

## **Minutes from the Meeting of the WLA Board of Directors DALLAS/HYBRID**

**January 28, 2026**

### **Dallas Attendees:**

Tracy Alm  
Kalita Blessing  
Mary Carter  
Heather Ettinger  
Margaret Starnier  
Laura Webb

### **Virtual Attendees:**

Ellenore Baker  
Lee Behensky  
Kimberlee Bouska  
Tracy Christiansen  
Stephanie Gularte  
Jessica Guo  
Teri Kelley  
Judith McGee  
Kathleen Miller  
Christine Mills  
Danielle Paige  
Sherri Stephens  
Nina Stubbs

### **Meeting Summary:**

The board meeting began with technical difficulties being resolved to allow for better audio connectivity among participants, followed by discussions about upcoming events and strategic planning. The group reviewed organizational updates including membership growth, new initiatives, and financial considerations, while also addressing the need for additional committee members and leadership transitions. The conversation ended with a focus on rebranding efforts, where the board discussed and voted on potential new names and taglines, with discussion around color schemes and logo design elements for rebrand.

### **Weather-Related Meeting Setup Challenges**

The meeting participants discussed travel difficulties due to severe weather conditions, with several members unable to attend in person. Stephanie and Tracy coordinated with the team in Dallas, who were setting up in the Carter Financial boardroom, but faced

technical challenges with sound output. The group worked to resolve audio issues, with Laura and others attempting to configure speaker settings through various troubleshooting steps.

### **Board Meeting: Welcome and Strategic Planning and Updates**

Stephanie acknowledged the efforts of all attendees in overcoming challenges to join the meeting, expressing gratitude for their presence. The agenda was adjusted to focus on voting measures and strategic planning for the future, with a decision to reconvene the following day for more in-depth discussions. Heather introduced herself as the newest board member, sharing her background in wealth management and consulting. The group discussed upcoming events, including a pre-conference mini-conference in Denver titled "Fearless Women: Bolder Together with WLA" and plans for future in-person meetings in Chicago and Boston.

### **Event Date Changes and Speaker Updates**

The group discussed two main events: a Denver event featuring Cari Carbonaro as keynote speaker on "Fearless With Purpose, Women, Wealth, and the Power to Transform an Industry," and a proposed date change for the Chicago event to June 22-23. The Chicago dates were chosen provide more planning time and too coordinate with the timing of QUAD A's Women's Conference in Chicago on June 25. While some board members expressed scheduling challenges for June due to summer vacations and school schedules, the group agreed to proceed with the June dates, with the understanding that some members might participate remotely.

The board discussed rescheduling an in-person meeting from the week of the 28th to the week of the 21st in Boston, which was agreed upon after confirming no attendees would be affected by the change.

### **Programming Updates**

Tracy presented programming updates, highlighting that the WLA Mentorship Program's 9th cohort began in January with 34 advisors, and the organization now has over 400 members across 46 states, including 65-70 students and early career advisors. Tracy also announced new initiatives including a confidential coaching program, regional circles, and the upcoming Future Financial Advisor Circle, which will launch in Q2 with a four-part webinar series.

The board discussed the importance of community and connections for members. Stephanie announced plans to focus on strategic goals and KPIs, with input from the board

to establish three key goals for the year. Kalita suggested highlighting success stories from mentor-mentee relationships at future board meetings.

### **Governance Updates**

The board approved Sheena Gray, CEO of QUAD A to the advisory council. Stephanie provided updates on board committees, highlighting the need for an additional member on the Governance Committee, particularly for board recruitment and succession planning. Sherri Stephens confirming she would continue as chair but seek a successor. Lee is leading the Advancement Committee partnering with a board member committee chair.

### **Financial Updates and Fundraising Strategies**

Lee reported on the organization's financial position, noting three accounts at Raymond James with a total value of 1.3M, while Jessica raised concerns about a projected \$84,000 deficit between income and expenses. Kimberlee explained this was a deliberate decision to invest in growth and expansion during a period of organizational development, with Laura adding that multiple small-dollar requests were in progress to build relationships and secure funding. Stephanie reiterated the need to invest in capacity growth at this time. Judith explained that while there is a potential for negative cash flow in the short term, the organization has a strong commitment from founders to raise significant funds for capacity growth over three years.

Lee presented a year-end fundraising report, highlighting the success of the annual campaign. Stephanie discussed the disparity in individual donors from 2024-25 and the need to diversify revenue sources. The board discussed personal thank yous and outreach in addition to staff efforts, to keep donors engaged each year.

### **Rebranding Decisions and Voting Process**

The meeting focused on finalizing decisions for the organization's rebranding efforts. Stephanie outlined the agenda, emphasizing the importance of voting on the new name and tagline. The group discussed logistical details for the next day's meeting, including start and end times. Stephanie explained the process for reviewing and voting on logo options, with the board set to receive two final logos for a virtual vote in about a week. The team also briefly touched on their positive experience with the Westin Galleria hotel during their recent stay.

### **Wealth Manager vs Financial Advisor**

The group discussed changing their organization's name from Women's Leadership in Asset Management to something incorporating "Financial Advisor" or "Wealth Manager." Jessica and Heather suggested that "Wealth Manager" better reflects the industry's

evolution toward managing clients' entire lives rather than just their finances, while others noted that "Financial Advisor" might be more inclusive and less intimidating for potential new clients. The group agreed that while "Wealth Manager" might be more forward-thinking, they should consider the organization's mission of attracting new advisors when making their final decision

### **Women's Alliance Name Decision**

The group discussed and voted on two options for the organization's new name: "Women's Alliance of Financial Advisors" (Option 1) and "Women's Financial Advisor Alliance" (Option 2). Option 1 was preferred by a majority of members, including several who noted its better flow and memorability.

The group also reviewed two tagline options, with "Advancing Women, Elevating an Industry" being initially favored but generating some debate about whether to use "profession" instead of "industry." An alternative "Elevating Women, Advancing an Industry" was also suggested. The discussion concluded with an agreement to narrow down the tagline options before taking a final vote, with Margaret emphasizing the importance of positioning advising as a profession to help change public perception.

### **Women's Alliance Logo Design Discussion**

The discussion then shifted to color, font, and graphic elements for the logo, with Stephanie explaining that the marketing firm had recommended looking at grayscale versions to independently choose these elements. The group expressed a desire for a warmer, more energetic logo design, moving away from the current cold and corporate appearance. The board discussed color options for their rebranding, ultimately deciding they preferred to maintain their current blue color scheme while making it bolder and more vibrant. They agreed to have the marketing firm present two final logo options for a majority vote.

### **Day Two Review**

Stephanie provided an overview on the second day's meetings with the Advisory Council members joining from 9-11am to hear Hannah's presentation and strategic discussion, with a separate meeting to be scheduled for Maria and Laura. The board will continue to meet from 11am-1pm to discuss future program strategy.

### **Executive Session**

Lee and Tracy were dismissed. Stephanie answered questions from the board about new staff roles. Stephanie was dismissed for a board member executive session.

Actions from meeting:

### **Next steps**

- Tracy: Update and send calendar invites with new 2026 meeting dates (June 22-23 for Chicago, week of 21st for Boston) to all board members
- Lee: Register domain names for new organization name options
- Tracy: Send event information to Kalita to distribute to leadership at Mercer Advisors in Denver
- Governance: Reach out to Sheena Gray inviting her to the Advisory Council.
- Board Members: Reach out to Stephanie with Committee interest.
- Advisory Council Members: Join tomorrow's meeting from 9-11 AM Central for Hannah's presentation and initial strategy discussion
- Maria/Laura: Schedule separate follow-up meeting with Advisory Council members
- Board Members: Participate in tomorrow's 11AM-1PM Central meeting for strategic planning and goal setting
- Stephanie: Present name change decision to Advisory Council during tomorrow's meeting
- Marketing Firm: Create new logo iterations incorporating current blues with bolder/fresher accents based on board feedback
- Stephanie: Bring back two logo choices to board for final selection, incorporating feedback