



2020

WLA ANNUAL
DONOR REPORT



Women's Leadership
Alliance

Changing the Conversation

Address

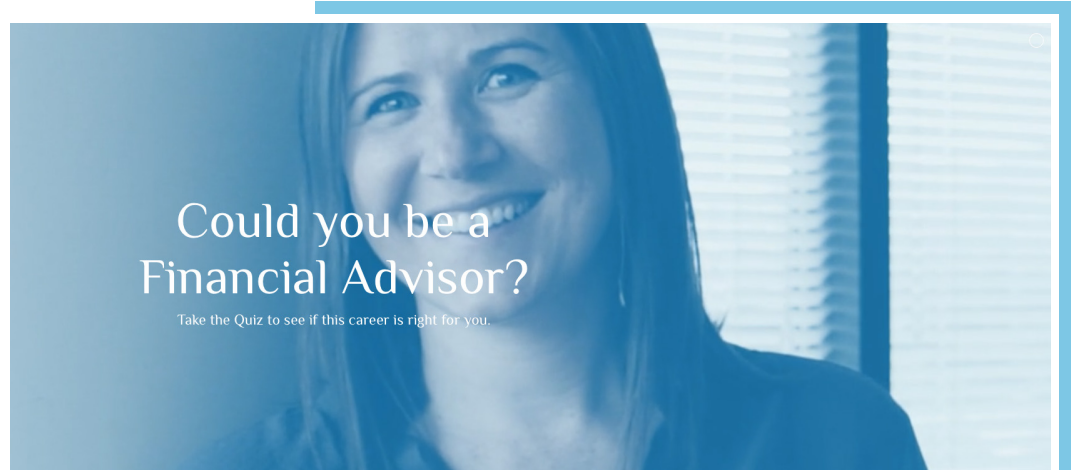
Women's Leadership Alliance
131 Second Avenue North, Suite 200
Jacksonville Beach, FL 32250

Dear Friends and Colleagues 2020 – hmmm.... where do we start?

Undeniably, it was a year like no other. Our plans were cancelled. Our lives were changed. And despite all of the obstacles thrown in our way (homeschooling, mask-wearing warriors), we all moved forward.



Think of it this way, we are on a highway together and on our 2020 journey the WLA passed some important milestones while managing a few unexpected detours. Yet, the WLA's final destination never changed. We're on a mission to *'attract, develop and engage the most promising women leaders in order to grow and strengthen the financial advisory profession and better represent the diverse clients we serve.'*



2020 began full of opportunity for the WLA to continue to **'change the conversation'** among women regarding a career in financial advising. Many months of work and collaboration with our marketing partners, Idea Decanter, culminated in the release of our innovative, career-focused website, myadvisorpath.com.



We planned to actively promote this innovative and informative website at both Raymond James and other industry conferences and events throughout the year; then along came COVID. We shifted gears and utilized our monthly newsletters and [LinkedIn page](#) to raise awareness of this new resource.

In Spring it became evident that meetings, conferences, and events would be held virtually for the foreseeable future. The WLA quickly regrouped and assessed where we could provide value and support to women advisors across the industry. Out of this assessment came



the “**You are Not Alone**” interview series, where WLA board members shared their experiences and advice for dealing with the challenges presented by working from home, coordinating home schooling for kids and the myriad of additional difficulties presented by the COVID lockdowns.



Summer 2020 brought much more of the same - continued COVID spikes, more testing troubles, more meetings and conferences being conducted virtually. In spite of this, we continued to press forward with our flagship offering, the WLA Leadership Initiative Program. In order to expand awareness of the program, we partnered with the Raymond James Network for Women Advisors to disseminate the application to all qualified women advisors at the firm. As a result, we had a record number of applications and were able to assemble our largest contingent to date as we approached the 100-participant mark in this program.



Summer also saw the launch of our sponsorship program pilot with the University of Portland which provides financial support to a qualified female student on the CFP® track in their business school. Using this pilot as a guide, we recently entered into partnership with two additional schools: The University of North Florida and Minnesota State University - Mankato and will begin offering sponsorships at these locations in Fall 2021.

Both of these relationships were formed as a result of recommendations from donors.



By Fall, virtual conferences were the norm and the Raymond James Women’s Symposium was no exception. Since we historically delivered the core of our mentor program training and orientation at this event, the WLA had to once again pivot and reimagine how we could deliver this essential component of the program virtually. We capitalized on our newly gained Zoom expertise (admit it - who had ever heard of ‘light rings’ prior to the pandemic?) to effectively train our participants.



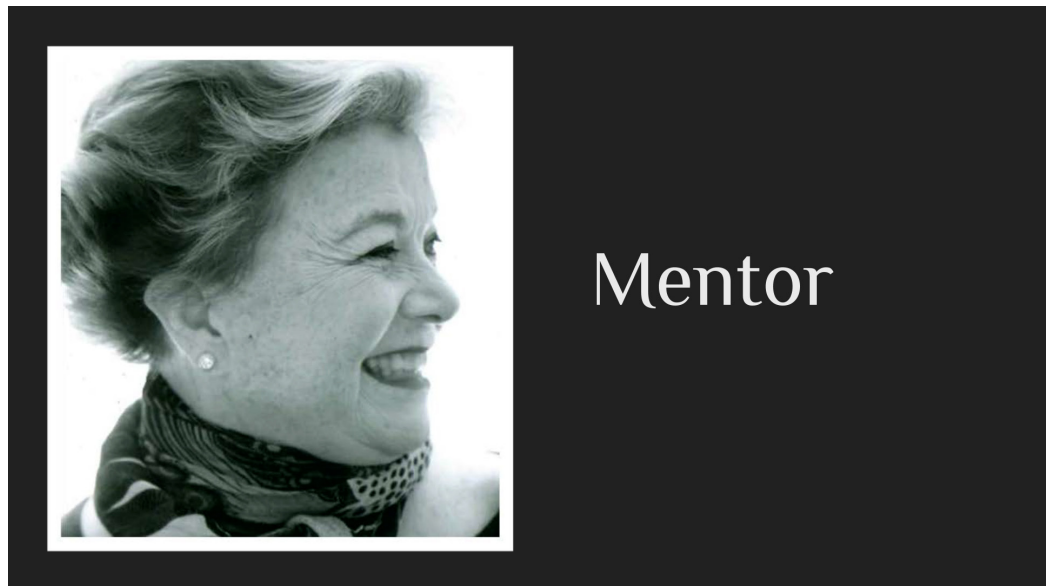
December was a busy month for the WLA. We were elated to achieve a goal we had set at the inception of our organization back in 2016 ... reaching \$1 Million in pledges and donations within 5 years. And thanks to the generosity of our donors, we hit that milestone **8 months early!**



We also had the opportunity to participate in the Girls, Inc “**Full STEAM Ahead**” program which invites local organizations to present information about their industries in a fun, interactive way to a group of young female students. One of our board members led a week-long after school (albeit virtual) workshop to engage these girls in conversation and activities designed to inform, educate and excite them about the potential a career in financial planning can provide. We look forward to continuing to participate in activities designed to create financial awareness and literacy among girls in this age group.



The end of the year also brought exciting news regarding our dear friend Sally Law. Sally was a founding WLA board member and a pioneer for women in financial planning. Sadly, we lost Sally in 2018 but knew from that time that we, as an organization, wanted to memorialize her in a meaningful and significant way. After over two years of discussions and thoughtful consideration, we are very pleased to announce The Sally Law Initiative, a program that will create pathways for female college students who would not otherwise have the opportunity to become educated about the financial advisory profession.



These pathways will include not only financial assistance in the form of sponsorships to cover a portion of tuition, but also mentorship and ongoing support. Our goal is to create a community around these individuals to not only impact their ability to achieve success, but to also make it possible for them to make a positive impact on others in their own communities.

We have secured the initial funding for this large-scale, nationally focused effort and are assembling a team of key advisory members to develop the strategic plan. We anticipate piloting the initiative later this year. Look for more information regarding this in the months to come!

As we close the page on 2020 and begin a new year, we want to thank you once again for your support. We could not continue to do this important work without you!

...→ AHEAD

- Please visit our website, www.womensleadalliance.org to learn more about how you can become more involved in our mission.
- Share our www.myadvisorpath.com website with women who are interested in learning more about a career in this profession.
- Please direct any questions or comments to Michelle Danielson at michelle@womensleadalliance.org.



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