



Women's Leadership  
Alliance  
Changing the Conversation



# Annual Report

2023



## A Message from Our Founding Board President

Serving as the founding Board President of the Women's Leadership Alliance, these past eight years, I am inspired by the amazing journey we embarked on together. To make way for a new generation of leadership, a good best practice for Board leadership is to pass the baton every 3 to 5 years. We had some growing pains the first few years, so my tenure was a bit longer. All that said, the mission of the WLA remains near and dear to my heart. I plan to remain actively involved in the organization as we continue to advance our mission of attracting, supporting, and empowering women in the financial advising profession.

This past year has been marked by significant milestones and achievements for the Women's Leadership Alliance including:

- **New Strategic Plan:** After a thoughtful and inclusive planning process, our board approved and launched an exciting new strategic plan that will guide our organization's growth and impact in the years to come.
- **New Board President Elected;** Beginning in 2024, Kimberlee Bouska took over the Board President role with enthusiastic support from the full board to lead our organization into its next chapter.
- **Board Diversification Commitment:** As a founding board, our members recognize the importance of diversifying our board of directors and adopted board term limits and established recruitment goals to ensure a continuous influx of fresh perspectives and ideas to drive our mission forward.
- **Advisory Board Formed:** A long-standing goal for the WLA was realized in 2023 as we formed an advisory board comprised of amazing women leaders from across the wealth management industry who will begin providing strategic guidance and partnership to the WLA in 2024.
- **Growth of Highly Curated Female Mentor/Mentee Program:** Our mentorship program continues to thrive, offering invaluable support and guidance to women in the financial advising profession.
- **University Partnerships:** The WLA increased our investment in programs with universities to attract and support women in choosing a financial advising career path.
- **New Ambassador Community:** The WLA Ambassador Program was launched to expand our reach and impact within the financial advising community. This nationwide membership community will become the core of our advocacy and empowerment efforts among financial advising women.

Since its inception, the evolution of the Women's Leadership Alliance has been driven by a collective passion and commitment of some amazing women leaders. I am inspired by the progress we have made in our first few years to advance our mission of empowering more women to join and stay in the financial advising profession. As most of you know, there are few other professions that offer women the potential for such significant personal and economic reward.

Thank you for your unwavering support and dedication to the Women's Leadership Alliance. Together, we can and will continue to make a difference and empower women to achieve their full potential in this fulfilling profession.

With Gratitude,

A handwritten signature in black ink that reads "Kalita Blessing".

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

## A Message from the WLA's Executive Director

The year 2023 at the Women's Leadership Alliance was most notable for the launch of a new strategic plan that has focused our mission and catapulted the impact and reach of our programs designed to advance more women in the financial advising industry.

### Changing the Narrative

Throughout the year, we had the privilege of spotlighting the talents and stories of women who found their path to financial advising. These women have shared their journeys as a testament to the opportunities for women to define their individual paths, building fulfilling careers that honor their values and reward their talents. Sharing these stories with students and career changers, serves to dismantle stereotypes and inspire more women to pursue careers in finance. Our efforts to change mindsets, redefine cultural assumptions, and promote gender equality in the financial advising sector is central to creating a more inclusive industry prepared to serve an increasingly diverse population of clients. A highlight of this story-telling effort was our very special HER TRAILBLAZING PATH event, in honor of Judith McGee. Judith's pioneering impact on the role of women in wealth management has been nothing short of remarkable. Her retirement created the opportunity to shine a light on what is possible for women in this profession, as well as to recognize that, we still have a great deal of work to connect more women to this profession, and more strides to make toward supporting their success and leadership as they enter a heavily male-led industry.

### Attracting, Retaining, and Empowering the Next Generation

This year we deepened our partnerships with students and universities through outreach efforts, internship placements, and funding support to build onramps for women to the financial advising profession. In 2023, the WLA welcomed our largest mentorship cohort to-date. Matching twenty female advisors, each driven to build the confidence and skills to thrive in this profession, with twenty experienced female advisors passionate about "paying forward" and by supporting the success of the next generation, the WLA mentorship program now boasts an alumnus of more than 160 women, engaging in thousands of hours of career development mentoring.

### Building a Nationwide Community for Increased Impact

Perhaps the most exciting effort at the WLA in 2023 was the launch of a nationwide membership community of female advisors and industry allies. Our Ambassador community has been created to offer career development resources and support, as well as to organize a community of advocates contributing to efforts to increase awareness of the financial advising profession among women in communities, schools, and institutions throughout the country. Our population of Ambassadors in this newly formed community include men and women from a wide variety of firms, companies, and titles from across the industry. Over time, we anticipate this community growing into an invaluable source of support and advocacy for women at all stages of their financial advising careers.

### Sustainability and Looking Ahead

As the WLA invests in growing our programs and outreach, we also continue to prudently manage our resources, growing and diversifying donor engagement, and cautiously managing funds to ensure long-term, sustainable operations and programmatic impact. In 2024 and beyond, we look forward to sharing with our stakeholders significant strides in working across the industry to further advance our mission to increase the number of women entering the financial advising profession, and increasing retention and success.

As a nonprofit 501(c)3, donor support is essential to our impact and the WLA is exceptionally grateful for the generosity of our stakeholders who believe in our mission and in our capacity to effect positive change.

Onward Together!



Stephanie Gularte, Executive Director



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# Strategic Goals 2023-2025

## 2023-2025

### STRATEGIC DIRECTION

#### OUR VISION

A transformed financial advising industry in which women comprise an equitable representation at every level.

#### OUR MISSION

The Women's Leadership Alliance is committed to **attracting, developing, and empowering** women to build thriving and fulfilling financial advising careers.

#### OUR CORE VALUES

EMPOWERMENT

COLLABORATION

COMMUNITY

DIVERSITY

#### WLA METRICS OF SUCCESS

- Ambassador Community size, diversity and engagement
- Number and diversity of mentees
- Mentor volunteer hours invested
- Professional outcomes of mentees
- Number of student internship placements
- Number and amount of scholarship awards distributed
- Online engagement with WLA resources
- Number of WLA donors and total contributions
- Corporate and grants funding support received
- Staff and systems effectiveness
- Board and Advisory board size and diversity

#### STRATEGIC

#### PRIORITIES



WomensLeadAlliance.org

The Women's Leadership Alliance is a nonprofit 501(c)3 organization dedicated to attracting, developing, and empowering women to build thriving & fulfilling financial advising careers.

## 2023 Ambassadors

# Ambassador Program Launched October 2023



The WLA Ambassador Community was created to organize and energize a nationwide movement to grow and advance the representation of women in the financial advising profession. With a diverse membership community that includes financial advisors, industry leaders, educators, students, advocates, and allies throughout the country, the ambassador community promotes resource sharing, provides career building experiences, and cultivates regional advocacy efforts to attract and advance women in the financial advising profession.

Tracy M Alm  
Elisabeth Andreason  
Victoria Azpurua  
Ellenore K Baker  
Bethany Beebe  
Audree Begay  
Erin Bethge  
Kalita H Blessing  
Theresa Boulos  
Kimberlee A Bouska  
Michael Burman  
Morgan Cain  
Nicole Caringal  
Jill Carr  
Mary Carter  
Katie Centofonti  
Natalie Berning  
Tracy Christensen  
Alexa Comey  
Lindsay Corneille  
Jackie Schlup Daniels  
Constance Deianni  
Mariah Faith Doyle  
Melissa S Dyer  
Lori Endicott  
Lanta Evans-Motte  
Barbara Finder  
Anabel Fraga  
Maria Fraile  
Randall Gerber  
Dr. Pamela Grey  
Jill Griffith  
Fara Grim  
Alea Groshek  
Stephanie Gularte  
Cydney Gutridge  
Erin Hadary  
Patty Hammond  
Janice L Henderson  
Jamey Hendricks  
Jacquese Hill  
Marla Hinman  
Jenny Hite  
Lizzette Inchaustegui  
Melissa Joy  
Tricia Kasner  
Teri Kelley  
Glenda Kemple  
Heidi L King  
Amber Knips  
Tayler Kottinger  
Kelli Lanino

Kjersten Lazar  
Nancy Leizman  
Deborah LeMoine-Hickey  
Veronica L. Logan  
Nicole Louvar  
Micheal Macco  
JoAnn MacWilliams-Wolf  
Judith A McGee  
Kasha McLemore  
Kristina M Meyers  
Kathleen Miller  
Megan Miller  
Janet Moses  
Jennifer Napper  
Maya Nelson  
Brooke Nelson  
Leslie Nettles  
Gretchen Olsen  
Abraham Ovalle  
Danielle R Page  
Elizabeth Peterson  
Kimberly A Phelps  
Frances Povloski  
Julie Pressnell  
Traci Richmond  
Madison Rivers  
Misty Robertson  
Casey Sage  
Iyanu Saka  
Amanda Schneider  
Colleen A Schon  
Ray Sclafani  
Beverly Shean  
Kaylee Smith  
Emily Smith  
Florence Smith  
Margaret Starner  
Ariel Stein  
Sheryl Stephens  
Lindsey Stuart  
Kristy Sullivan  
Tatiana Sunik  
Kristen Trovas  
Katie Tyrrell  
Jessica Valera  
Tanya Wandoff  
Sasha Watson  
Laura A Webb  
Rhonda Lynn Weinman  
MaryAnn White  
Rex Whiteside  
Charlotte Willis



I joined the WLA Ambassador community as an early-career ambassador to connect with successful women in the profession, further my career by learning more about how to help women clients, and be an advocate for diversity and inclusion in my firm and the industry."

-Morgan Cain, Macco Financial Group  
Early-Career Ambassador



I am a business owner and I enjoy advocating for women in the financial industry and other fields. I am for empowerment in this financial industry and would like to see some change.

-Lindsay Corneille, Family Legacy Wealth Partners  
Ambassador



The WLA isn't just about finance; it's about rewriting the narrative for women in this profession. We empower, educate, and elevate each other because there's room for all of us at the table. My goal as Chair is to help connect women from across the country to a network where they can share their experiences, insights, and shape the future of women in financial planning."

-Iyanu Saka University of North Florida  
Student Ambassador

# Mentorships and University Partnerships

7 years

168 Participants

2646+ Hours

\$0 Cost to Mentees

## Woman to Woman Mentorship Program:

*You can't be what you can't see*

The WLA mentorship program provides one on one professional development mentoring to women in their financial planning careers through the support and experience of another female financial advising professional. Mentors and mentees participate in a facilitated training to launch a successful mentorship relationship. All program participants become members of the larger WLA mentorship community to further expand their professional network.



## University Partnerships:

*Bringing possibilities to light*

The WLA partners with universities to increase visibility of the financial advising profession among college women and to provide opportunities, resources, and support to female students. To-date, the WLA has committed over \$200,000 in support that provides student ambassador resources, professional networking, curated internship experiences, and scholarship support.



University of North Florida & Minnesota State Mankato

\$200,000

Invested in Students

# Honoring Judith McGee



In 2023 we honored one of our own, WLA co-founder Judith McGee, and celebrated her extraordinary trailblazing career path in the financial advising industry. The virtual fundraiser brought together professional leaders, women of distinction, and a community of allies and advocates for women in the financial advising field across the country in support of WLA programs dedicated to attracting, developing, and empowering women to build fulfilling and thriving financial advising careers.

The experience gave the WLA the opportunity to galvanize our purpose and expand our community as we work together to change the conversation. The evening's video storytelling and personal messaging chronicled the details of Judith's life and professional path and included a touching, personal message from Judith's daughter, Linette Dobbins.

The event concluded with words of inspiration from Judith herself:

“Live selflessly, knowing that what we leave behind, and the experiences of others – clients, family, or friends – are really what makes this life important.”

-Judith McGee

# Her Path

## Spotlighting women in the FA profession.

Compelling video and blog stories that help dispel old assumptions about the field of financial advising to help women discover the paths and possibilities available to them.

### Christine Mills



Christine is a financial planner wearing many hats. Christine Mills, AAMS, Financial Advisor, Raymond James, believes financial planners wear many hats and represent the best of relationship management. She is passionate about empowering others to include the diverse backgrounds of today's clients and building upon those relationships. Hear how Christine's own path was shaped through diligence and perseverance.

[womensleadalliance.org/financial-planning-more-inclusive/](https://womensleadalliance.org/financial-planning-more-inclusive/)



### Cydney Gutridge



Cydney's Journey, Part Two: She's on her way! Cydney Gutridge is a new financial advisor and WLA Ambassador who is sharing her early-career path with us. And you won't believe what Cydney's accomplished since we last heard from her!

[womensleadalliance.org/cydneys-path-part-1-2/](https://womensleadalliance.org/cydneys-path-part-1-2/)



# WLA Circle of Support

As a nonprofit 501(c)3 organization, the WLA deeply values our donors and supporters who help to advocate for and expand the impact of WLA's mission. Together we can succeed in engaging and empowering more women in the financial advisory profession.

## WLA Board of Directors

Ellenore Baker  
Kalita Blessing  
Kimberlee Bouska  
Mary Carter  
Pamela Grey  
Judith McGee  
Kathleen Miller  
Danielle Page  
Margaret Starnier  
Sterri Stephens  
Laura Webb

## Founding Donors

Founding Donors contributed \$10,000+ and Legacy Donors\* contributed \$25,000 in WLA's founding year.

Bella Allaire	Vincent Campagnoli	Tom James	Jodi Perry	Sue Spellman
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				Dennis Zank

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