



Women's Leadership  
Alliance

Changing the Conversation

# Annual Report

2021

## A Message from Women's Leadership Alliance Board Chair

As most of you know, if you read our newsletter from December, we said goodbye to our first Executive Director, Michelle Danielson. Michelle was perfect as the WLA's first ED as we strove to get ourselves together organizationally, to focus on our mission. Michelle helped us get our first major initiative, the WLA's pilot mentorship program with Connie Deianni as the facilitator, off the ground, and we can now say that we have ushered more than 100 mentors and mentees through the program successfully.

We wish Michelle every success in her new role, as she launches her husband's new veterinary practice.

This year, we enthusiastically invited Stephanie Gularte to become our next Executive Director. She attended our first in-person board meeting on January 26 in Tampa, FL, where she guided us through.

Stephanie brings a wealth of nonprofit experience to the table, working with both start-ups and established nonprofit organizations, most recently as the CEO of American Stage Theatre Company in St. Petersburg, FL. Stephanie has a track record of working with nonprofit boards, bringing people and communities together, to build impactful and sustainable nonprofit programs.

On behalf of the WLA Board, I can share that we are very excited about the new initiatives we are undertaking this year, from building our student sponsorships at universities with focused financial planning programs, to building out the Sally Law initiative, to amplifying our mission to increase awareness of the financial advisory career path among a broad diversity of girls and women. Stay tuned in the coming months for more updates and details on these inspiring developments.

As always, your support for the WLA is deeply appreciated. As a nonprofit, 501(c)(3) organization, our initiatives and programs are made possible through generous contributions from people like you. Thank you.



Sincerely,  
Kalita Blessing, CFP®, CAP®, AEP®  
Wealth Advisor  
Board Chair

## A Message from the WLA's new Executive Director

When I was first approached by Michelle Danielson about the Women's Leadership Alliance, I felt an immediate connection to the organization's mission. Growing up working in and around my family's small businesses, I was fortunate to learn early lessons that would instill in me an entrepreneurial sensibility. As an adult, I followed my passion for collaborating with and empowering others and for building a sense of community through nonprofit leadership. The alignment of these two aspects of my personality, an entrepreneurial spirit and a strong drive to empower others, has guided me to opportunities that have allowed me to build strong and successful organizations and programs while amplifying the talents and abilities of others.

That is exactly what I hope to do in my role as Executive Director for the Women's Leadership Alliance. I am excited to be in the position to learn about the inspiring career options available in the financial advisory profession, while providing women with the encouraging and resources to have their lives enriched by helping them discover the opportunities available to them in this industry.

I bring over 20 years of nonprofit leadership experience to WLA, working with both startups and established nonprofit organizations. My experience of bringing people together through passionate engagement, including board members, supporters, and community stakeholders, has allowed me to build impactful nonprofit programs - programs that are sustainable for years to come. As a certified coach, a trainer with the Nonprofit Leadership Center of Tampa Bay, and a Nonprofit CEO Circle facilitator, I'm dedicated to helping leaders and nonprofits thrive.

Over the next year, as I continue my own education about the WLA and our incredible partners, I am inspired to help move the needle in gender representation and to engage a diversity of women in this industry. It's thrilling to be leading an organization founded by women who are not only highly successful in their fields, but who share a passion for their profession and are committed to helping other women discover the possibilities available to them.

Thank you for your continued support of the WLA as we grow and expand our partnerships around the country in order to open more doors for more women for many years to come. I look forward to meeting you in the coming year!



Sincerely,

A handwritten signature in blue ink that reads "Stephanie Gularte".

Stephanie Gularte  
Executive Director

# Mentor Program 2020-2021

The Women's Leadership Alliance's uniquely impactful Mentor Program continued successfully in the midst of the pandemic. Designed around providing formal training for mentors while providing impactful and tailored support to help mentees achieve their individually set goals and objectives, program built around women empowering other women helps to ensure that women working as financial advisors have the tools to reach unlimited heights in their careers.

[Read on to learn more about the past year's program:](#)

## **A Message from our Mentor Program's "Secret Sauce," Connie Deianni**

In October 2020, we launched our 4th edition of the WLA Mentor Program with 13 pairings of exceptional women across the country. Launching the program with COVID-19 still raging in the world was a gamble, but one that paid off for the participants and, we hope, the industry.

As all 26 women participated in Zoom training over a three-week period, it was clear that we had a dedicated and committed group of professionals eager to get started on sharing knowledge, stories, insight, best practices, and camaraderie. The engagement would prove to be a welcome respite from the drudgery of COVID protocols.

Over the next six months, these women engaged in bi-monthly exchanges based on the goals set forth by the mentee early in the program. As they worked to establish long-distance relationships with each other, they also gained an appreciation of what women were facing in their respective practices as they searched for new ways to engage and enrich clients' lives.

During our monthly feedback call sessions, we were hearing about how confidence was growing through shared stories of overcoming obstacles in the past. We were listening to women explain how they now realized they didn't need to do this "all by themselves." We were learning new ways to support each other and engage with clients on a level unknown before COVID.

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Some of our favorite quotes from this cohort were, “loved the pay it forward concept, grab one more hand and bring them with you” and “I have fallen in love with my business again”.

**“Loved the pay it forward concept, grab one more hand and bring them with you”**

The mentees in this program even developed their own breakout group headed by Jamey Hendricks, where they set up a Zoom call just for mentees to get together and share best practices and ideas and support each other. This is the power of the program where women continue to look for grass-roots ideas to propel each other forward in the industry.

As one mentee commented, “I felt like I was in a competitive world, and now I feel like I belong to a tribe of women who have my back.”

**“I felt like I was in a competitive world, and now I feel like I belong to a tribe of women who have my back.”**

As we faced the challenges of mentoring long distance in a COVID world, we realized that we are all connected through shared stories, experiences and knowledge. This years’ Mentor Program helped make our daily lives a little more cohesive and provided a virtual shoulder to lean on during the hard times.



Connie Deianni  
Corepoint, Founder  
WLA Mentorship Program Consultant



# Meet two of our 2020-21 Mentees



**JILL C. GRIFFITH, AAMS®**  
Financial Advisor

In 2015, I made a career change to join my uncle and business partner, Phil McAdams, in the financial services industry. Prior to joining his practice, I worked in a variety of roles in small businesses, including market research project management, human resources, and sales/marketing. We joined Raymond James in 2017.

With a few years of experience under my belt, the WLA mentorship program provided the opportunity for me to connect with other women advisors to gain insight into best practices and to grow professionally. Connecting with my mentor, Janet Nichols, challenged me to push myself in new ways and helped me develop a road map for the future of my practice.

I learned a tremendous amount in this program but the most impactful thing I took away was understanding the value of my expertise. I learned not to shy away from setting fees, and that it is okay (and even important) to set account minimums in order to best serve my existing clients and attract clients that are a good fit for my practice.

**Janet helped me begin to overcome my struggles with “imposter syndrome” that stem from being relatively new to the industry, as well as being one of only two women advisors in my branch at the time.**

Through the WLA Mentor program, I was also able to connect with various subject matter experts who openly shared their knowledge and expertise on topics I wanted to explore. I highly recommend this program to any women advisors who are considering it, whether you're starting at square one or want to fine-tune your existing business to reach your goals. Connecting with other women in the field and building your network of supportive colleagues is invaluable.

# Meet two of our 2020-21 Mentees



**JAMEY R. HENDRICKS**  
Wealth Manager

I had just hired an assistant and was really disorganized with my business. I didn't have a project management system, and really the business was very reactive instead of proactive. I was missing tasks, not using my calendar fully, and very disorganized in general.

I wanted someone who could help me get the day-to-day tasks done efficiently. I also transitioned my business to a fee-based practice and needed help on how to manage that.

I gained tons of valuable insights from my time with my mentor! Project Management, Calendar use, Practice Management usage, she helped with presentation systems for clients, we would build models for fee-based and she helped me learn to delegate to my assistant and work as an owner, not a manager.

**I think the WLA's mentorship program is a must if you want to grow a practice and to work as an owner.**

The insight I was given was and is tremendous. I also became friends with other mentees in the program. This was very helpful since they would bring things up that I hadn't thought about to ask my mentor. We still meet once a month to go over how our practices are doing. We share advertising ideas, social media ideas, practice management implementation ideas and so on.

I'm grateful Raymond James and the WLA offered this program. It made me fall back in love with my work, build confidence with my clients, spend less time being reactive, and become more proactive in my work and in balancing my entire life!



## 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.

## Core Initiatives

### Education

Teach more women about the financial advisory profession as a rewarding career option.

### Engagement

Advocate for the financial advisory profession by providing opportunities and information to women considering careers in financial planning.

### Leadership

Encourage men and women to mentor, support, and advise women regarding a financial advisory career path and to advocate publicly for the profession.



# Signature Programs

## Leadership Development Mentor Program

The WLA's flagship program has just completed its fourth year. Through the crafting of a tailored experience mentees are given a unique opportunity to expand their skills and to have their individual goals supported through empowering mentorships.

## Career Path Support

Through our MyAdvisorPath.com tool, the WLA provides valuable information and resources to guide women who are choosing their career or who are considering a mid-career change on a potential path to becoming a financial advisor.

## College Student Sponsorships

Through financial grants to cover tuition and fees the Women's Leadership Alliance is committed to helping reduce or eliminate financial barriers for women in pursuit of an education to become a financial advisor or planner.



We've got big plans for the Women's Leadership Alliance! Here is a glimpse at our key strategic goals for the coming year. Stay tuned for further details on each of these big-picture initiatives!

Launch Sally Law Program

Build New Partnerships Around the Country

Elevate the Profile of the WLA and its Mission

Expand the Reach and Impact of Programs

Expand Education and Outreach Initiatives



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