>
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<td>Cyrus Mistry</td>
<td>VP</td>
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<tr>
<td>Rosa Maria Rodriguez</td>
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## 2012 Awards & Recognition

Citi recognizes its commitment to fostering a diverse workforce representing our communities and clients. Particularly rewarding is the acknowledgment we receive by leading diversity publications. We are pleased to announce that Citi has recently won the following awards and recognitions:

<table>
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<th>Award</th>
<th>Link</th>
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Note: This list is not meant to be a comprehensive listing of all diversity awards received by Citi. It is a representative sample. Please note that these links will take you to an external website. These links are provided as a service to Citi colleagues, and Citi neither controls nor guarantees the accuracy, timeliness, or completeness of the information contained in non-Citi website links. Citi neither endorses nor guarantees the external organizations, services, advice, or products included in these external site links.
INTERNATIONAL WOMEN’S DAY

March 7, 2013

CLICK HERE TO VIEW

The Office of ICG Diversity hosted an event featuring The National Council for Research on Women (NCRW) and Dr. Julianne Malveaux. The purpose of the event was to discuss NCRW's newly released report on strategies for retaining and advancing women of color.
The ICG Office of Diversity hosted an event in recognition of Disability Awareness Month in October. Featured speaker, Carlos Leon, a U.S. Track & Field Paralympian and former Veteran of the U.S. Marines, was injured in a diving accident and sustained a broken neck and impairments in all four limbs. Thanks to a life-altering conversation with five-time Paralympian Gabe de Leon, Carlos began training rigorously in field events, including discus, and set off on a path that would eventually take him to the 2008 Beijing Paralympic Games.

In 2012, Carlos was a second-place finisher in discus at the U.S. Paralympics Track & Field Trials and served as a Games-Time Ambassador for Citi’s Every Step of the Way program in London. He also partnered with Citi to raise much-needed funds for the U.S. Paralympics’ Warrior Games initiative, an annual competition among wounded, ill and injured servicemen and women from all branches of the military.
On October 9, the Citi Women’s Global Network subcommittee hosted Futurist and best-selling author of The Popcorn Report and EVEolution, Faith Popcorn. Popcorn shared her thoughts on the global ascension of female power and values based on women controlling $12 trillion of the economy and two thirds of the world’s consumer spending. Popcorn framed this widespread shift as The SHE-CHANGE and predicted that by the end of the decade there will be more businesses started by women than men.

The event also featured senior leader panelists Maria Hackley, Ida Liu and Michelle Peluso, who shared best practices on how women can harmonize their effectiveness in the workplace and in their personal lives, and how Citi’s strategy serves our female customers.
ICG Office of Diversity, in partnership with the Council of Urban Professionals (CUP) presented “The Asian American Pacific Islander Forum.” The discussion was led by Julie Chang, Entertainment Reporter for WNYW/Fox 5 News along with a panel of senior executives – Atul Dubey, COO of Securities and Fund Services, Citi; Partha Bose, Chief Marketing Officer of Oliver Wyman; and Ripa Rashid, Vice President of Global Workforce Diversity and Inclusion at Time Warner.

The conversation focused on some of the challenges that Asian American professionals may face in the workplace, due to cultural differences, and strategies on how to overcome these challenges. Much of the discussion highlighted research that was conducted by Ripa and the Center for Talent Innovation entitled “Asians in America – Unleashing the Potential of the Model Minority.”
Institutional Clients Group Firm Meeting

CLF: Muhtar Kent, Chairman of the Board, Chief Executive Officer and President Coca-Cola Company

May 2012

CLICK HERE TO VIEW
ICG Office of Diversity, along with Deloitte LLP and Catalyst presented “The Myth of the Ideal Worker.” The discussion was led by Dr. Meryle Kaplan from Catalyst along with a panel of senior executives from Citi – Suni Harford, Regional Head of Markets for North America and Sam Di Piazza, Vice Chairman in the ICG and member of the Senior Strategic Advisory Group; as well as Deloitte’s, Bob Contri, US Financial Services Industry leader and Vice Chairman, and Evelyn Heinbach, Director and member of Deloitte’s Citi account team.

The research uncovered some interesting findings about the strategies that men and women employ to get ahead in their respective careers. The research also discusses solutions for companies to consider when sourcing talent from unexpected places.

To view the Powerpoint presentation, CLICK HERE.
NON-PROFIT BOARD SERVICE

December 1, 2011

CLICK HERE TO VIEW

The ICG Office of Diversity in partnership with the Council of Urban Professionals and The Robin Hood Foundation, presented “Building a Diversity of Experience through Non-profit Service” to discuss the value of serving on non-profit Boards and tips on raising your profile. The discussion featured David Saltzman, Executive Director – Robin Hood Foundation; Bridget Fawcett, Managing Director, Global Banking – Citi; Stephanie Mann, Director, Global Banking – Citi; Luis Penalver, Partner – Cahill Gordon & Reindell LLP; and Gregg Walker, Senior Vice President, Corporate Development – Sony Corporation who all serve on non-profit boards.

Gaining Board experience is a great way for employees to broaden their skill set as well as lend their current talents to serving on the Board of a non-profit organization.

McKinsey & Company undertook this research to understand how women contribute to the U.S. economy; how their work benefits individual corporations; what prevents women from making greater contributions to their companies; and what approaches can help companies unlock the full potential of women.
GLSEN: Bullying – The Impact on Our Workforce featuring the Gay, Lesbian and Straight Education Network
February 2011
CLICK HERE TO VIEW

A MOMENT IN HISTORY: Celebrating the Tuskegee Airmen
February 2011
CLICK HERE TO VIEW
A panel discussion featuring Ralph de la Vega (AT&T’s President of Consumer and Mobility) and Cindy Brinkley (Former Chief Diversity Officer and Head of Talent, AT&T), as well as Jonathan Simon and Mike Rollins from Citi.

Ralph has a phenomenal story of overcoming adversity throughout his life – whether it's his story of being sent to the U.S. from Cuba to live without his parents at the age of ten to leading AT&T through several “pivotal” points in a rapidly changing industry. His learnings on leadership and navigating his career are incredibly insightful and relevant for anyone in business. Additionally, he is at the forefront of driving diversity and inclusion at AT&T, as a senior leader in their organization. Cindy Brinkley will share her insights on diversity as a driver of innovation as well as her views on the changing workplace and talent management.
Attracting Talent

DIVERSITY RECRUITING TEAM
Undergraduate & Graduate

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TIFFANY HARRISON
Reruiter, Diversity Recruiting					
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At Citi, we embrace diversity.
We are committed to hiring diverse talent, including those from historically underrepresented groups in the financial services industry. Our Graduate Recruitment team works diligently on university campuses and with external diversity partners to recruit high-achieving people who are minority, women, veterans, gay, lesbian, bisexual, transgender and with disabilities. Our ultimate goal is to ensure all of our employees have an equal opportunity to achieve their professional and personal goals.

Diversity Partners and Conferences
To learn more about the organizations with which Citi partners to recruit top diverse talent in the United States for its various training programs, please click on the links below for more information.

Undergraduate Diversity Partners
- Inroads
- Management Leadership for Tomorrow (MLT)
- Sponsors for Educational Opportunity (SEO)
- Prep for Prep
- The Posse Foundation

MBA Diversity Partners
- Forte Foundation
- Management Leadership for Tomorrow (MLT)
- Robert Toigo Foundation
- The Consortium

Diversity Conference Partners
In addition to a series of on-campus conferences that Citi will be participating in during the upcoming recruiting season, we will be attending the following national conferences:

- Forte MBA Women’s Conference
- The Consortium Orientation Program and Career Forum
- MBA Jumpstart
- Out for Undergraduate Business Conference
- National Black MBA Conference
- National Society of Hispanic MBAs Conference
- Reaching Out LGBT MBA Conference
- MBA Veterans Career Conference

Please note that these links will take you to an external website. These links are provided as a service to Citi colleagues, and Citi neither controls nor guarantees the accuracy, timeliness, or completeness of the information contained in non-Citi website links. Citi neither endorses nor guarantees the external organizations, services, advice, or products included in these external site links.
ICG SOARS Program

The ICG Sophomore Orientation and Accelerated Recruiting Scholars (SOARS) Program was developed to provide exceptional minority sophomore students (women, lesbian, gay, bisexual, transgender, military veterans, people with disabilities, and people of Black and Latino/Hispanic descent) with a 10-week summer internship in New York City and financial support from the firm. Successful Sophomore Analysts that wish to return as part of the Junior Summer Analyst Program (placement will be based on personal interest and the needs of the firm) will receive an award of $7500.

Structure of the Program:
• Ten-week paid internship
  – One-week Citi orientation and training
  – Nine-week direct placement within one of the Institutional Clients Group Analyst programs (Corporate & Investment Banking, Markets and Transaction Services)
• A formal summer review process including a mid-summer and a final summer evaluation

Qualifications:
• Sophomore currently enrolled in a 4-year Baccalaureate Degree program from an accredited institution
• Open to all disciplines and majors
• All candidates are selected based on their academic achievements, extracurricular activities, campus leadership, and interest in the financial services industry
• GPA: 3.3 or above
• Compensation: Competitive
• Location(s): New York, NY
• Must be authorized to work in the United States and must not require sponsorship for employment visa status (This is a program for which we will not sponsor individuals for work authorization.)

How to Apply:
To be considered for the ICG SOARS Program, all students must apply through Citi’s website at www.oncampus.citi.com:
• Under Vacancy criteria, select U.S.
• Institutional Clients Group
• Summer Analyst
• SOARS Program

Application Deadline:
• All students must apply online at www.oncampus.citi.com by Friday, November 1, 2013.
ICG MBA Fellowship

As part of Citi's commitment to recruiting high-caliber talent and in accordance with our Diversity Recruiting Mission Statement, Citi Institutional Clients Group (ICG) is proud to sponsor the Citi ICG MBA Fellowship. The program will provide exceptional minority First-Year MBA students (women, lesbian, gay, bisexual, transgender, military veterans, people with disabilities and people of Black and Latino/Hispanic descent) with an opportunity to join the Institutional Clients Group (ICG) with financial support from the Firm.

**Fellowship Opportunity:**

- A paid summer opportunity in one of the Institutional Clients Group Associate programs during the period between the first and second years of business school
- A $25K stipend for the first year of business school (a portion may be taxable)
- An opportunity to receive an additional $25K stipend for the second year of business school, after successful completion of the summer internship and an accepted offer to join the firm full-time
- A required three-year commitment to continue work in ICG post-MBA completion

**Qualifications:**

- Competitive GMAT scores
- Endorsement letter from a Professor or Manager
- Personal essay
- Resume
- GPA 3.2
- Must be authorized to work in the United States
- Must not require sponsorship for employment
- Acceptance and intention to attend one of the MBA programs from which ICG recruits or which is affiliated with our diversity partners

**How to Apply:**

To be considered for this Program, all students must apply through Citi’s website at www.oncampus.citi.com:

- Under Vacancy criteria, select U.S.
- Institutional Clients Group
- Summer Associate
- ICG MBA Fellowship

**Application Deadline:**

- All students must apply online at www.oncampus.citi.com by Friday, June 14, 2013.
The North America Recruiting team is committed to diversity hiring and increasing the talent pool with ethnic minorities, women, veterans, lesbians, gays, bisexuals, transgendered people and people with disabilities.

Our value proposition is built upon a consultative and cutting-edge strategy for talent acquisition, uniquely led by experienced recruiting professionals with both extensive corporate and search firm backgrounds. For hiring managers, our aim is to aid in the growth of the ICG businesses by utilizing sophisticated resources, innovative technology, and a vast network of professional contacts in the financial services industry. The recruiting team takes a proactive approach to the business hiring strategy, working closely with management and HR to leverage and complement shared information to ensure optimal results.

For employees seeking internal mobility, we have developed a robust career search engine that provides targeted search capabilities.

Click here for your next opportunity.

Managing Your Career

Tips on Evaluating Your Next Career Move:
It is important to be aware of what you really want to be doing career-wise, regardless of the length and level of your career.

Some factors that you might want to consider are:
- What are your business interests?
- Do you like working alone or on a team?
- How important is the social aspect of work?
- How large of a role does money play?
- How important is it to you that your skill set, such as being detail oriented, is utilized to its highest potential?
- How does your location and commute affect you?
- What kind of work/life balance do you require?
- How important are titles and recognition to you?

Tips on informational interviews:
An informational interview is a “real” interview. There are five areas that you should fully prepare for before scheduling a meeting.

1. Approach – Your approach is critical to secure a meeting with the desired party. Your time is valuable to you. Don’t forget that the interviewer is doing you a favor by giving up their time to meet you.

2. Reason for Meeting – Be sure you can articulate your career goals and interests. Take some time to ask yourself why you are setting up this informational interview. If you cannot come up with a concrete answer, you should seek the advice of a career counselor/mentor/manager.

3. Questions – Formulating a specific set of questions that will help you gain the knowledge you are seeking is crucial to making the interview worthwhile. This will also demonstrate you are taking the interviewer’s time seriously.

4. Dress Code – Be sure you are dressed appropriately and professionally.

5. Follow Up – Don’t forget a thank you note or e-mail is also a reminder of your interest.
Recruiting

ICG NAM Recruiting Team

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Ashley Kalberer  
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Director, Recruiting Group Manager, ICG & Global Functions  
Jeff.holbrook@citi.com

Seth Welty  
SVP, Diversity Recruiting Manager  
Seth.p.welty@citi.com

Stephanie Tam McMillan  
VP, Executive Recruiter  
Stephanie.tam.mcmillan@citi.com

Citi NAM Recruiting Team

Diversity and Inclusion in the ICG

ATTRACTING TALENT

---
In today’s challenging marketplace, it is essential to hire and retain the most talented and qualified employees.

The firm’s objective is to have the best team in the industry and we want your help in establishing a workforce of skilled, dedicated, team-oriented and client-focused individuals.

By referring qualified external candidates for open U.S.-based, full-time positions, you can possibly receive an award as our way of saying, “Thank you for your help in making our business stronger.”

**Employee Referral Program Awards**

All Employee Referral awards are taxable income

<table>
<thead>
<tr>
<th></th>
<th>Exempt</th>
<th>Nonexempt</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global Functions</td>
<td>$5,000</td>
<td>$3,000</td>
</tr>
<tr>
<td>ICG</td>
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<td>$3,000</td>
</tr>
<tr>
<td>Ops &amp; Tech</td>
<td>$5,000</td>
<td>$3,000</td>
</tr>
<tr>
<td>– Enterp Ser Ops</td>
<td>$5,000</td>
<td>$3,000</td>
</tr>
<tr>
<td>– ICG Ops</td>
<td>$5,000</td>
<td>$3,000</td>
</tr>
<tr>
<td>– Consumer IT</td>
<td>$5,000</td>
<td>$3,000</td>
</tr>
<tr>
<td>– Enterp Serv IT</td>
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<td>$3,000</td>
</tr>
<tr>
<td>– ICG IT</td>
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</table>

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<th>CIS+</th>
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<tbody>
<tr>
<td>Consumer</td>
<td>$5,000</td>
<td>$3,000</td>
<td>$500</td>
</tr>
<tr>
<td>Holdings</td>
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<td>$500</td>
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<tr>
<td>Ops &amp; Tech</td>
<td>$5,000</td>
<td>$3,000</td>
<td>$500</td>
</tr>
<tr>
<td>– Consumer Ops</td>
<td>$5,000</td>
<td>$3,000</td>
<td>$500</td>
</tr>
</tbody>
</table>

Note: Non-exempt employees are overtime eligible.

**To Make an Employee Referral**

1. Go to the internal or external website and click on the position for the referral.
2. Next, click on the “Refer a friend” button at the bottom of the page and follow the directions.
3. Once you complete the online referral form, your referral will receive an invitation to apply online via e-mail.
4. When your referring candidate applies online, he/she must indicate that the recruiting source is an employee referral.
5. If your referring candidate is invited in for an interview, you must instruct them to write your name in the “Referred by” section on the employment application.

Note: If you do not have access to the Career Mobility website, follow steps 4-5.
The Employee Referral Program is open to all U.S.-based employees of Citi. This program applies to external hires for full-time positions in the U.S.

- Employees are **not** eligible to receive a referral award, if they are:
  - An HR employee in a Recruiting function
  - An Officer at or above the Director/C15 level
  - The hiring manager and/or anyone directly involved in the interview process

- The following referrals are ineligible for an Employee Referral Award:
  - Former employees who were previously employed by Citi within the past 12 months
  - The conversion of staff, contractors, or consultants to full-time employment
  - Current Citi employees
  - Recent college graduates with one year or less of related work experience, unless the position is identified as award eligible
  - All hires made through any of the Campus Programs

- To be eligible for a referral award, both the referring employee and the newly hired employee must be employed by Citi for a minimum of 90 days after the referral's start date and have a payroll designation of active employment status at the time of payout.

- To be eligible for a referral award, the referred employee must indicate the referring employee's full name on the employment application.

- All awards will be direct cash awards and will be subject to all applicable federal and state taxes.

- If more than one employee refers a candidate, the referral fee will be paid to the referring employee whose name is provided by the referred candidate on the application or to the referring employee whose full name is listed first on the application.

- If a referred candidate does not accept a job offer, the referred candidate's resume will continue to be accessible online for one year from the date of submission.

- A referred candidate's resume will remain valid for one year.

- Payout for a referred candidate will expire after one year.

- The Program and payouts will continue to be administered by the Recruiting function.

- All referral awards are paid out in accordance with the specific program for the business in which the vacancy exists.

If you have any questions regarding the program, feel free to contact your manager or HR/Recruiting Representative.
Work environment
Citi Employee Networks

What are the Citi Employee Networks?
Created in 2002, the Citi Employee Networks are composed of affinity groups initiated and led by employees. The Networks are open to all employees and provide a wide variety of activities to assist the company in recruiting and retaining talent, celebrating ethnic, cultural and community diversity, and providing professional and personal development information to their members. Since inception, the Employee Networks have grown to over 60 networks and 15,000 members across the United States, Canada, the Republic of Ireland and the United Kingdom.

What are the primary objectives of the Citi Employee Networks?
The Employee Networks focus on diversity groups that provide their members with an opportunity to share common experiences and build awareness of diverse cultures and communities. Primary objectives include:

**Professional Development:** Activities to foster networking among members; developmental opportunities through events such as: guest speakers; panel discussions; and partnerships with the local training and/or organizational development departments of one of the businesses.

**Community Outreach:** Support of existing Citi community outreach programs such as March of Dimes or Habitat for Humanity, as well as new opportunities for volunteer partnerships within the local community identified by the network and approved by the local community relations office.

**Cultural Education & Awareness:** Forging partnerships with the local Citi businesses to assist with the planning and implementation of heritage month celebrations; communicating significant local cultural events to the membership; being available to the business as a resource to support recruitment and retention initiatives; and assisting in the business marketing within the community.

**Attracting and Retaining Talent:** Working with recruiting teams to assist with the hiring of diverse talent by supporting targeted graduate recruitment strategies and being available to the business as a resource to support retention initiatives.

What affinities are available?
- African Heritage
- Asian Heritage
- disABILITY (focused on people with disabilities and the caregivers of people with disabilities)
- Hispanic Heritage
- Military Veterans

- Pride (focused on lesbian, gay, bisexual and transgender communities)
- Roots (multicultural)
- Women
- Working Parents

How do I learn more?
Go to [http://www.citigroup.net/diversity/ceng.htm](http://www.citigroup.net/diversity/ceng.htm)
Citi Diversity celebrates you.

Citi employees are as diverse as the customers they serve – across 100 nations and six continents. That’s why we’ve created Citi Diversity – a range of affinity groups designed to ensure every one of our employees feels supported, enabled to reach their full potential and better empowered.

A positive approach to diversity doesn’t just make for a happier team. It’s also a key driver of business advantage. A diverse workforce understands clients better. They can be more creative and innovative on their behalf. And this can drive greater market share for Citi – and better returns for investors.

We combine this strict internal accountability with the external accountability that comes from working with outside organizations with a track record of fostering diversity and inclusion. We also use Diversity Councils to share best practices and align policies across every office, in every time zone across the globe.

That’s why Citi develops annual diversity plans. And holds businesses and managers directly accountable for fulfilling them. Diversity reviews are held quarterly – and senior management compensation is directly linked to their ability to deliver on diversity.
Citi Diversity focuses on six key areas.

<table>
<thead>
<tr>
<th>Networks</th>
<th>Gender</th>
<th>Parenting</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>We are committed to being a company where men and women want to spend their careers; where opportunities to develop are widely available; where innovation and an entrepreneurial spirit are valued; and where a healthy work/life balance is encouraged. At Citi, we provide a forum for exploring gender-related experiences in the workplace.</td>
<td>Planning for and raising children is challenging and rewarding, especially for working parents. That’s why Citi provides a forum for all Citi employees to exchange ideas, share information and offer support for all the different stages and variety of experiences that parenthood encompasses.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Veterans</td>
<td>Heritage</td>
</tr>
<tr>
<td></td>
<td>Citi honors and respects those who have served their country. We provide a forum for all Citi employees to cultivate awareness, provide opportunity for networking and promote the exchange of ideas among those who have an interest in past, present or future military service.</td>
<td>Over the course of our nearly 200-year history, Citi has been built and shaped by the diversity of our workforce. Our employees represent the local cultures and ethnicities in the more than 100 countries where we have a presence. Our diversity is a competitive advantage, and we provide a forum to showcase and celebrate the achievements, dynamic history and rich cultural heritage of our employees.</td>
</tr>
<tr>
<td></td>
<td>disAbility</td>
<td>Pride</td>
</tr>
<tr>
<td></td>
<td>Citi believes in empowering all employees. We provide a forum to discuss, facilitate and inform those in the workplace about the experiences shared by people with disabilities and/or their caretakers.</td>
<td>At Citi, we believe in promoting awareness and inclusion for all lesbian, gay, bisexual and transgender (LGBT) employees by embracing diversity and valuing all contributions to corporate and business objectives regardless of sexual orientation, gender identity or expression. We provide a forum for Citi employees with an interest in topics relevant to the LGBT community related to networking, professional development and community.</td>
</tr>
</tbody>
</table>
What is Citi Work Strategies (CWS)?

- Citi Work Strategies (CWS) is a nontraditional approach to the workplace on how, when and where people work and respond to new business contexts and work/life balance.
- Mobility empowers employees to determine their work schedule & location based on their client, company & personal needs, e.g., working from a client site, while commuting or from home.
- CWS enables employees to have the ability to move from location to location, choosing the most appropriate workspace to help them achieve their goals.
- CWS encompasses employee-initiated requests as well as business-initiated projects.

What are the primary objectives of the Citi Work Strategy program?

**Employee Benefits**

- **Enhanced work/life balance and effectiveness** – Improves the overall satisfaction of participating employees by allowing them to work at a time and location most convenient to them while still performing their job responsibilities seamlessly.
- **Employee agility** – Supports current work styles by providing a work environment that enables employees to remain effective, with access to all technology needs, regardless of physical location.

**Organizational Benefits**

- **Increased attraction and retention of talent** – Supports Citi’s goal as an employer of choice, and supports the company's efforts to attract and retain top talent.
- **Real estate optimization** – Facilitates the continual enhancement of physical real estate needs by implementing space solutions to support an agile workforce to realize savings associated with reduced real estate costs.
- **Business Continuity** – Allows for the continuity of business when a facility is closed due to inclement weather or building operational difficulties.
What are the flexible work schedules?

- **Flex time**: Employee works “core hours” with either early or late beginning/ending of the workday
- **Compressed Workweek**: Employee works longer scheduled days, working fewer days per week than the standard workweek
- **Job Sharing**: Two employees share the job responsibilities of one full time role
- **Part-time or Reduced Schedule**: Employee works less than a full time workweek
- **Remote**: Employee works part or all of their workweek from a remote location other than a primary Citi work location

What are the work styles?

- **Flex Resident**: Employee works remotely zero to one day per week and/or has a flex schedule
- **Agile**: Employee works remotely two to four days per week and may spend “in-office” time in different Citi locations
- **Telecommuter**: Employee works remotely five days per week

How do I learn more?

Go to [http://hr.solutions.citigroup.net/CWS/Static/Home.aspx](http://hr.solutions.citigroup.net/CWS/Static/Home.aspx)
Backup Child Care

Citi's backup child care centers provide employees with a safety net for those days when regular arrangements fall through. Backup care supplements, rather than replaces, normal care arrangements and is a comforting emergency alternative when you need it the most. These programs have been designed and are managed to provide high-quality backup care with staff specially trained to make you and your child feel at ease in an engaging and friendly environment.

Bright Horizons Backup Care Centers

In addition to the dedicated backup child care centers listed below, Bright Horizons provides backup child care to Citi employees on a space-available basis within the Bright Horizons network of more than 300 community-based centers across the U.S. For more information on Bright Horizons backup child care center, please visit the Bright Horizons website or call 877-BH-CARES (877-242-2737).

Citi Directory

<table>
<thead>
<tr>
<th>Center Name</th>
<th>Location</th>
<th>E-mail Address</th>
<th>Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Citi Dedicated Full-Service Centers</td>
<td>Hagerstown, MD</td>
<td><a href="mailto:ctb.ha@brighthorizons.com">ctb.ha@brighthorizons.com</a></td>
<td>14629 Citicorp Drive, Hagerstown, MD 21742</td>
</tr>
<tr>
<td>Citi Family Center</td>
<td>Jacksonville, FL</td>
<td><a href="mailto:ctb.jax@brighthorizons.com">ctb.jax@brighthorizons.com</a></td>
<td>14000 CitiCards Way, Jacksonville, FL 32258</td>
</tr>
<tr>
<td>Citi Family Center</td>
<td>Kansas City, MO</td>
<td><a href="mailto:ctb.kc@brighthorizons.com">ctb.kc@brighthorizons.com</a></td>
<td>7925 NW 110th St., Kansas City, MO 64153</td>
</tr>
<tr>
<td>The Family Center at Las Colinas</td>
<td>Irving, TX</td>
<td><a href="mailto:lascolinas@brighthorizons.com">lascolinas@brighthorizons.com</a></td>
<td>600 E. Las Colinas Blvd., Ste 150, Irving, TX 75039</td>
</tr>
<tr>
<td>Citibank Family Center</td>
<td>Las Vegas, NV</td>
<td><a href="mailto:ctb.lv@brighthorizons.com">ctb.lv@brighthorizons.com</a></td>
<td>2720 Crystal Water Way, Las Vegas, NV 89117</td>
</tr>
<tr>
<td>Child Care Center at Citibank</td>
<td>San Antonio, TX</td>
<td><a href="mailto:citig.sat@brighthorizons.com">citig.sat@brighthorizons.com</a></td>
<td>100 Citibank Dr. #4, San Antonio, TX 78245</td>
</tr>
<tr>
<td>Citibank Family Center</td>
<td>Sioux Falls, SD</td>
<td><a href="mailto:ctb.sf@brighthorizons.com">ctb.sf@brighthorizons.com</a></td>
<td>4800 North 4th Avenue, Sioux Falls, SD 57104</td>
</tr>
<tr>
<td>Citigroup Family Center</td>
<td>Tampa, FL</td>
<td><a href="mailto:ctb.ta@brighthorizons.com">ctb.ta@brighthorizons.com</a></td>
<td>3701 Queen Palm Drive, Tampa, FL 33610</td>
</tr>
</tbody>
</table>

Citi Dedicated Backup Centers

<table>
<thead>
<tr>
<th>Center Name</th>
<th>Location</th>
<th>E-mail Address</th>
<th>Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Citi Children's Center at 388 Greenwich</td>
<td>New York, NY</td>
<td><a href="mailto:citi388@brighthorizons.com">citi388@brighthorizons.com</a></td>
<td>388 Greenwich Street, 3rd Floor, New York, NY 10013</td>
</tr>
<tr>
<td>The Citi Children's Center at 399 Park</td>
<td>New York, NY</td>
<td><a href="mailto:citi399@brighthorizons.com">citi399@brighthorizons.com</a></td>
<td>399 Park Avenue, Level A, New York, NY 10043</td>
</tr>
<tr>
<td>The Citi Children's Center at Warren</td>
<td>Warren, NJ</td>
<td><a href="mailto:citi.nj@brighthorizons.com">citi.nj@brighthorizons.com</a></td>
<td>283 King George Road, Warren, NJ 07059</td>
</tr>
</tbody>
</table>
Backup Child Care Fact Sheet

The Citi Children’s Centers

Location
The Citi Children’s Center at 388 Greenwich
388 Greenwich Street, New York, NY 10013
212-816-7700 (phone), 212-816-7727 (fax)
E-mail: citi388@brighthorizons.com
Website: www.brighthorizons.com/citi388

The Citi Children’s Center at 399 Park
399 Park Avenue, New York, NY 10043
212-793-4000 (phone), 212-793-4001 (fax)
E-mail: citi399@brighthorizons.com
Website: www.brighthorizons.com/citi399

The Citi Children’s Center at Warren
283 King George Road, Building C, Warren, NJ 07059
908-563-8700 (phone), 908-563-8710 (fax)
E-mail: citi.nj@brighthorizons.com
Website: www.brighthorizons.com/citiwarren

Days of Operation
Monday – Friday (Please consult the High Demand Calendar for peak day schedules)

Hours of Operation
7:00 a.m. – 6:00 p.m. (388 Greenwich)
8:00 a.m. – 6:00 p.m. (399 Park & Warren)

Ages Served
6 weeks through 12 years

Eligibility
All legal dependents of Citi benefits-eligible employees. Each child is eligible for up to 20 days of care per calendar year.

Registration
To register call the customer contact center at 877-BH-CARES or register online at http://backup.brighthorizons.com (username: citi / password: group.) To receive registration materials contact the center by mail, fax or e-mail. Your child must be registered before using the center.

Reservations & Tours
- Please contact the center to arrange a tour.
- Reservations can be requested via the center’s 24-hour automated voicemail system, via e-mail or online at http://backup.brighthorizons.com (username: citi / password: group).
- Reservation requests made to the center between 6:00 p.m. and 9:00 p.m. will be confirmed by 9:00 p.m. Requests made after 9:00 p.m. will be confirmed the following morning.

Co-Pay
$30 co-pay per child per visit with a $50 family maximum per visit.

Lunch/Snacks
Parents provide lunch. Bright Horizons provides two nutritious snacks.

Additional Programs
- Infant Transition Care for parents returning to work after having a baby. Employees are allotted up to 20 additional days of care for infants up to 12 months of age.
- Other programs include Summer Advantage, Potty Camp, Sibling Transition, Parent’s Night Out and Homework Help.
- For more information, please contact the center of your choice listed above.
What’s a DOC?

DOC stands for Diversity Operating Committee. It is recommended that all major businesses in the ICG have an active Diversity Operating Committee or a senior manager who sits on the ICG-DOC. The role of the committee will be to implement programs, practices, etc. in support of the ICG’s diversity goals and objectives. The formation of these committees will ensure that we continue to work on diversity activities in the businesses. Each committee should have a mission statement along with goals and objectives that are in line with the ICG diversity goals and objectives. These goals and objectives should be reviewed on a yearly basis.

Who’s on a DOC?

Each Diversity Committee should have at least one Senior Business Head, one HR representative and the remainder of the committee should be a representative diverse set of employees from the business. The Senior Business Head or the committee chair drives the agenda for the committee with the assistance of the HR generalist. A member of the ICG Diversity Team is aligned with each DOC as a subject matter expert and communication liaison.

Who are the current DOC Leaders?

<table>
<thead>
<tr>
<th>Business</th>
<th>Name</th>
<th>Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Banking</td>
<td>Wes Walraven</td>
<td>Co-Chair</td>
</tr>
<tr>
<td>Banking</td>
<td>Sara Schwerin</td>
<td>Co-Chair</td>
</tr>
<tr>
<td>Banking</td>
<td>Nimesh Udeshi</td>
<td>HR Representative</td>
</tr>
<tr>
<td>Markets</td>
<td>Suni Harford</td>
<td>DOC Head</td>
</tr>
<tr>
<td>Markets</td>
<td>Roland Wikstrom</td>
<td>Co-Chair</td>
</tr>
<tr>
<td>Markets</td>
<td>Ellen Mathias</td>
<td>Co-Chair</td>
</tr>
<tr>
<td>Markets</td>
<td>Sara Zobel</td>
<td>HR Representative</td>
</tr>
<tr>
<td>Markets/Municipals</td>
<td>Maureen McCann</td>
<td>Co-Chair</td>
</tr>
<tr>
<td>Markets/Municipals</td>
<td>Erik Hall</td>
<td>Co-Chair</td>
</tr>
<tr>
<td>CTS</td>
<td>Barton Hill</td>
<td>Co-Chair</td>
</tr>
<tr>
<td>CTS</td>
<td>Cynthia Evans</td>
<td>HR Representative</td>
</tr>
<tr>
<td>Research</td>
<td>Jonathan Rosenzweig</td>
<td>DOC Head</td>
</tr>
<tr>
<td>Research</td>
<td>Kerry Buckley</td>
<td>HR Representative</td>
</tr>
<tr>
<td>Private Bank</td>
<td>Tracey Warson</td>
<td>DOC Head</td>
</tr>
<tr>
<td>Private Bank</td>
<td>Robyn Burger</td>
<td>Co-Chair</td>
</tr>
<tr>
<td>Private Bank</td>
<td>John Yost</td>
<td>Co-Chair</td>
</tr>
<tr>
<td>Private Bank</td>
<td>Gladys Chen</td>
<td>HR Representative</td>
</tr>
</tbody>
</table>
How do I get involved?

Participation in the DOC across ICG varies; engagement ranges from nomination/appointment by senior leadership in the business to volunteering. Please check with your DOC on how to get involved.

<table>
<thead>
<tr>
<th>Senior Business Head Roles and Responsibilities</th>
<th>HR Generalist Roles and Responsibilities</th>
<th>Profile/Role of Committee Members</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Participate in the committee by periodically attending meetings and giving direction to the team</td>
<td>• Participate in committee meetings</td>
<td>• The business can decide what level of staff should participate in the committee. The business should keep in mind that people on the committee should reflect a diverse population and be a positive influence in the organization</td>
</tr>
<tr>
<td>• Champion and communicate programs, process and success stories to their respective organizations and the Diversity office</td>
<td>• Assist the committee with program design, execution and alignment with the ICG diversity goals</td>
<td>• Suggested performance rating of 1 or 2</td>
</tr>
<tr>
<td>• Determine, jointly with the Diversity office, how success will be measured and tracked</td>
<td>• Ensure that HR policy and practices are being followed</td>
<td>• Suggested tenure with the firm at least one year</td>
</tr>
<tr>
<td>• In conjunction with HR, make nominations for the ICG-DOC membership</td>
<td>• Suggest other ideas and communicate information and activities from the ICG-DOC</td>
<td>• Can be self-selected or volunteered – either away the SR Business Head and SR HR Generalist should approve of the selection</td>
</tr>
<tr>
<td>• Communicate to their organization the purpose of the Diversity Committee</td>
<td>• Be a champion to the business areas in support of the Diversity goals and objectives</td>
<td>• Committee tenure should be about 18 months</td>
</tr>
<tr>
<td></td>
<td>• Communicate to the Diversity office issues and concerns that need to be addressed as they relate to the Diversity goals (employee relations issues should not be discussed as part of the activities of the Diversity Committee)</td>
<td>• Committee chair should be designated by SR Business Head – tenure about two years</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Chairperson(s) to report progress on performance in the context of the overall ICG Diversity goals – People, Customers, Suppliers and Community</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Communicate to the organization</td>
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<tr>
<td></td>
<td></td>
<td>• Influence change</td>
</tr>
</tbody>
</table>
Citi is proud to sponsor a number of significant local and global talent programs.
# Internal Development Programs

<table>
<thead>
<tr>
<th>Program*</th>
<th>Length</th>
<th>Key Program Components</th>
<th>Targeted Audience</th>
<th>Number of Participants</th>
</tr>
</thead>
<tbody>
<tr>
<td>Diversity Leadership Program</td>
<td>6 months</td>
<td>• Executive Coaching&lt;br&gt;• Executive Presence&lt;br&gt;• Leadership Skills&lt;br&gt;• Networking</td>
<td>• U.S.&lt;br&gt;• ICG Cross-business&lt;br&gt;• VP-Director&lt;br&gt;• Women and Minorities</td>
<td>30</td>
</tr>
<tr>
<td>Women's Leadership Development Program</td>
<td>3 days</td>
<td>• Executive Presence&lt;br&gt;• Leadership Skills&lt;br&gt;• Networking</td>
<td>• Global&lt;br&gt;• Citi Cross-business&lt;br&gt;• Director level&lt;br&gt;• Women</td>
<td>30 - 40</td>
</tr>
<tr>
<td>Women Leading Citi</td>
<td>18 months</td>
<td>• Advocacy&lt;br&gt;• Development Planning&lt;br&gt;• Leadership Enhancement&lt;br&gt;• Network Enrichment</td>
<td>• Global&lt;br&gt;• Citi Cross-business&lt;br&gt;• MD Level&lt;br&gt;• Women</td>
<td>60</td>
</tr>
</tbody>
</table>

*All program participation is by nomination (Manager and/or HR Generalist)*

# External Development Programs

<table>
<thead>
<tr>
<th>Program*</th>
<th>Length</th>
<th>Key Program Components</th>
<th>Targeted Audience</th>
<th>Number of Participants</th>
</tr>
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<tbody>
<tr>
<td>Working Mother Media: Best Companies for Multicultural Women – National Conference</td>
<td>2 days</td>
<td>• Leadership Skills&lt;br&gt;• Building Key Relationships&lt;br&gt;• Networking</td>
<td>• U.S.&lt;br&gt;• ICG Cross-business&lt;br&gt;• VP-Director&lt;br&gt;• Women</td>
<td>2 per business</td>
</tr>
<tr>
<td>Council of Urban Professionals: Wall Street Partners Forum</td>
<td>½ day</td>
<td>• Leadership Skills&lt;br&gt;• Networking</td>
<td>• US&lt;br&gt;• ICG Cross-business&lt;br&gt;• MD Level&lt;br&gt;• Black Women and Men</td>
<td>3</td>
</tr>
<tr>
<td>Council of Urban Professionals: Women’s Leadership Forum</td>
<td>½ day</td>
<td>• Executive Coaching&lt;br&gt;• Leadership Enhancement&lt;br&gt;• Networking</td>
<td>• U.S.&lt;br&gt;• ICG Cross-business&lt;br&gt;• VP-Director&lt;br&gt;• Women</td>
<td>6</td>
</tr>
<tr>
<td>US Banker Mentor Factor</td>
<td>1 day</td>
<td>• Professional Development&lt;br&gt;• Career Advancement&lt;br&gt;• Peer-to-Peer Networking</td>
<td>• U.S.&lt;br&gt;• ICG Cross-business&lt;br&gt;• SVP-Director&lt;br&gt;• Women</td>
<td>2 per business</td>
</tr>
<tr>
<td>US Banker National Leadership Workshop</td>
<td>1 day</td>
<td>• Professional Development&lt;br&gt;• Career Advancement&lt;br&gt;• Peer-to-Peer Networking</td>
<td>• U.S.&lt;br&gt;• ICG Cross-business&lt;br&gt;• MD level&lt;br&gt;• Women</td>
<td>1 per business</td>
</tr>
<tr>
<td>Executive Leadership Council: Mid-level Manager’s Symposium</td>
<td>1 day</td>
<td>• Leadership Skills&lt;br&gt;• Networking</td>
<td>• U.S.&lt;br&gt;• ICG Cross-business&lt;br&gt;• VP-Early Director&lt;br&gt;• Mid-Level Black Managers</td>
<td>15 - 40 (total Citi attendance)</td>
</tr>
</tbody>
</table>

*All program participation is by nomination (Manager and/or HR Generalist)*
DIVERSITY LEADERSHIP PROGRAM (DLP)

Leadership training
for high-performing diverse professionals

Overview
The ICG Diversity Leadership Program (DLP) is offered through the ICG Office of Diversity in partnership with the executive coaching services of Priscilla Douglas. The six-month program is designed to provide leadership development training for high-performing VP- to Director-level professionals with the goals of increasing and accelerating the development of our diversity pipeline of leaders across the Institutional Clients Group. There is a nomination process for selection into the Diversity Leadership Program, which begins in January of each year and is led by the HR team for each ICG business.

Program Design
- Six one-hour individualized coaching sessions
- Five to six full-day group workshops
- Senior Business Career Panels
- Networking and Senior Exposure opportunities

Program Objectives
- Strengthen strategic thinking and refine communication skills
- Increase familiarity, visibility and executive presence with senior management
- Expand internal/informal network
- Improve retention and upward mobility

Background
Launched in 2005 in GTS and later expanded to all of the ICG in 2009. The 2012 program brought the alumni count to 80.

Timeline
Program 1 and 2: March – October

VP-Director level
Leadership development training for high-performing VP/DIR level professionals to increase and accelerate the development of diversity pipeline of leaders across ICG.

Did You Know?
Diversity is not just attracting diverse talent—it’s also developing and retaining them.
Program recruits candidates from all the Institutional Clients Group businesses

Competencies

The prerequisites for application to the DLP program are as follows:

**Identified Core Attributes**

- Strong commitment to ongoing learning and professional development
- Willingness to solicit, receive and integrate feedback
- Manager support (Manager is an advocate)
- Consistent performance history
- Track record of success
- Strong time management skills
- Availability to commit and participate in a six month program that includes orientation and closing meeting, five in-person workshops, four business panels and senior sponsor discussions

Nomination Process:

Nominations are collected in January of each year from the respective HR teams supporting the business.

To ensure that we identify the right participants for the program, both individually and collectively, please use the following criteria/questions to guide your decision-making process.

**The right level?**

If a recent VP promotion, will this person’s professional development or effectiveness be enhanced (particularly from the executive coaching)?

Is this professional development investment appropriate at this time?

If a Director, will this person’s professional development or effectiveness be enhanced (particularly from the executive coaching)?

Could this individual benefit from the core elements of the program, i.e., executive coaching?
Business/Manager Support:
Will sponsoring this person be viewed as a good investment for the future of the business? How is this person viewed by the business? Will this person have the full (and unquestioned) support of their manager and/or business to participate in this program?

Time Commitment:
Could participation in this program have a negative impact on the business operations, functions, timelines? Is the person staffed on any key projects, deals, etc., or is there a non-work-related circumstance that may prevent them from effectively participating during the six-month period?

Performance, Potential and Motivation:
• Does the person have a track record of consistently strong performance?
• Is the person viewed as high performing, capable of growing their responsibilities beyond his/her current role in the future and performing at the next level?
• Is the person considered the next generation of Citi leaders? Will coaching, access, visibility and informal mentoring help get them there? Is the person open to receiving feedback?
• Does the person demonstrate a strong commitment to personal and professional growth?

Other Considerations:
Retention – Is the person at risk of leaving the firm? Why? Would participation in the DLP serve as an effective retention tool?
Other Training Opportunities – Is the person currently enrolled or recommended for another development program? What was the date of the last development program the person attended? Are there other L&D or in-business programs that may better fit this person’s development needs? Does this program make sense for this person?

Key Stakeholders Identified to Drive DLP Success:
In support of the expansion of the DLP across ICG businesses, senior managers and other key individuals have been identified to help drive support, visibility and program success.

2009 – 2011 Senior Business Sponsors
Julie Monaco – North America Region Head, GTS
Jim O’Donnell – Head of Sales and Relationship Management, Global Markets
Peter Tague – Co-Head of Energy, Power & Chemicals, Global Banking

“One of the best Leadership Programs that I’ve participated in. Great focus on practical application vs. theory.” Alumnus of 2012 Class
2012 – 2014 Senior Business Sponsors

Ken Porcaro – North American Sector Head of Client Management for Intermediaries in GTS

Carolyn Sheridan – Co-Head of Global Consumer Banking

Ward Marsh – Head of Municipal Securities

Executive Coaching Services
Priscilla Douglas

Senior HR Sponsor
Jonathan Simon – Head of ICG Diversity

ICG Diversity Contact:
JANINE TING JANSEN
Diversity Manager
janine.ting.jansen@citi.com
212-816-3950

Please click here to view testimonials from Diversity Leadership Program (DLP) alumni, as well as from Managers, and HR generalists.
To raise the bar on talent we need to be clear around what our standards are and help each other raise performance. We need to Say what we expect by being explicit about what those behaviors are; we need to Coach what we expect by coaching people to help meet those expectations and then we must Measure what we expect by holding each other accountable.

For each step in our careers we must look at what we aspire to do and what behavior and skills are needed at each level. Last quarter we looked at the Citi Leadership Standards and we looked at the leadership Pipeline. This quarter we want to focus on where you want to develop, whether it’s in your current role or if you aspire to be in a new role or career direction. For each role you must think differently, manage time differently, value different activities/outcomes and learn new skills, and failure to recognize these changes and adjust could derail you from being successful. While the Leadership Pipeline model helps guide us as we decide what direction we want to take our careers in, it is our Individual Development Plan that helps us articulate and track actions to enhance the short-term and longer-term job performance, as well as career objectives.
Developing Your Plan

Developing your Individual Development Plan is a four-step process:

Step 1: Prepare (Questions to Consider) and Shape Your Plan

1. What are my career goals?
   - What do you value? What is important/fulfilling to you?
   - What role or type of role can help satisfy that in the short term (2-3 years)?
   - What role or type of role can help satisfy that in the long term?

2. What are my strengths? Knowledge? Skills? Experience?
   - What is my unique strength/talent? What differentiates me from others?
   - What feedback have I had that indicates my strengths (e.g., performance reviews, informal feedback from peers, manager, clients...)?
   - How are these strengths manifested in your current job?
   - How are they manifested in other, non-work-related activities you do?

3. What continued knowledge/experiences do I need to assist me in reaching my goals?
   - What aspects of my current performance do I need to focus on developing?
   - What don’t I know yet that I need to know?
   - What specific work experiences do I need to achieve my goals?
   - What haven’t I experienced yet that will be necessary for my future success?
   - How can I acquire those experiences?
   - Who can assist me in reaching my goals? Who has knowledge and expertise that can benefit me?
   - What actions can I take?

4. What are my other non-work-related development activities?
   - What factors outside of my job will support my personal growth?
   - What are my aspirations? Are these feasible and do they fit with me, my job and my life?

The plan should focus on your career goals and strengths to leverage; you are primarily responsible for the creation of the plan, although you should engage your manager as a sounding board for your goals and ideas.

Make sure that you are clear on your career aspirations; the resulting discussion should be focused on your continuing professional development with an emphasis on learning, acquiring new skills and knowledge as they relate to achieving those goals.
Step 2: Formulate Specific Actions

As you clarify your goals and actions, break them down into specific steps with time frames and milestones for each action; set a specific time to reconvene and discuss progress with your manager separate from the formal year-end performance review. Timelines should generally be thought of in three month increments: What will you do in the next three months; the next six months, etc.? You and your manager should be able to measure your progress.

The most effective plan calls on several levers for learning and is designed within the goals and expectations of the current job. Think about how you can:

- **Enrich your current job experience**
  - Develop something new, e.g., an idea for a product or service, a system or tool, etc.
  - Address a problem area, e.g., turn around a team, reinvigorate a product, rebuild a client or colleague relationship, etc.
  - Broaden your current responsibilities, e.g., take on a larger scope of work, increase your span of management control, add new clients/accounts, etc.
  - Participate on a project or committee within or outside of your business

- **Use relationships as a form of learning**
  - Increase your exposure/visibility to additional people and/or groups
  - Observe subject matter experts in specific situations, e.g., client meetings, third-party negotiations, etc.
  - Seek out a formal mentor and/or coach

- **Bring all aspects of your life to your career and professional development**
  - Look for transferable skills from your personal life, e.g., coaching, teaching, creative arts
  - Broaden perspective; seek feedback from spouse/significant other, etc.

- **Use formal learning/training when it is targeted to immediately applicable tasks/assignments**
Step 3: Ensure Your Plan Is Comprehensive

- Does the development plan identify strengths and development areas that:
  - Reflect the feedback from recent performance reviews?
  - Target most impactful performance opportunities?
  - Will help meet the requirements of current role?
  - Will help prepare for future roles?
- Does the IDP include multiple types of learning activities to create opportunities for exposure, education and experience (rather than focus on a one-time event) and reflect the 70/20/10 rule? (See Selecting Development Actions)

- Are the development actions in the IDP:
  - Manageable given other work responsibilities?
  - Appropriate for the employee's level, role and current skill level?
  - Timely with milestones for progress and completion?
  - Encouraging the employee to try new things/go beyond his/her comfort zone?
  - Detailed (e.g., specific and clear)? SMART (Specific, Measurable, Achievable, Relevant and Time-Bound)?

Step 4: Discussion With Your Manager

Once you drafted your IDP, set some time aside with your manager to discuss:

- Where you want to go
- What success looks like
- Where you are now
- Develop the actions needed to get where you want to go
Citi Women’s Leadership

Build a talent pipeline for current and future business needs...
Launched in 2005 with three core objectives:

- Build a talent pipeline for current and future business needs;
- Create champions and role models for women;
- Leverage current women’s groups and create a forum through which women can share best practices, gain support and access

Highlights of the Program

- Three sessions held annually
- Curriculum designed to:
  - Create and show executive readiness
  - Become champions and role models to the organization
  - Grow professional networks
- “Inside Story of Citi” – panel discussion with senior executives
- All sessions highly rated by participants – mean rating 4.66/5.00 point scale
- Led by faculty from UCLA

Participant Criteria

- 35 highly valued talent
  - Officer level: Senior Vice President through Director
  - Management Responsibility
- Emphasis on P&L managers and/or has capacity to transition to P&L role
- Allocation by region in line with Business Leadership Program; consideration of Citi Holdings
- Global Products/Function/Region – 24 (69%)
  - Asia Pacific – 7 (20%)
  - EMEA/CEMEEA – 5 (14%)
  - Mexico & LATAM – 5 (14%)
  - Global Functions – 3 (9%)
  - Global O&T – 4 (11%)
- North America – 11 (31%)
  - Consumer – 4 (11%)
  - Citi Holdings – 1 (3%)
  - Institutional Clients Group – 5 (14%)
  - HR – 1 (3%)

How UCLA Teaches: Theory & Practice

- Taught by leading academics who are researching and consulting on the experience of women managers, managers of color, “out” LGBT managers and managers with disabilities in the workplace
- Each session involves lecture/discussion, small group work and personal work to engage participants at every level
- Focus on combining firm tools and takeaways with a transformative personal experience for the participants’ success
The Institutional Clients Group (ICG) Learning & Development team collaborates with the business to design and implement programs and tools that enhance employee performance; this is achieved by:

- Designing and implementing custom development programs based on business need
- Consulting with the business on strategies to improve employee performance
- Developing tools/resource materials to enhance career development
- Providing classroom, virtual and online training courses to meet professional and personal goals

For more details on some of our key accomplishments and upcoming training initiatives, please read the business highlights below:

**Corporate and Investment Banking:**

In April 2012, Corporate and Investment Banking launched the Citi Corporate and Investment Banking Curriculum, an initiative focused on investing in and developing our talent across the globe. The curriculum consists of two main components: **(1)** competencies for each role – communicating a clear definition of what is expected of employees in their respective roles; and **(2)** training to provide employees with the opportunities to develop the skills necessary to master these competencies. To learn more about the curriculum, visit the Corporate and Investment Banking Learning and Development Portal. The portal provides consolidated access to the learning and development opportunities across our business. **Click here** to be brought to the portal, then click My Curriculum to access the Corporate and Investment Banking Curriculum.
Citi Markets:
Citi Markets consists of an extensive series of product-specific training, as well as high-touch promotion and talent programs. We recently introduced the “One Markets” product-based foundational and mastery-level product curriculum. The foundation curriculum is designed to provide basic product knowledge for professionals new to the product. The mastery curriculum is designed to supplement the already extensive product knowledge of a senior professional. Employees can access product, functional, promotion and talent programs on the One Markets website via the Employee Portal as well as Velocity, the Markets electronic trading platform. Please click here to visit the One Markets website.

Citi Transaction Services:
Citi Transaction Services offers a comprehensive catalog of training and development opportunities through the recently launched CTS University site including CTS Info Sessions, CTS Institutes and access to the Citi Leadership Curriculum. CTS University is the catalyst that enables all CTS employees around the globe to manage their own development and is linked to CTS strategic priorities and Citi’s Leadership Standards. Moreover, beyond what is presently available on the site, specific role-based and advanced training options are among the enhancements on the horizon. In addition to training, employees also have access to a broad set of development and career tools through CTS University. Please click here to visit the CTS University website.

Citi Private Bank:
NAM CPB Learning & Development facilitates the learning process for CPB employees to include analysts, support staff, product specialists and private bankers. As individuals join CPB, key new hires are provided with a “Navigating CPB” course where CPB leaders and product heads provide insight into the various aspects of NAM Citi Private Bank in a two-day program. NAM CPB Learning & Development also delivers an eight-week Entry-Level Analyst Training Program. In addition, several boot camps are offered that focus on Investments, Credit and Trust & Estate along with providing other timely product and strategic sales training.
### Whom Do I Contact with Questions?

#### Securities and Banking North America Learning & Development Team
- Nasheela O'Dowd, Senior Relationship Manager (212-816-5510)
- Monica Yavin, Relationship Manager (212-816-8370)
- Brian Fekrat, Relationship Manager (212-816-7895)
- Kathryn Mayer, Training Analyst (212-816-7535)
- Sara Terry, Relationship Manager (212-816-7385)
- Ivette Arroyo, Relationship Manager (212-816-6349)

#### CTS North America Learning & Development Team
- Christine Kelly, Senior Relationship Manager (212-816-3606)
- Rachel Bobruff, Relationship Manager (212-816-6740)
- Jennie Tsang, Training Analyst (212-816-1684)
- Zach Brodsky, Training Analyst (212-816-5502)
- Christina Nemeth, Performance Analyst (212-816-7857)

#### CPB Learning & Development Team
- Susan Berry, Global Senior Relationship Manager (212-657-0034)
- Geoffrey Unger, Senior Relationship Manager (212-657-6202)
- Jennifer Gabriele, Americas Senior Relationship Manager (212-559-1791)
- Lesley Vasquez, Training Analyst (212-657-6163)
Jonathan Simon is a Director and the Head of Diversity for Citi’s Institutional Clients Group (ICG). He is responsible for overseeing, developing and implementing the overall diversity strategy for this division. His office is responsible for ensuring that these businesses promote fair and equitable employment opportunities; fostering recruitment, mentoring and promotional opportunities for women, minorities and underrepresented populations. His responsibilities also include oversight and management of the ICG Employee Programs Department.

Previously, Jonathan was a Client Manager in the Healthcare franchise of Global Banking within the ICG. He was responsible for delivering best-in-class global banking services and capital markets advice/execution, in addition to identifying foreign exchange, interest rate hedging and transaction services opportunities. Armed with an undergraduate degree in Finance (Honors) from Morehouse College, Jonathan was keenly focused on the corporate finance issues facing his clients and delivering the best of Citi.

Jonathan joined Citi in 2004 in the Atlanta Corporate Banking office as a Vice President in the Consumer & Industrials franchise. He moved to the New York office in 2007. Prior to Citi, Jonathan worked for SunTrust Bank in Atlanta for eight years in wealth management and corporate banking.

Jonathan is married to Sidney and has two children, McKenzie and Jackson. His hobbies include spending time with his wife and kids, cooking, collecting art, traveling and listening to jazz music. He also serves on the Associates Council of Prep for Prep, a New York-based nonprofit organization whose mission is to prepare minority students for New York’s most prestigious private schools.

Marvin Leben is currently a Diversity Manager in Citi’s Institutional Clients Group Office of Diversity and Employee Programs. He is responsible for all diversity metrics and analytics which are reported to the senior management of the ICG. Marvin also manages the administration of the Voice of the Employee (VOE) survey for ICG globally.


Marvin graduated from Metropolitan College of New York, earning a Bachelor of Business Administration degree in 2002. Marvin is currently pursuing his MBA at Regent University, School of Global Leadership & Entrepreneurship.

Marvin is a native of the Republic of Trinidad & Tobago and currently resides in Newark, New Jersey. His personal interests include international travel and musical entertainment.
Janine Ting Jansen is a Diversity Manager in Citi’s Institutional Clients Group Office of Diversity and Employee Programs. Janine is a subject matter expert on diversity and relies on her versatile background to assist the ICG.

Shanique Bramwell is a Diversity Manager in Citi’s Institutional Clients Group — Office of Diversity and Employee Programs with project management responsibilities. Shanique was formerly a member of Citi’s Global Workforce Diversity Office – Affirmative Action/Equal Employment Opportunity team where she managed Affirmative Action Plans and Department of Labor audits.

Shanique has over 12 years of experience in compliance and Equal Employment Opportunity. Before joining Citi, Shanique spent several years at Cendant Corporation in a variety of human resource positions where her responsibilities included recruiting, corporate training and the investigation of formal charges of discrimination filed with the Equal Employment Opportunity Commission.

Shanique received a Bachelor of Business Administration degree from Hofstra University in 1999, and she is currently pursuing her Master of Science degree in Industrial and Labor Relations at Baruch College.

Shanique resides in Queens, New York, has a passion for diversity and also enjoys spending time with family, reading and traveling.

Agnes D. Witek joined Citi as an Executive Assistant in the ICG Office of Diversity in August of 2011. As a member of the ICG Diversity team she provides administrative support in supporting major projects such as the Diversity Leadership Program, Global Community Day and other Employee Programs. She is also responsible for organizing CPR training courses, the quarterly Book Fair and Employee Assistance Program offerings.

Agnes has over ten years of experience as an administrative professional. Her skills and knowledge have grown and developed over her years of experience working across various industries such as the Financial and Hedge Fund service providers, Nonprofits and Hotel Management. She graduated from Baruch College with a Bachelor of Business Administration degree in Human Resources Management.

Agnes is a native of Poland and currently lives in New York with her husband, Jan, son, Jakub and daughter, Natalia.
Thank you for reading *Connecting All of Us: Diversity and Inclusion in the ICG*. This e-book is meant to be a resource for you and we can only improve our content with your ideas and suggestions. If you have comments or feedback, please feel free to share them by emailing us at [ICG Office of Diversity](mailto:ICGOfficeofDiversity@Citigroup.com). To view archived issues of *Connecting All of Us*, [CLICK HERE](#).