



# Tracy Castle-Newman

Former Wall Street Executive · Board Advisor · Executive Coach

35 years in financial services | Advocate for women in business | Leader | Problem Solver

## SPEAKING STYLE

Tracy is recognized for her dynamic and authentic approach — using storytelling and real-life examples to inspire audiences with practical, immediately actionable advice on increasing impact and achieving goals.

## FORMATS

- › Keynotes
- › Workshops
- › Moderation
- › Executive

## BOARD & ADVISORY

- Independent Board Trustee, Bitwise Funds Trust
- CIMA Registered Director
- Strategic Advisor, TSWS
- External Advisor, Bain Advisory Network
- Virginia Tech Foundation, Investment Committee
- VP, Virginia Tech Pamplin College Advisory Board

## CONTACT

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## ABOUT TRACY

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 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 change. 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 — initiatives recognized for helping many women launch their own hedge funds.

Today she advises leaders and organizations on strategy, leadership, and growth, and serves on boards where her experience scaling businesses and navigating complex environments adds value.

## SPEAKING TOPICS

- ▶ Leveraging Your Differences for Impact
- ▶ Building & Controlling Your Brand
- ▶ Transitioning from Manager to Leader
- ▶ Executive Presence & Influence
- ▶ Career Acceleration for Women
- ▶ Mastering High-Impact Networks
- ▶ Leadership Through Change
- ▶ Lessons from a Career on Wall Street

## WORKSHOPS

- ◆ Elevator Pitch
- ◆ Goal Setting & Visibility
- ◆ Team Building
- ◆ Leadership Lessons & Best Practices

## AUDIENCE OUTCOMES

- ◆ Clear frameworks and tips they can apply immediately
- ◆ Greater confidence and clarity about their value
- ◆ Practical tools for career growth and leadership effectiveness

### Every Engagement is Custom-Designed

Tracy tailors every keynote, workshop, and session to the specific goals, audience, and culture of your organization — ensuring each engagement delivers the outcomes that matter most to you.