



NAUREEN HASSAN

Naureen Hassan is a 25-year veteran of the financial services industry with expertise in strategy, digital transformation, cybersecurity and regulatory/risk management.

She was, most recently, the Chief Digital Officer for Morgan Stanley Wealth Management (MSWM) and a member of the MSWM Operating Committee. She was responsible for the business's digital transformation, strategy and delivery focused on modernizing how the firm and its advisors acquire, serve and interact with clients. In this role, she led the product development teams that built digital marketing capabilities, consumer facing technologies and artificial intelligence-enabled platforms for advisors. She was also responsible for the call-center based advisory business line – a \$100MM revenue and \$40MM net P&L business. In addition, she helped lead the agile-transformation of the MSWM development processes and the shift toward a best-of-breed technology partnership and integration strategy.

Previously, Ms. Hassan was the executive vice president leading Investor Services strategy, segments and platforms at the Charles Schwab Corporation and a member of the firm's twenty-member Executive Committee. In this role, she was responsible for the strategy, client experience and digital channels supporting the individual investors who hold \$1.3 trillion client assets at Schwab. During her time at Schwab, she also served as the Chief Operating Officer of Schwab Bank (one of the top 15 banks in the country) and was a member of its Board and Management Committee. She also held leadership roles in Schwab Advisor Services, the leading custodial platform for nearly 7,000 independent advisory firms. Earlier in her career, she worked at McKinsey & Company, specializing in operational and process design for retail and healthcare firms.

Ms. Hassan was formerly a member of the Board of Directors at OneSpan, a \$250MM revenue public security software and hardware firm, and Ascensus, the largest independent recordkeeping services provider, third-party administrator, and government savings facilitator in the United States.

Ms. Hassan also serves on the board of the California Academy of Sciences and the Cathedral School for Boys in San Francisco. She was previously on the board of the Charles Schwab Bank and the Women's Initiative for Self-Employment.

Ms. Hassan holds a BA from Princeton University (magna cum laude), and a Masters of Business Administration from the Stanford University Graduate School of Business.
