

**Minutes: WLA Dallas/Hybrid Meeting - BOD, Emerita Boards, Advisory Council
January 29, 2026**

Dallas Attendees:

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

Virtual Attendees:

Ellenore Baker
Lee Behensky
Kimberlee Bouska
Cary Carbonaro
Tracy Christiansen
Maria Daley
Stephanie Gularte
Jessica Guo
Teri Kelley
Tricia Kasner
Judith McGee
Kathleen Miller
Christine Mills
Danielle Paige
Geri Pell
Jodi Perry
Sherri Stephens
Nina Stubbs

Meeting Summary

The Women's Alliance of Financial Advisors (WLA) held a strategic planning meeting to discuss their rebranding efforts and future initiatives. Stephanie presented data on current membership and outlined plans for a new "Future Financial Advisors" program aimed at attracting and retaining women in the profession. The organization is expanding its regional circles to focus on specific markets like Boston, Chicago, and D.C., and developing leadership teams within these circles. Hannah Moore shared research from her externship program on women entering financial planning, which aligned with the WLA's mission and suggested potential collaboration opportunities. The meeting also covered upcoming events, including a conference in Boulder and board meetings in various cities. The organization is working to build capacity and launch a fundraising campaign to support these initiatives.

Data Presentation & Discussion

The meeting focused on the challenges and opportunities for attracting and retaining women in the financial advising profession. Hannah Moore presented research from the Amplified Planning externship program, highlighting that 43% of externs were women and discussing their motivations, barriers to entry, and desired work environments. The group discussed potential partnerships between the externship program and the WLA to provide mentorship and community support for women entering the field. The conversation ended with a brief overview of the WLA's strategic direction and plans for future collaboration with other organizations in the financial planning space.

WAFAs Rebranding and Growth Update

Stephanie announced that the organization is rebranding to Women's Alliance of Financial Advisors (WAFAs) with a new logo and color modifications, while maintaining its core mission. She highlighted the organization's growth, including 405 ambassadors with an 88.5% retention rate, and discussed upcoming events including a *Fearless Women: Bolder Together* conference in Denver on February 18 and future meetings in Chicago (June) and Boston (September) in 2026. The organization is investing in capacity building with a deficit budget to support future growth.

Ambassador Community and Future Initiatives

Stephanie discussed the evolution and future plans of their ambassador community, including refining the eco-system in which members receive value and regional circles engage in outreach to potential future financial advising women. The model includes a fundraising strategy in which WLA in-person events and member webinars are sponsored, and Ambassador Community outreach to future advisors is funded through industry partnerships. She highlighted the importance of regional circles, emphasizing the need for regional market-specific engagement and leadership within these circles, with plans to launch three new circles in 2026.

Stephanie introduced a new Future Financial Advising Program, which aims to attract and support students and career changers and will have a phased rollout which will include a future Advisory Circle, informational webinars for students and career changes, a “big sister” program, campus outreach and presentations, internships, and scholarships. She highlighted partnerships that are developing with CFP, Rock the Street Wall Street, QUAD-A, Savvy Ladies, and The Externship to coordinate outreach efforts and share resources.

2026 Strategic Goals and Targets

Stephanie outlined the organization's goals for 2026, including growing their Ambassador Membership to 650 members, launching the Future Financial Advising Women's Program, and identifying impactful membership experiences. Lee presented marketing and fundraising goals, emphasizing the need for a rebrand campaign and a long-term capacity-

building campaign. The organization aims to implement new systems and processes to improve operational efficiencies and prepare for a successful 2026 audit. Key performance indicators were shared, including membership targets, regional circle expansion, and webinar participation goals.

Stephanie outlined ambitious goals for the organization, including increasing webinar attendance, expanding regional events, and growing the number of future advisors engaged. She emphasized the need for sponsorships and funding, as well as plans for consistent fundraising. The group discussed the importance of upgrading systems and creating scalable partnerships. Council members expressed excitement about the organization's growth and momentum, while board members prepared for further discussions.

Council members were thanked and dismissed at 1:05pm CT.

The Meeting resumed with Board, Emeritae, and Team Members at 1:15pm CT

Membership Structure and Growth Strategies

The board discussed membership structure changes, including the introduction of team memberships for organizations with 3-4 women advisors. Stephanie presented plans to charge for non-member webinar access and pursue CE credits, while the team size membership concept received mixed feedback with some board members questioning its viability given typical team sizes. The discussion also covered the organization's strategic focus on expanding and engaging the ambassador community through individual and team membership growth, regional circles, and business partnerships, with plans to establish three board-level goals later in the year.

The group discussed strategies for membership pricing and packaging, with Heather suggesting that team sizes rather than AUM should be the basis for membership tiers, particularly for RIAs with 15-20 employees. Stephanie explained that the goal is to create off-the-shelf membership models that can be easily sold to decision-makers, with the aim of increasing individual member counts. The discussion concluded with Judith suggesting an email poll to gather more member input on the proposed membership structure, while Stephanie emphasized the importance of maintaining focus on mission-aligned activities and measuring impact.

Optimizing Team Communication and Efficiency

Stephanie discussed optimizing team efficiency and reducing email overload by clarifying roles, minimizing unnecessary CCs, and designating Wednesdays as heads-down days for strategic thinking. She highlighted the need to be more strategic and disciplined in vetting leads and guiding relationships, with input from Nina and Laura on involving board members in the initial stages of contact. Stephanie also emphasized the importance of using the board portal for information and reducing communication overload by ensuring that key updates are read and utilized.

Mission Alignment and Growth Strategies

The board discussed programming challenges, focusing on aligning mission goals with measurable impact. They emphasized the importance of membership growth through effective regional circle leadership and engagement. The possibility of rebranding the term “ambassador” to reduce perceived commitment required for membership. The group discussed potential new programs for regional circles, including scholarships and mentorship initiatives. They also addressed the need to improve technology systems and optimize relationships with current supporters. The conversation ended with plans for breakout sessions to set board goals, focusing on actions the board could take rather than tasks for staff.

Breakouts: Board Growth and Sponsorship Initiatives

The board discussed three main goals in three breakout groups and shared back with the entire group. The ideas presented included considering a successor for Stephanie sooner than later, increasing membership to 650 through both organic growth and board focused efforts, and securing 10 new event sponsors at \$2,500-5,000 each. The board agreed to aim for 100 new board member recruits, with the board committing to bring in 10 new members each. The board also discussed the need to improve messaging and branding, with plans to send out a "five things" email summarizing key takeaways and clarify communication channels between board members and leadership.

Stephanie agreed to refine the board’s goals and recommend 3 for the board to focus on in 2026.

Actions:

- Laura and Maria: Work with Advisory Council members to build on topics discussed at today's meeting and set individual commitments in three areas (industry advocacy, event/media participation, and ambassador event participation).
- Stephanie: Send the proposed CEO succession timeline to the board for reference.
- Stephanie/Lee: Develop a specific board-focused goal related to PR, marketing, branding, and messaging, including relevant metrics, and communicate this to the board.
- Stephanie/Lee: Send out a "5 things" email next week summarizing key takeaways and actions from the meeting.
- Stephanie/Lee: Send out clarity around when board members should reach out to Lee versus Stephanie for various types of requests.
- Board members: Commit to bringing in 100 new members collectively this year (tracking method to be determined).
- Board members: Commit to securing 10 new business sponsors for webinars and commuting conversations (at \$2,500–\$5,000 each).
- Stephanie/Tracy/Lee: Share specific event sponsorship details/dates.

- Laura: Reach out to Jenny Johnson at Franklin Templeton (individual action from Dallas group).
- Heather and Laura: Work on an initiative for Invest in Women now that the Chicago board meeting has moved.
- Laura: Target the president of Core Bridge Financial (Terry Fiedler) for involvement/voice.
- Board: Send personal thank you notes to individual donors (in addition to organizational acknowledgments).
- Board (or relevant subcommittee): Begin gathering ideas/requirements for future CEO/Executive Director role, focusing on industry background and skill set, in preparation for eventual search.
- Laura: Consider inviting Hannah Moore to join the Advisory Council.
- Board: Use the board portal and systems as they are rolled out, and provide feedback to staff on usability.
- Tracy/Lee/Stephanie: Reference the board portal link in all board communications
- Board (optional/follow-up): Anyone interested in researching appropriate team membership levels for smaller offices/RIAs to send feedback to Stephanie after further consideration.

Board (optional/follow-up): Anyone with thoughts on membership messaging, especially around reducing the perceived commitment of "ambassador" status, to share ideas with Nina and Terry for potential subcommittee work.