



16th Annual Rainbow PUSH Wall Street Project Economic Summit

"WALL STREET TO MAIN STREET: Economic Parity - The Struggle Continues..."
January 30-February 1, 2013



Chronological Summary of Key Accomplishments:

WALL STREET PROJECT – LAUNCHED ON JANUARY 15, 1997

The Wall Street Project was founded in 1996 by Reverend Jesse L. Jackson, Sr., and the Citizenship Education Fund, and officially launched by Rev. Jesse Jackson and prominent minority business owners on January 15, 1997, Dr. King's birthday. The Project is represented by satellite or bureau offices (New York, Atlanta, Detroit, Chicago, Los Angeles, East Palo Alto, Houston and Washington, D.C.), each representing the competency center for one or more of the industry spokes the organization focuses on: financial services, public policy, telecommunications, automotive, energy, advertising, international affairs, food services, insurance, entertainment, manufacturing, and information technology.

The Wall Street Project challenges corporate America to end the multi-billion dollar trade deficit with minority vendors and consumers and works to assure equal opportunity for diverse employees, entrepreneurs, and consumers. The Project uses Operation Breadbasket's model of research, education and negotiation and reconciliation to achieve its mission to promote inclusion, opportunity and economic growth by encouraging public and private industries to:

- *Improve hiring, promotion and retention practices*
- *Name more minorities to corporate boards*
- *Allocate more capital to minority companies*
- *Promote intra-trade relationships among diverse businesses*
- *Increase funding for educational scholarships, and voter registration education*
- *Research diversity employment, procurement board representation and community investment practices of industries to ensure equal and fair consideration for minorities at every level and assist corporations with the need of accessing under-served markets*
- *Increase financial literacy in minority and/or underserved communities through the work of the One Thousand Churches Connected program*

1998: "Inclusion is the Key to Economic Growth"

1st Annual Wall Street Project – Windows on the World, One World Trade Center, New York and the New York Stock Exchange

"We are here today because Wall Street has a critical role to play in fulfilling Dr. King's dream of opportunity for all Americans." --President William Jefferson Clinton – 1st Annual Wall Street Project

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- New York Stock Exchange (NYSE) closed for the first time in observance of Martin Luther King, Jr. Holiday and hosted a Gala Fund-raiser to benefit the Citizenship Education Fund and work of the Wall Street Project (WSP).

- 1st WSP conference co-convened by Sandy Weill, Dick Grasso, and Rev. Jackson. Speakers included President Clinton, Alan Greenspan, and Arthur Levitt.
- Opening of Media and Telecommunications Project in Washington, D.C. and Automotive Project in Detroit, MI
- Corporation Survey to 400 Fortune 1,000 companies. Banking, Pension Fund Management, Asset Management, Advertising, Information Technology, Transportation, Professional Services and General Procurement industries were polled to determine the level of participation of Fortune 1,000 companies with minority employees and minority-owned business entities, the company's commitment to the promotion of qualified minority employees into management and senior management positions, and company's corporate board.
- Trillion dollar Roundtable with video link to Vice President Gore and Andrew Cuomo. The Roundtable explored how to utilize existing government, quasi-government and private vehicles to transport capital to under-served communities, and how to create a new vehicle to fill the gaps.
- Implemented a campaign to educate minority businesses and the public on APIC (American Private Investment Corporation) a joint "New Markets" initiative between the SBA, HUD and the Department of Commerce. Undergirded by the Clinton Administration, the initiative espoused the notion that domestic companies should have some of the same economic incentives to invest at home as they do abroad.
- Met with foreign auto manufacturers while strengthening existing relationships between minority suppliers and the Big Three firms. Distressed minority GM dealers asked the organization to intervene in a dispute with GM. Trade Bureau member, Weldon Latham conducted an independent audit and found that there were substantial problems in GM's pioneering minority auto dealers program. As a result of the audit findings, GM agreed to a moratorium on shutting down the minority dealers and as part of the moratorium agreement and subsequent study, acted on the two hundred recommendations for improvement.

1999: "Building Trading Partnerships to Expand the Marketplace"

2nd Annual Conference (Jan. 14 – 15, 1999) – Windows on the World, One World Trade Center, New York, New York

"AT&T Chairman Michael Armstrong made the theme Building Trading Partnerships to Expand the Marketplace come alive when he announced that a minority owned firm would manage the company's billion dollar bond offering. The audience rose to its feet and cheered at the unprecedented accomplishment, which had been in negotiation for months with the assistance of Rev. Jesse L. Jackson, Sr. and the Wall Street Project. --CEF Annual Report

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- During its 2nd Annual Conference, WSP hosts its first Career Opportunity and Development Expo Conference for corporate professionals in the job market.
 - Engaged by AT&T to conduct a study of access charges in the US.
 - Taskforce, chaired by former NBA star, Isiah Thomas, established to develop strategies to persuade sports companies and corporations to hire and promote minorities and develop trading partner relationships with minority businesses.
 - Called upon the National Association of State Attorneys General Antitrust Task Force to investigate the resistance of the grocery industry in the placement of minority business products on grocery shelves in major supermarkets across the country.
 - By bringing together the senior management of Lockheed Martin and the Ford Motor Company, the Wall Street Project facilitated the \$23 million dollar purchase by Black owned Integrated Systems Analysts, Inc. of Lockheed's Commercial Systems & Services unit. The acquisition does three things: provide quality service to Ford & Lockheed Martin, allow Integrated to enhance its capacity to provide computer system services anywhere in the country from its 14 offices and provide 250 additional jobs.

- Studied the merger between MCI and WorldCom to determine what effect the combination would have on competition, access and minority employment. The study revealed too few safeguards to ensure representation of minorities, or protection of consumers, as well as red-lining within WorldCom.
- Automotive Project developed first comprehensive automotive survey to review the diversity initiatives of the global automotive community.
- Opening of LaSalle Street Project in Chicago, Silicon Valley Project in East Palo Alto and Wall Street West in Los Angeles
- Reverend Jesse L. Jackson, Sr. negotiates release of three American soldiers from Kosovo
- With a group of Detroit based ministers Rev. Jackson introduced the relationship of The Word Network with Direct TV and Rainbow PUSH Coalition

2000: “BUILDING BRIDGES TO EXPAND THE MARKETPLACE”

3rd Annual Wall Street Project Conference

“Our mission is simple – to expand access to capital to underserved communities with underutilized and untapped capital. We must level and expand the economic playing field for all Americans...The underserved communities represent market, money, talent, location and growth. Since we started the Wall Street Project three years ago, we have seen that when we replace walls with bridges, everyone wins. Building on our successes – from the establishment of the New Markets Initiative with President Clinton, to expanding the Community Reinvestment Act, to assisting minority underwriters in gaining access to billion dollar underwriting assignments – we will continue to greenline redlined America.” -- Reverend Jesse L. Jackson, Sr.

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- With the help of the Wall Street Project, minority auto dealer **Mel Farr Automotive** was able to secure \$35 million dollars in additional financing to both grow his business, and meet the transportation needs of the working poor in Detroit where 45% of the people had not transportation, while 70% of the jobs were outside of Detroit.
 - AT&T breaks the glass ceiling by naming Blaylock & Partners as co-managers on a multi-billion dollar underwriting. Blaylock introduced untapped markets and so outperformed expectations that other companies including Pepsi, Seagrams, Blockbuster/Viacom and UPS soon followed suit, using more Black and Brown broker/dealers than at any time in the past.
 - The Overseas Private Investment Corporation (OPIC) announced the New Africa Fund, to be managed by Maceo Sloan, whose company has a lengthy track record in Africa. At \$350 million dollars, it is the largest OPIC fund to date.
 - When Ameritech sold half of its wireless telephone business to GTE, the Wall Street project helped to set the climate for a partnership between GTE and Georgetown Capital Partners.
 - After Wall Street Project negotiations with GTE, Blacks and Hispanics were, for the first time, able to buy telephone lines.
 - David Wilhelm created the Appalachian Ohio Development Fund, following our visits last year. The \$15 million dollar fund will provide investments of between \$250,000 and \$2 million dollars to create or expand business in specialty foods, tourism, technology and light manufacturing in Ohio’s 29 Appalachian counties.
 - Isiah Thomas, chair of the Wall Street Project’s Sports Task Force, was named to the board of the Chicago Stock Exchange, and credited Rainbow Sports with creating the climate to make it possible for him to purchase the Continental Basketball Association.
 - Alabama based Calhoun Foods, doubled its retail volume to become one of the largest minority owned retail supermarkets in the South, thanks to the support of the Wall Street Project in his purchase of several stores from A&P during its recent divestiture of stores in Alabama and Georgia.

- Opening of Peachtree Street Project in Atlanta
- The Media & Telecommunications Project releases a study entitled “The Three-Legged Stool of Telecommunications Policy: Access Charges, Universal Services and Competition.”
- Wall Street Project worked closely with the White House on the New Markets Initiative to promote the investment of private capital for the development of new markets which exist in America’s underserved areas. Rev. Jackson traveled with the President Clinton, corporate CEO’s and minority entrepreneurs to underserved communities from Appalachia to the Mississippi Delta and from Newark to a reservation in North Dakota, in order to draw attention to the great potential of these markets.
- Through the Financial Modernization Act, Wall Street Project (WSP) was able to expand CRA to include insurance companies. WSP is set to convene the bankers and insurance companies for a multi-trillion dollar reinvestment commitment. With the passage of the Financial Modernization Act, our goal is to ensure that the powerful business proposition created for the private sector leads to an equally powerful commitment to the communities in which they do business. This initiative will help expand home ownership. But the core of this initiative is the commitment by these same companies to use minority advertising agencies, media and construction firms; minority lawyers and CPAs—all of our communities’ economic services. By using the full range of our economic services, we enhance our communities’ economic development.
- Through the Media and Telecommunications Project filed several comments before the FCC ranging from supporting access charge reform to opposing the Sprint/MCI WorldCom merger.
- Economic Literacy and the Church: In addition to access to opportunities, the 2000 conference will focused on broadening financial education through schools and churches. The CEF initiative, One Thousand Churches Connected, is launched at the 3rd Annual Wall Street Project. In addition to a financial ministry curriculum and on-line support, The New York Stock Exchange agrees to intensive training in the “science of the market” for 35 ministers four times a year. The literacy campaign is also slated to support of various industry initiatives directed at youth and the schools, including the Securities Industry Foundation’s stock market game and other, similar programs. Of note, 75 children of Rainbow PUSH staffers played the game and purchased stock at the Chicago Stock Exchange.
- Telecommunication Systems Inc. became the first minority Wall Street Project Trade Bureau member to do an IPO and list on the NASDAQ.
- Rev. Jackson leads 20 minority business leaders on sub-Saharan Africa trade mission, resulting in several members of the delegation doing business in African and with each other.
- The Silicon Valley Project opens and embarks on a Minority supplier Diversity Project aimed at increasing minority business opportunities with technology companies.

2001: Diversity in Corporate America: “The Essential Best Practice”

4th Annual Wall Street Project Conference

“Those who have been locked out from economic growth want the same thing from corporate America that corporate America wants from Japan – balance trade, open trade, and fair competition. These underserved communities want the same confidence in them that we have in Eastern Europe and Southeast Asia...If we see the emerging African market and its vast potential as we see the European and Asian markets, if we see within these underserved American communities their vast potential, we can redefine the possible and shatter old assumptions.”

--Reverend Jesse L. Jackson, Sr.

- Congress passes the New Markets Initiative Legislation. An outgrowth of the Wall Street Projects work on the New Markets Initiative was that investors who back new enterprises in designated poor areas received tax credits for their investments, and new businesses would be eligible for low interest SBA loans that are to be leveraged 2-1.
- Wall Street Project credited with increasing the number of minorities and women on corporate boards. Financial community beginning to look to minority and women owned firms to participate at greater levels in corporate underwritings. At Rev. Jackson's suggestion, Microsoft raised the bar of deposits in minority banks by putting \$5 million dollars into Seaway Bank in Chicago versus the traditional corporate deposit of \$100,000 and below in minority banks. The larger sum enables Seaway to increase services in underserved communities.
- The One Thousand Connected (OTCC) initiative is formerly launched and begins its work with corporate partners like Freddie Mac, Citigroup, NYSE, Compaq, Intuit, Equifax, AT&T and NAIC to educate thousands of Americans in the areas of *management of consumer debt*, *home ownership*, and *long-term financial planning through investments*. Over the next four years OTCC will establish or enhance financial ministries in 20 churches in the top 50 markets in the country.
- Insurance Industry Think Tank formed by the Wall Street Project to promote greater outreach to minority and underserved communities; education; and identifying corporate best practices in the area of diversity. Additional focus on educating consumers as to "redlining" practices specific to the insurance sector as well as race-based premiums.
- Opening of the Wall Street Project Texas in Houston, Texas.
- Strategic partnership formed with the National Black MBA Association that did what?
- Significant contracts obtained from corporate legal departments for our members as a result of the Wall Street Project's advocacy network to persuade corporate legal departments to fairly allocated corporate legal work to qualified minority lawyers.
- Sports division secures capital from Dr. Pepper for minority-owned racing team and driver, a first in NASCAR history
- The Silicon Valley Project partners with Homstead.com on a program to provide summer internships at local technology companies for East Palo Alto area high school and college youth. The Project also surveys 50 technology companies on their corporate diversity, procurement and employment diversity efforts.
- Through a collaboration of the Automotive, Peachtree Street and Wall Street Projects greater minority inclusion was fostered at Toyota in the areas of employment, procurement and community investments. The result was Toyota's 21st Century Diversity Strategy—a 10-year, \$7.8 Billion commitment to diversity.

2002: "A Time to Heal...A Time To Rebuild"

5th Annual Wall Street Project Conference

"When African Americans and Hispanics supply companies with large portions of their market and revenues and they, corporations, don't contract with people of color, don't have any people of color above middle management or on their board of directors, they boycott us even though our consumer dollars keep the company in business...As Dr. King stated on April 4, 1968, 'let us keep the issues where they are. The issue is injustice.' It was unjust in 1968 not to hire people of color above the broom and mop level, just as it is unjust now. We must trade with our power to open closed doors. We must invest to develop institutions in our own community." --Reverend Jesse L. Jackson, Sr.

- Travelers' offering served as one of the most inclusive offerings to date—out of 52 banks, 21 minority owned banks participated in the syndicate, along with 4 co-managers
- Partnered with AOL Time Warner to present I-Deal Flow, a minority venture capital forum to facilitate investment in minority-led companies.
- A source for diversity best practices in the areas of employment and procurement, Wall Street Project served as advisory councils for Monster.com and DiversityInc.com

- Rainbow PUSH Automotive Project became an organization plaintiff and a consumer education advocate to end undisclosed lending practices that discriminated against African-American and Latino car buyers. Rainbow PUSH, Consumer Federation of America and National Consumer Law Center were successful in getting captive finance companies to impose a 2.5 % point cap on the dealer markup as a result of a settlement negotiated in over 7 lawsuits that involved captive financing and banking institutions. RPC/CEF participated in increased consumer awareness on racially based loan markups, and supported the Fair Lending Bill in California.
- Rainbow PUSH Advocated with DaimlerChrysler on behalf of Global Hue to remain multi-cultural agency of record.
- Challenged Nissan on the non-representation of a multi-ethnic agency which resulted in the hiring of True Agency for their marketing urban and African American. At the time of engagement True was not minority certified, however in partnership with TBWA/Chiat/Day.
- Partnered with NAMAD along with other community groups, advocating that manufacturers adopt the dealer 15% solution for success. Each manufacturer has been asked to commit to developing programs that work toward ensuring that 15% of their retail network is majority owned by people of color.
- KPMG and Wall Street Project Impact Analysis: Through a partnership with KPMG with the support of Citigroup, the Wall Street Project engaged in a five-year review of its impact as a leader of diversity best practices research. Approximately fifteen multinational corporations participated in the study. Cited as integral to improving diversity initiatives was the Wall Street Project's penchant for raising awareness of the benefit of tracking and reporting diversity programs, raising issues and bringing visibility equitable employment policies, inclusive hiring and board selection practices as well as insight to non-traditional areas of business.
- NFL players engage in one-day financial literacy workshop at NYSE
- \$38 million New Markets Initiative fund dedicated to investment in underserved communities in Appalachia
- Rev. Jesse Jackson announces the organization's commitment to creating national awareness concerning the blatant discriminatory practices of the insurance industry, past and present. Under direct resolution from its Board of Directors, the organization commits to advocate for national attention brought to injustices within the industry such as: Race Based Premiums; Redlining; Slavery Policies; and Manipulation of Credit Scoring.

2003: "Equity For All – Establishing the Economic Agenda for Growth"

6th Annual Wall Street Project Conference

"We have come a long way together in the past six years. Together, we have brought more people of color into the financial services industry, we have empowered diverse small businesses in our neighborhoods, and we have promoted financial literacy in schools and in houses of worship across the country. But despite the progress we have made, we have much work left to do." --Sandy Weill, Chairman and CEO, Citigroup Inc. (2003) – Co-Chair, 2003 Wall Street Project Conference

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- Rainbow PUSH coalition partners with the Urban League and SCLC to submit an amicus brief before the United States Supreme Court to help preserve affirmative action.
 - After several years of promoting economic growth in Harlem, New York, General Motors launches its plans for a Harlem Auto Mall-the first dealership, let alone auto mall, north of 96th Street in over 40 years, which in anticipated to bring over 200 new jobs and millions of dollars in investment.
 - WSP hosts a corporate governance forum in New York with special keynote speaker, Commissioner Roel Campos of the Securities Exchange Commission.
 - New York Life selects a diverse financial services firm as one of its five co-managers for its \$1 billion, 30 year surplus notes offering.

- In *Gratz v. Bollinger*, the U.S. Supreme court rules that the use of race as a factor in admissions by the University of Michigan Law School is not unconstitutional, and says that the government has a compelling interest in promoting racial diversity on campus, thereby rejecting a challenge to affirmative action.
- Community Outreach: Wall Street Project is asked to guide and help chronicle the allegations of several employees of PSE&G, New Jersey's largest electric utility. Viewed as an opportunity to support people who needed help reaching the ear and support of their senior level management, as well as advance broader social goals, WSP assisted the employees and facilitated a meeting between Reverend Jackson and PSE&G senior management in an attempt to reach resolution and reconciliation.

2004: “Inclusion: The Key To Growth and Expansion of the Marketplace”

7th Annual Wall Street Project Conference

“We are in the midst of a difficult period in corporate America as levels of distrust and skepticism are at all time highs. Our daily newspapers are painted with headlines of financial scandal and abuse and speak little of honesty and achievement. Therefore, this forum could not come at a more critical time. Our message of cooperation, opportunity and equal access are the very themes necessary to revive the spirit which enables our country’s businesses to succeed.” - Mellody Hobson, President, Ariel Capital Management, Inc./Ariel Mutual Funds (2004) – Co-Chair, 2004 Wall Street Project Conference

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- The Boeing Prime Opportunities Fund: The Boeing Company announces decision to allocate \$1 billion of its pension fund assets to emerging investment managers.
 - General Electric company leadership, inspired, in part, by Reverend Jackson’s call for increased investment by majority firms with minority investment managers, organized a meeting at GE headquarters of minority managers with key GE investment decision makers.
 - Williams Capital and Blaylock Partners serve as book runners on \$750 million GE financing. Williams Capital leadership attribute this new business to the meeting of minority managers held on-site at GE.
 - GM selects Ariel as the first Minority Mid-Cap Manager within its \$20 billion Defined Contribution Plan. Ariel products were also selected to be part of GM’s 401K.
 - Community Outreach: Wall Street Project satellite offices work with their respective regional community to collect clothing, food, water, pharmaceuticals, building supplies and financial donations for Haiti through its *National Emergency Haitian Relief Efforts*.
 - Community Outreach: RPC New York (tri-state) Chapter re-established to serve community and church social justice and advocacy projects and events. Dr. Luonne Rouse and Dr. Clyde Anderson appointed by Rev. Jesse L. Jackson, Sr. to position of Chairman and President, respectively.

2005: “Beyond Diversity, Equity and Parity: A New Covenant”

8th Annual Wall Street Project Conference

“Since its inception, WSP has been dedicated to creating a workforce and a business community that better mirrors our society.” --Michael R. Bloomberg, Mayor, New York City (2005)

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- Wall Street Project outlines its case to the government and corporate America to consider its call for five percent inclusion.
 - Met Life increased its partnership with Atlanta Life’s Asset Management Unit by \$50 million. Atlanta Life credits the work to the Wall Street Project.
 - Google held a public offering of over 14,159,265 shares of Class A common stock, the pool of seven underwriters acting as co-managers included Blaylock and Company, Inc.

- Wal-Mart Stores, Inc. issued \$800 M Notes with Utendahl Capital and Ramirez & Co. as Joint Lead Book-running Managers. The transaction also included Blaylock, Jackson Securities and Loop Capital Markets as Co-Managers.
- Community Outreach: Wall Street Project satellite offices organize campaigns to inform public of the re-authorization of key provisions of the Voting Rights Act of 1965, culminating with a March to protect voting rights, fairness and justice in our voting systems and equal access in Atlanta, GA.
- Community Outreach: Advocacy action in support of Katrina victims.

2006: “A More Perfect Union: The Quest for Equity and Parity”

9th Annual Wall Street Project Conference

“The inclusion of minority owned firms in the managing of pension funds, home ownership and the inclusion of more minorities at the table of organized labor are vital steps in improving the overall economic outlook for not only the minority participants in these opportunities, but for all Americans. If this nation is to be prosperous and competitive all citizens must have the opportunity to participate in the American promise...Nine years ago diversity opportunities were limited to isolated firms such as the one I was part of, today because of the Rainbow PUSH Wall Street Project there is open and honest discussion about the value of a diversified workforce in the financial sector.” --Jon S. Corzine, United States Senator (2006)

- NYSE Group issued 28,750,000 shares of Common Stock totaling \$1,768,125,000 with M.R. Beal, Blaylock & Company, Loop Capital Markets, Toussaint Capital Partners, Utendahl Capital Partners and The Williams Capital Group as a Co-Manager.
- SAIC, Inc. issued 86,250,000 shares of Common Stock totaling \$1,293,750,000 with the Williams Capital Group as a Co-Manager
- New York City transitional Finance Authority issue \$650,000,000 of Building Aid Revenue Bonds with M.R. Beal, Loop capital Markets, Toussaint Capital Partners, Utendahl Capital Partners and Jackson Securities as Co-managers
- Loop Leads Commonwealth Edison bond Deal, first ever bond offering managed exclusively by minority-owned investment banks.
- Loop Capital Markets co-lead the utility industry’s first ever bond offering managed exclusively by minority-owned investment banks. The transaction agreement offers an additional \$115 million of First Mortgage Bonds maturing in Aug. 2016, with a coupon of 5.95 percent. ComEd to use bond proceeds for general corporate purposes and to refinance first mortgage bonds.
- Community Outreach: Wall Street Project satellite offices organize and conduct several protest campaigns and spending moratoriums against giant oil company British Petroleum in response to BPs record price gouging practices, poor health and safety conditions for its workers worldwide, and patterns of racial discrimination or lack of inclusion of minorities in procurement efforts in the company’s executive ranks.
- Community Outreach: Wall Street Project NY conducts Medicare Part D panels, workshops and informational notices to explain the new prescription drug benefit available to the public through Medicare
- Community Outreach: Co-sponsor of the New York City *April 29th March for Peace, Justice and Democracy*.

2007: “A More Perfect Union: Free, But Not Equal”

10th Annual Wall Street Project Conference

“For me and those who have labored and sojourned this freedom passage these 40 years, the vision has always been about equal protection under the law, equal opportunity, equal access to resources; fair trade, and a commitment to the

least fortunate. The realization of the vision has meant nothing less than a willingness to challenge any and all powers that be to: create a level playing field by expanding the marketplace; ensure access to jobs, promotions, education, capital and private investment, and embrace the assurances of the American Dream inclusive of all people.” -

-Reverend Jesse L. Jackson, Sr.

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- Wall Street Project NY launches its first annual Small Business Institute during the 10th Annual Wall Street Project Economic Summit.
 - Blackstone Group LLP successfully came to the capital markets with its \$4.1 billion IPO. Rainbow PUSH WSP worked strategically with Blackstone’s management that agreed to place seven minority and women-owned investment banking firms in the transaction. Blackstone is viewed as a role model for other private-equity firms who are expecting to come to market, where the involvement of minority firms is good business and only enhances performance.
 - AT&T \$500,000,000 bond Transaction with The Williams Capital Group and Blaylock and Company as Co-Managers
 - Golden State Tobacco Securitization Corporation issues \$4,462,151,602.25 of Tobacco Settlement Asset-Backed bonds with M.R. Beal, Jackson Securities and loop Capital Markets as Co-Managers.
 - Testimony by Reverend Jesse L. Jackson, Sr. to the committee on Banking, Housing, and Urban Affairs United States Senate – Wednesday, February 7, 2007 – “Greenling Redlined America”
 - Community Outreach: [Spearheaded by the Automotive Project, launched the Respect Me Coalition Campaign in a collaborative effort with The Los Angeles Sentinel and other women based organizations nationally to respond to the assault on African American women in the public and media.](#)
 - Community Outreach: Wall Street Project satellite offices organize and simultaneously conduct August 28th “Stop the Violence-Save the Children: Rally against East Access to Guns” rallies. New York’s rally convened in Harlem at the Adam Clayton Powell State Office building on 125th Street.
 - March and rally on Wall Street in New York City on December 10, 2007 to put pressure on the corporate community to address the needs of Americans who have been devastated by the foreclosure crisis.

2008: New Congress, New America, New Opportunities: Expanding the Economic Agenda

11th Annual Wall Street Project Conference

“As we rapidly approach one of the most important Presidential elections in our nation’s history, it is imperative that we arm ourselves with the information that will allow us to make educated choices that will shape our future. Learning the hard lessons of Katrina, it is important to glean inspiration from the strength of those who have suffered through and prevailed to empower ourselves to reduce dependency and vulnerability. There cannot be enough emphasis on the power of “we.” As we watch the growing involvement of collective entities such as our churches and schools, the potential for achievement is boundless.” --William D. Dickerson, Chairman, Citizenship Education Fund

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- Visa successfully came to the capital markets with its \$17.8 billion IPO. This transaction topped the 4.5 billion IPO completed by Blackstone Capital in 2007. Wall Street Project strategically worked with Visa’s management to get eleven minority and women-owned investment banking firms included in the transaction.
 - Automotive Project challenged BMW and expressed concern over the actions of their advertising agencies in issuing a “No Urban Dictate” for an upcoming BMW/MINI Cooper ad campaign. Also launched the Global PUSH Collaborator, working closely with eight impaired automotive suppliers whose businesses were imperiled and facing the possibility of business closure with General Motors.
 - Community Outreach: Wall Street Project New York organizes and conducts Mortgage Lenders and Homeowners’ Forum at Hanson Place Central UMC in Brooklyn, New York, in an attempt to prevent homeowners from entering the foreclosure pipeline and/or or modify loans through face to face meetings with the restructuring teams of major lenders to the area.

- Community Outreach: Wall Street Project satellite offices' Voter Registration and Get Out The Vote events and initiatives.
- Community Outreach: Stop the Violence – ongoing campaign to end gun violence and the proliferation of guns in our communities.
- Community Outreach: The Rainbow PUSH Coalition New York Chapter Newsletter is established with the support of Wall Street Project NY. The monthly email newsletter serves the tri-state area by sharing social justice insights, commentaries and articles from Rev. Jackson, local clergy and community leaders and members, as well as tips, tools and links to sources of information related to financial education, health education and state and national campaigns that affect the community.

2009: “Fallout From the Bailout: A New Day in Washington”

12th Annual Wall Street Project Conference

“What we need now is bold, immediate action, an economic recovery plan to reinvest in America and put Americans back to work.” --Reverend Jesse L. Jackson, Sr.

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- Rev. Jesse L. Jackson, Sr. attends House Financial Services Committee hearings and enters prepared testimony into record. Eight banks and securities firms that had received \$165 billion in federal aid were called in to testify. Banks that made an appearance included Bank of New York, J.P. Morgan, Morgan Stanley, Bank of America, Goldman Sachs, State Street and Citigroup.
 - Goldman Sachs Group, Inc. selects Williams Capital Management, LLC, a wholly-owned subsidiary of The Williams Capital Group, L.P., to manage \$1 billion of U.S. treasury and government agency securities.
 - New York Fed names four non-primary dealer broker-dealers as TALF agents—three of which are minority boutiques including: CastleOak Securities, LP, Loop Capital Markets, LLC, and The Williams Capital Group, L.P.
 - Hyatt Hotels Corporation issues \$950 Million IPO with the Williams Capital Group, L.P., Loop Capital, M.R. Beal, Samuel A. Ramirez, Muriel Siebert as Co-Managers.
 - Dollar General issues \$750 Million IPO with Williams Capital and Ramirez & Co. to be part of the syndicate.
 - Paradigm Asset Management, LLC, an African American owned firm, is one of the six firms selected by The U.S. Department of Treasury announces to serve as financial agents for wind-down phase of the Emergency Economic Stabilization Act.
 - Wall Street Project hosts its first Women’s Luncheon program during the 12th Annual Wall Street Project Economic Summit. The program also featured a Women and Wealth Workshop and Women’s Leadership Session focusing on the impact off the economic crisis on diversity initiatives
 - Community Outreach: One Thousand Churches Connected – NY Region organizes with New York Life Insurance Company, a series of comprehensive one-day financial empowerment seminars (“The Church Vanguard Wealth Program”) designed to benefit pastors of churches by providing basic education on asset growth and asset protections options specific to their needs.
 - Community Outreach: Rev. Jesse Jackson, the Rainbow PUSH Coalition and the communities represented by the Wall Street Project satellite offices call on Congress to adopt the Rainbow PUSH Education Stimulus Plan and the Reduce the Rate Campaign which is designed to help college students and their families during this difficult economic period by: reducing the interest rate on federally subsidized student loans to 1%; extending the grace period before loan repayment begins from 6 months to 18 months for students who graduate; ending the penalties assessed to schools for student loan defaults, and Increasing Pell Grants to \$10,000 rather than the proposed \$5,300 in the stimulus package currently under consideration.

2010: “Targeted Stimulus: A Call To Equity and Parity”

13th Annual Wall Street Project Economic Summit

“We can’t solve the foreclosure crisis one house at a time. That’s like dipping a cup in the ocean. We need comprehensive, systematic solutions, bold leadership and a new direction. The challenge is still ahead of us.” – Reverend Jesse L. Jackson, Sr.

“We’re focused on putting America back to work, rebuilding America, with jobs and justice and peace....Detroit and Michigan is ground zero of the urban crisis. It’s time to enact real change for working families and all America. It’s time to reverse the policies that have resulted in jobs and investment flowing out of the country, creating economic hardship for millions of Americans.” --Reverend Jesse L. Jackson, Sr. (August 28, 2010)

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- Reverend Jesse L. Jackson, Sr. enters prepared CRA testimony before the Federal Reserve and other regional regulatory offices.
 - State of New York issues a \$1 Billion Bond transaction with M.R. Beal as the lead underwriter. Historically the largest transaction for a minority owned firm.
 - General Motors issues \$15.774 Billion equity with The Williams Capital, Loop capital, M.R. Beal, Samuel A. Ramirez, Muriel Siebert, Gardner Rich & co., CastleOak Securities and Cabrera Capital Markets, LLC included in the deal.
 - Promote and participate in the August 28, 2010 “Rebuild America: Jobs Justice Peace” march and rally to commemorate the 1963 Detroit “Walk to Freedom” led by Rev. Martin Luther King, Jr.
 - Community Outreach: Wall Street Project joins labor unions, clergy, and other prominent Civil Rights organizations during the regional planning meetings, pre-One Nation Working Together March on Washington rallies, and during the 10-02-10 Labor March on Washington.
 - Community Outreach: Wall Street Project works with Bank of America to promote Home Foreclosure Prevention seminars and loan modification programs.
 - Community Outreach: Spearheaded by the Peachtree Street Project, One Thousand Churches Connected had several on site modification projects throughout the various OTCC serviced regions in cooperation with Wells Fargo a Wachovia Company. In conjunction with Wells Fargo and the *Hands on Banking* program, OTCC introduced the Save our Homes and Churches Financial Literacy and Mortgage Modification Workshop for pastors, financial ministry coordinators and lay leaders.
 - Community Outreach: Wall Street Project satellite offices partner with the 2010 Census to inform the public of the importance participating in the census process.

2011 “A More Perfect Union: Time to Rebuild America”

14th Annual Wall Street Project Economic Summit

“Clearly, too many have been left out of the recovery. In the finest tradition of the New Deal, we need change, bottom up, not top down. We need a targeted plan for jobs, job training, transportation, and education for the future of our children. We are depending on this President and this Congress to meet these needs...Subsidies and bail-out funds given to banks and the wealthiest--without links to investment, job creation and home foreclosure mitigation--has not stopped the bleeding. From the back streets of America, we hear the cries for help. It is a state of emergency that must rise to the top of America’s agenda for 2011.” --Reverend Jesse L. Jackson, Sr.

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- The 14th Annual Wall Street Project Economic Summit convened over 1,500 corporate executives, minority suppliers, political, labor, community, youth and religious leaders. Panel sessions included: Access to Capital, Jobs and Opportunity Plenary highlighting the urban reconstruction agenda and the Dodd-Frank Financial Regulation Bill –

Section 342 and state and local parity initiatives; the WSP's Small Business Institute, a Youth Leaders Seminar and the Wall Street Project Career Development, Retraining and Retooling Panel and Break-Out Session which convened over 200 professionals seeking employment or in the process of changing career paths as a result of the current US economic and employment conditions.

- **HCA Holdings Inc. \$3.8 billion IPO with five minority firms included in the deal:** Samuel A. Ramirez & Co. Inc., The Williams Capital Group, Muriel Siebert & Co., Loop Capital and CastleOak Securities.
- **Nielsen Holdings Inc. \$1.6 billion IPO with four minority firms included in the deal:** Samuel A. Ramirez & Co. Inc., Blaylock Robert Van LLC, The Williams Capital Group and Loop Capital.
- A.I.G.'s \$8.7 billion stock sale with 18 minority firms in the transaction, including Wall Street Project trading partners and colleagues M.R. Beal & Company, CastleOak Securities, Kaufman Brothers, Blaylock Robert Van LLC, Loop Capital Markets, LLC, and The William Capital Group.
- Ongoing work of the WSP to address the failure of banks to provide comprehensive foreclosure relief to homeowners.
- Ongoing monitoring of IPO deals and opportunities to involve minority and women-owned investment banking firms in the transactions.
- Community Outreach: Automotive Project hosts inaugural SAVE A GIRL, SAVE A WORLD intergenerational mentoring weekend event at Bennett College sponsored by Ford Motor Foundation which included 40 high school and college students and 40 adult mentors.
- Community Outreach: One Thousand Churches Connected – partnered with the Micah Institute's (New York Theological Seminary) Living Wage Campaign and participated in the May 12th Living Wage Rally at New York City Hall which was followed by hearings officiated by the New York City Council.
- Community Outreach: One Thousand Churches Connected – organized and co-facilitated with Bishop Andy Lewter the first in a series of interactive *Ministers' Empowerment Meeting and Roundtable Discussions* events at Merrick Park Missionary Baptist Church featuring Bishop Tavis Grant (Rainbow PUSH National Field Director). The series—to focus on strategies to collectively fight the current escalating assaults on Civil Rights, the Church, the working class, the poor and the African American Community—designed to connect clergy, congregants and community via the Internet.
- Community Outreach: One Thousand Churches Connected and Rainbow PUSH co-facilitated a series of Clergy Meetings hosted by Trinity Wall Street to discuss unique intricacies and dynamics of the “Occupy” movements and what role, if any, today's ministers should play in this controversial public movement.

2012 “We Are One World – Bringing Everyone to the Table – Celebrating 15 Years of Access to Capital, Industry and Technology”

15th Annual Wall Street Project Economic Summit

“Our nation thrives when cultural blinders are removed and the opportunity to compete is equitable...This year's summit is a call to action to lift our nation up and broaden the road to recovery by ensuring that the road of the playing field is fair, the rules are disclosed and access exists. We have accomplished a tremendous amount in fifteen years. As we look to the future we need everyone's support to drive our economy back to a leadership position.”

--Reverend Jesse L. Jackson, Sr.

- More than 1,000 attendees from around the globe convened at the Sheraton New York Hotel and Towers for the 15th Anniversary of the Wall Street Project Economic Summit, including bankers, ministers, media executives, legislators and entrepreneurs creating solutions for issues affecting them. Speakers varied from the Chairman/President of Macy's Inc. Terry Lundgren, to NY State Comptroller Thomas P. DiNapoli, to Dr. Julianne Malveaux, to Chairman/CEO of The Peebles Corp. R. Donahue Peebles to Bank of America Sr. Client Manager/SVP Maurice Coleman. Featured sessions included: *The 2012 Wall Street Project Career Symposium* (geared to strengthen transitioning professionals

with empowering tools, resources, skill sets and insights on the new realities for creating, enhancing and managing employment and career opportunities in today's high-tech work environment); *The Wall Street Project Small Business Institute* (which provided key understanding to secure capital in a volatile economy); a *Diversity and Inclusion Best Practices Colloquium*; the *A. Philip Randolph and Rev. Dr. Martin Luther King Labor and Ministers' Luncheon Program*; *Hands On Banking*® educational session for teens and young adults; sessions that offered creative strategies to increase business opportunities and tangible content for business growth; exclusive seminars for policy makers, legislators and executives to discuss and survey specific efforts for advancement, and a platform for the Hip-Hop community to discuss how business practices in corporate America and Hip-Hop can be similar.

- Released the 2012 Wall Street Project Whitepaper “Left Behind”—a project done in collaboration with economist Max Fraad Wolff and students from the New School University Graduate Program in New York City. This thought leadership document covers topics such as: the current state of Wall Street since the recession of 2008, the direct correlation between predatory lending and expanding the wealth gap between non-diverse and African American and Latino homeowners, and what steps corporations, government and advocacy organizations can do to generate recovery, particular focus on job growth.
- Distribution on Wall Street Project's 2012 Employment and Procurement Survey to Fortune 500 corporations toward the understanding of cross industry inclusive best practices.
- Community Outreach: One Thousand Churches Connected – on-going working partnership with the Micah Institute's (New York Theological Seminary) Living Wage Campaign. April 2012: After 2 years of work by the Campaign (to educate public and to work on a bill that would require businesses that directly benefit from millions in city subsidies to pay their workers \$10 an hour; establish a new policy whereby the Economic Development Corporation will strive for a 75% Living Wage goal for all jobs on projects receiving subsidies; and require new wage reporting that will disclose the percentage of living wage jobs on all subsidized projects) the Living Wage Bill passed the New York City Council by a vote of 45 to 5; a margin exceeding the two-thirds majority needed to override a mayoral veto.