



Tracy Castle-Newman

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Former Wall Street Executive | Advocate for Women in Business | Board Advisor | Speaker



Tracy Castle-Newman is a highly accomplished Wall Street executive with over 35 years of experience in the financial services industry. Most recently serving as the Head of Client Business Development and Strategy for the Global Institutional Equity Division at Morgan Stanley, where she spent more than two decades leading organizational and business transformation.

Following the Global Financial Crisis, Tracy played a pivotal role in transforming Morgan Stanley's business by crafting and implementing a client strategy that led to significant organizational and business changes. Her commitment to diversity is evident in her efforts to establish the only female equity portfolio manager community and organize high-profile events to elevate women managers in the

industry. Her initiatives have been recognized for helping many women launch their own hedge funds.

Tracy is celebrated for her dynamic and authentic approach, using storytelling and real-life examples to inspire and empower her audiences. Her talks offer practical advice on increasing impact and achieving goals, whether for organizations, clients, or personal development. She serves on several boards, including the Virginia Tech Foundation Investment Committee, Vice President of Virginia Tech Pamplin College Advisory Board and is an External Advisor in the Bain Advisory Network.

Keynote Topics:

- ☐ Executive Leadership Enhancement: Leveraging Your Differences to Stand Out
- Brand Awareness: Building and Controlling Your Brand
- ☐ Client Focused: Developing a Strategy to Deliver Commercial Client Solutions
- Intentional Leadership: Transitioning from Manager to Leader
- ☐ **Leadership Journey:** Lessons from a Career on Wall Street
- Optimizing Strategic Connections: Mastering the Art of Building and Leveraging High-Impact Networks







