



Women's Leadership  
Alliance

Changing the Conversation



Annual  
REPORT  
2024

# A Message from WLA Board President

I can't describe what an honor it was to become the WLA President this year. Many years ago, I had heard whispers about the founders meeting to discuss starting the WLA, and I was intrigued. I was then in attendance at the conference where the WLA was launched, and I was energized. I immediately recognized that this was an organization I needed to support and became a Founder donor. I was asked to join the board in 2018 and became a volunteer and mentor. Since then, I've seen the dedication our founders have brought to our mission and I'm excited to lead us into the next chapter.

“ I am happy to report that 2024 was a year of tremendous growth for the WLA. ”

In our ultimate mission of attracting more women to the financial advisory business there has always been a focus on creating an industry wide, firm agnostic, organization. Over the past year, we have made more progress towards this effort than ever before. With outstanding leadership from our Executive Director Stephanie Gularte, and the visionary work of our board members, we have seen the addition of several new initiatives. The year marked the inception of an Advisory Board to our organization comprised of highly accomplished women from Merrill Lynch, JP Morgan, Morgan Stanley, Ameriprise, Raymond James, as well as independent offices. We now have input from, and connections to, a large swath of the financial advising community. We look forward to the insights, ideas, and partnerships this will bring. We all agree, diversity is a strength, and these women are excited to lead us into the next chapter.

We also recognize that the women within the WLA community are by far our greatest asset. This led us to leveraging our community in new and exciting ways by growing our Ambassador membership throughout the country and forming Ambassador Circles. When we collaborate and help each other, we all win.

While not new to 2024, our partnerships with universities continue to include student scholarships and curated internships that reduce barriers and create positive early experiences to inspire the next generation of female financial advisors. You might even see the students wearing WLA jackets at national financial planning competitions.

Lastly, our mentorship program continues to thrive. More WLA women than ever are volunteering their time to other women advisors to help them elevate their practice and grow their confidence. Our one-on-one, woman-to-woman advisor mentorship program promotes retention while transforming lives and careers. By providing guidance and support, we help women navigate their paths in this industry, ensuring they thrive and succeed. Many women found the experience so rewarding, they are participating again, and previous mentees are coming back as mentors to pay it forward. I'm encouraged by our progress and can't wait to see what 2025 brings.

Thank you for your support and if you haven't already done so, be sure to join our Ambassador Community!

Sincerely,

Kimberlee Bouska, CFP®, CRPC®, CDFA®  
Investment Management Consultant  
Financial Advisor, RJFS  
Addison Avenue Investment Services



Kimberlee  
Bouska

# A Message from the WLA's Executive Director

I am excited to share the remarkable progress we've achieved together at the Women's Leadership Alliance (WLA) and outline our vision for continued growth in 2025. Your support as a member of the WLA community has been instrumental in driving our mission forward, and we look forward to the journey ahead.

## Advancing Women in Financial Advising

At the WLA, our commitment to transforming the financial advising profession remains steadfast. Despite the slow pace of change in women's representation over the past two decades, we believe that a comprehensive approach is key to driving progress. In 2024, we expanded our mentorship program and student internships, while also launching impactful new initiatives aimed at fostering industry-wide advancements.

## Empowering Women, Transforming the Industry

Since launching our Ambassador Community in October 2023, we have seen significant growth in our membership, encompassing current and aspiring advisors, as well as industry allies. Our ambassadors form a dynamic network focused on mutual support and collaboration to recruit and advance more women in the advising profession. In 2024, the merging of the Female Advisors Network into the WLA Ambassador Community further broadened our reach and Regional Ambassador Circles are now forming across the country. These circles are vital in creating organized networks that enhance our efforts to attract and retain women in the field.

## Collaborating for Industry-Wide Change

In 2024, we established the WLA Advisory Board, which includes distinguished women from leading firms and RIAs around the country. The expertise represented on this board is crucial for collaborating with our board of directors to develop firm-agnostic solutions aimed at enhancing gender inclusion and representation within the industry. In January 2025, our convening at the NYC JP Morgan offices, resulted in an

“ in-depth planning session, where our leadership strategized on the direction of our initiatives and the expansion of our industry-wide influence. ”

Over the coming months, we'll be sharing more specific outcomes of this collaboration to drive meaningful change.

## Partners in Progress

As a 501(c)(3) nonprofit organization, our initiatives thrive thanks to the generosity of supporters like you. Together, we can continue to transform the financial advising industry into a more inclusive space that reflects the diverse needs of the clients and families we serve.

Thank you for being a valued partner in our mission. We look forward to the exciting journey ahead!

Warm Regards,

Stephanie Gularte  
Executive Director  
Women's Leadership Alliance



Stephanie  
Gularte



Women's Leadership  
Alliance  
Changing the Conversation

# 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.



**EMPOWERMENT**

**COLLABORATION**

**COMMUNITY**

**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.

# Annual Report 2024

The WLA is committed to transforming the financial advising profession by creating an inclusive, equitable, and empowering environment for women. A core focus of WLA's strategic vision is to drive gender equity and inclusion by fostering spaces where female advisors and industry allies can work together to attract, retain, and elevate women across all levels of the profession, positioning the organization as a national leader in the movement to empower women in financial services.

## Board of Directors

The Board of Directors is the fiduciary body responsible for overseeing the implementation of the WLA's mission, ensuring fiscal accountability and ensuring the organization's strategic direction and operational integrity, safeguarding its long-term sustainability and impact.

**Kimberlee Bouska**  
President  
*Addison Avenue Investment Services*

**Danielle Page**  
Vice President  
*The Page Group of Raymond James*

**Ellenore Baker**  
Treasurer  
*Carter Financial Management*

**Judith McGee**  
Secretary  
*Mercer Advisors, Retired*

**Kalita Blessing**  
*Mercer Advisors*

**Mary Carter**  
*Beachside Wealth Partners*

**Pamela Grey**  
*Advancing Minds Foundation*

**Teri Kelley**  
*Viewpoint Wealth Management Group  
of Morgan Stanley*

**Kathleen Miller**  
*Mercer Advisors, Retired*

**Nina O'Neal**  
*AIM Advisors*

**Margaret Starner**  
*The Starner Group of Raymond James*

**Sherri Stephens**  
*Stephens Wealth Management Group*

**Laura Webb**  
*Webb Investment Services*

## Advisory Board

The Advisory Board serves as a strategic advisory body that provides recommendations, resources, and diverse industry perspectives to advance the mission of the WLA.

**Tricia Kasner**  
Chair  
*Barron's, Retired*

**Maria Daley**  
*Perigon Wealth Management*

**Edythe De Marco**  
*The DeMarco-McCarthy-Florio Group  
Merrill Lynch Wealth Management*

**Hollis Montgomery**  
*Morgan Stanley*

**Geri Pell**  
*Rise Private Wealth Management  
Ameriprise Financial Services, LLC*

**Jodi Perry**  
*Raymond James*

**Liz Weikes**  
*J.P. Morgan Wealth Management*

# Ambassador Community



WLA's Ambassador community of financial advisors, entrepreneurs, leaders, investors, educators and students continues to expand and empower women in the financial advising profession opportunities through advocacy, engagement, and collaborative thought-leadership.

Our members are 'Ambassadors' because of the role in which they advocate for change and take on leadership roles at various stages of their careers. As champions of the WLA mission, they represent the collective goal of empowering women in finance, with each individual playing a vital part in driving progress and fostering collaboration.

By becoming an ambassador, members not only benefit from the community's resources and support but also contribute to creating a more inclusive and dynamic financial advising profession.



**Ambassador Circles:** Create an environment where members collaborate in insightful discussions, foster connections, and ensure that every contribution, no matter the size, strengthens the influence on the industry.

**Regional Circles:** Provide local, grass-roots advocacy and support, working with the WLA in our mission to attract, develop, and advance women in the financial advising profession.

**Arizona**  
**Colorado**  
**Dallas**  
**Greater Midwest**  
**Oregon**

**Advocacy Circle:** Non-region-specific advocacy efforts focus on building industry influence through thought leadership, outreach to women students and mid-career changers, and provide development support to early-career women advisors.

**Early Career Advisor Circle:** The network of early-career women advisors and students engages in professional networking, campus outreach, and community-building while identifying development needs and expanding the reach of the Ambassador Community.

**Strategic Business Partner:** Partners in advancing a nationwide movement for positive change in the financial advising industry that pledge to engage in practices that support gender inclusion and equity within their business.

# Mentorships

8 years

216 participants

3500 hours

\$0 cost to Mentees

The WLA mentorship program pairs women in financial planning with experienced female advisors to foster professional growth through personalized, one-on-one guidance. Participants begin with structured training to establish a strong mentorship foundation, and, as part of the program, join the broader WLA mentorship community to enhance their networking opportunities and career development.



*“My mentor has been extremely instrumental not only to me professionally but personally.”*

*Helen Newsome, Mentee 2024*

# University Partnerships

Student sponsorships & internships provide support to help women on their education path to becoming a licensed financial planner. The WLA collaborates with universities to raise awareness of the financial advising profession among college women, offering valuable resources, opportunities, and support. To date, the WLA has invested over \$200,000 to provide student ambassadors with networking opportunities, tailored internships, and scholarship assistance, empowering the next generation of female professionals in the industry.

**2024 Scholarship Recipients from The University of North Florida and The University of Minnesota - Mankato**

Sydney Bridges

Matthew Roa

Mia Greenfield

Iyanu Saka

Rachel Skyle

Valerie Solis

Jade Flavin

Alyssa McCullough

Eunhye Kang

# Scholarship Spotlight



*“I’m extremely grateful for the opportunity to attend the CFP Board Connections conference in Washington, D.C. with the University of North Florida - Coggin College of Business. I broadened my knowledge of the profession [and] had the opportunity to meet and network with numerous industry experts.”*

At the Financial ConNEXTion Educational Conference & Cruise, Sydney Bridges represented the University of North Florida in the Career Exploration Competition, led by professor Ronald Heymann, and competed for the top spot in the competition finale.

# 2024 Donors

Bella & Chris Allaire  
Ellenore Baker  
Sharon Barton  
Anne Bedinger  
Kimberlee Bouska  
Paul Bennett  
Kalita Blessing  
Bill Carter  
Mary Carter  
Maria Daley  
Connie Deianni  
David Law  
Edythe De Marco  
Pamela Grey  
Jeannie Holliday  
Tom & Mary James  
Melissa Joy  
Teri Kelley  
Jack Kennedy  
Mikerson Laurent  
Judith McGee  
Tim McQueen  
Kathleen Miller  
Miran Milovanovic  
Kathy Muldoon  
Leo Nemanov  
Nina O'Neal  
Danielle Page  
Jodi Perez  
Julie Perez  
Kelly Petrocella  
Paul & Rose Reilly  
Colleen Schon  
Cathy Seeber  
Mark Smith  
Margaret Starner  
Sherri Stephens  
Carl Stuart  
Will Taylor  
Tom Walrond  
Laura Webb  
Yvonne Hall

# Thank you for your Support!

As a 501(c)(3) nonprofit organization, the WLA greatly appreciates the generosity of our donors and supporters, whose contributions are instrumental in advancing our mission.

## 2024 Corporate Sponsors:

Allianz Life Insurance Company | Eagle Asset Management | The Hive Catering Company | Merrill Lynch | Morgan Stanley | Natixis Investment Managers | Raymond James | Raymond James Investment Management | Signature Wealth

## Founding & Visionary Circle Donors

Bella Allaire | Tracy Alm | Ellenore Baker | Anne Bedinger | Paul Bennett | Kalita Blessing\* | Sarah Boston | Kimberlee Bouska\* | Scott Curtis | Bruce Cacho-Negrete | Vincent Campagnoli | Mary Carter\* | Shelly Church | Chris Butler | Linette Dobbins | Mary Durie | Tash Elwyn | Lynn Faust | Lynn Gaines-Phillips | Janice Henderson | Tom James | Lois James | Kim Jenson | Melissa Joy | Kate Kooman Starkey | Sally Law\* | Judith McGee\* | Kathleen Miller | Constance Miner | Kathy Muldoon\* | Danielle Page\* | Jodi Perry | Frances Pavloski | Paul Reilly | Traci Richmond | Judy Singleton | Colleen Schon | Alyssa & Todd Sanford | David Sisemore | Mark & Susanna Robinson | Mark Smith | Sue Spellman | Dawn Starks | Margaret Starner\* | Sherri Stephens\* | Carl Stuart | Jon Wax | Michael & Gina White | Laura Webb | Lara Yates | Lynn Wright | Scott & Melissa Weingarden | Dennis Zank

\*Legacy Founding Donors \$25,000+

## Empowering Circle Donors

Tori Boswell | Pamela Grey | Ilona Box | Tracy Belton | Jeanne Connolly | Mary Owens | Amber Seale

## Supporting & Sustaining Circle Donors

Sacha Millstone | Robert Bjork | Daniel Boyce | Caroline Holt | Tim Meek | Patrick Rooney | Brian Sweet | Melissa Dyer | Marcia Person | Crystal Alford Cooper | Ramzi Baklouti | Bill Carter | Karen Flynn | Timothy & Christina Killgoar | Kristie Kindstrom | Julie Perez | Jeannie Holliday | Lisa & Peter Walsh | John & Donna Walton

