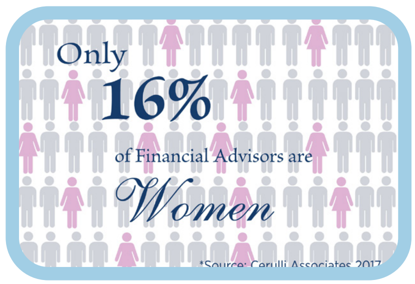
Women's Leadership Alliance

Changing the Conversation
Donor Report 2019 and WLA Update

Dear Friends and Colleagues,

2019 saw the continued advancement of the Women's Leadership Alliance's (WLA) mission *to attract, develop and engage the most promising women leaders in order to grow and strengthen the financial advisory profession to better represent the diverse community we serve.*

The WLA was launched in 2016 by a group of senior women advisors who saw a need to take a different approach to changing the dismal, long-standing reality that approximately 16% of advisors are women.



A board was assembled, an executive director was hired and the WLA became a 501c3 organization in early 2017. The group then set about the business of **'Changing the Conversation'** regarding women in the financial planning profession. WLA's executive director is Michelle Danielson who is home based in the Tampa Bay area of Florida.

Current Officers and Board members are:
Kalita Blessing - President
Judith McGee - Vice President, Secretary
Tracy Vaughn – Vice President, Treasurer
Kimberlee Bouska – Vice President
Mary Carter – Vice President
Kathleen Miller - Vice President
Danielle Page – Vice President
Sherri Stephens – Vice President
Margaret Starner – Vice President

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What’s New

While our first two years were spent building, staffing and funding the WLA to assure long-term sustainability and economic health, this past year found us shifting our focus. By identifying and implementing ways our organization can become a national, industry-wide presence we can provide opportunities for women to effectively learn about, and if applicable, identify ways to enter the financial advising profession.

The WLA founding members at our initial strategy meeting in 2017.

We are in the final stages of assembling an outside advisory board made up of individuals with a diverse cross section of industry experience. This group’s primary goal will be to provide input to the board on how we can further our objective of bringing the WLA to a national industry audience.

We are beginning to explore opportunities to partner with national nonprofit organizations whose mission is to increase financial literacy amongst high school-aged girls as well as promoting the financial planning career within this demographic. While investing in this type of partnership will have a very long-term payoff, we believe these types of partnerships will allow us to change the conversation for not just women, but girls. Educating the tween and teen audience can have a positive impact on the number of girls who explore the financial planning profession once they get into college.

Education & Communication

As you know, we launched our flagship program, the **Leadership Initiative Program** in 2017 within our Raymond James family to test the viability and success of our innovative concepts before taking them nationally. We are pleased to announce we are currently in the midst of our third round of this unique program and look forward to continuing this small group mentoring effort for the foreseeable future. The program continues to deliver value to both mentors and mentees alike.

Susanna Robinson, one of our current volunteer mentors, states - *“Listening hard is the real value in this program, you gain a new and unique perspective.”*

Lynn Phillips, another of our current volunteer mentors commented that - *“I’m learning as much if not more from my mentee as my mentee is learning from me.”*

Kelly Petrocella, a mentee, shared - *“My mentor has been a true life line, sharing her best practices, I appreciate all her help!”*

Jill Carr, another current mentee, said of her participation in the program - *“It changed my thinking about my own personal value and what I have to bring to my clients.”*

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Surveys of past participants indicate the benefits of the program extend well beyond its completion. The majority of mentees have claimed the biggest benefit has been in their increased confidence in conducting client and prospect meetings and asking for business, effectively managing their practices, and in preparedness for succeeding senior members of their practices.

We continue to expand and enhance our website, **www.womensleadalliance.org**, designed in partnership with the fantastic folks at **Idea Decanter**, with real world stories, advice and insight told in videos straight from women advisors at various stages in their careers.

Kimberlee Bouska presenting at Teach for America

Our audience on social media grew in 2019 thanks in part to your participation with our content. The WLA LinkedIn page has the ability to keep our donors and supporters up to date and is an easy way to share our message to a broader, career-focused audience. We continue to grow our email list as well, keeping donors and subscribers current with monthly e-newsletters.

But the **big news** in this report is our crowning achievement of 2019 – the creation of our new microsite. Our research found that there's a distinct lack of comprehensive sources of real-world, objective information on the field of financial advising – especially information that's easy to find and designed for women. That inspired us to design and build **www.MyAdvisorPath.com**.

MyAdvisorPath.com

My Advisor Path

At **MyAdvisorPath.com**, college-aged women and career changers can find an interactive quiz loaded with video stories and practical, real-world advice. There's also a resource section loaded with things like:

Scholarships and Job Listings
Definitions of Certifications she might need
Interview tips to help her get her foot in the door
Links to a variety of investment firms' training programs

We have plans to expand the resources section to give women already in the business a place to go for valuable tools like negotiating contracts, adding team members and succession planning. That's coming in 2020.

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Financial Status

When the WLA was created at the end of 2015, founding members set out to raise **$1,000,000 within 5 years.**

Thanks to the phenomenal response from over 140 individual and corporate supporters (particularly our Legacy and Founder's Level donors), we are so very **close to achieving our goal!**

Call to Action

Thank you for your continued support of our efforts. We could not continue this important work without you!

Please visit our website, www.womensleadalliance.org to learn about how you can become more involved in our mission. Use one of our ready-made presentations available to spread the word in your community, refer women interested in learning more about the career to www.myadvisorpath.com, and continue to share your story to help us "**Change the Conversation**" regarding women in the financial planning profession.

Please direct any questions or comments to Michelle Danielson at michelle@womensleadalliance.org.

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