

Prospering Together

Advancing Women, Elevating an Industry



Women's Leadership
Alliance
for Financial Advisors

20% higher

client satisfaction when working with
female advisors

26% increase

in profitability among firms with
diverse teams

The Business Case for Closing the Gender Gap in Financial Advising

Despite marked improvements in gender representation in other traditionally male-dominated professions, the financial advising profession has remained relatively stagnant over the past two decades. Nonetheless, women in this field demonstrate remarkable performance and innovation.

Data from Fidelity Investments reveals that female advisors achieve client satisfaction scores that are 20% higher than their male counterparts.

Firms with diverse teams see a 26% increase in profitability, according to McKinsey.

Women are already proving their competence in finance. A report from the Certified Financial Planner™ Board indicates that women in financial planning have a higher average client retention rate and attract a more diverse clientele than their male counterparts.

This data makes it clear: attracting and retaining more women in financial advising isn't just beneficial—it's *essential for the success and health of the industry*

Higher Client Satisfaction

Trust

Shared Experiences

Stronger Relationships

The Power of Women Advising Women

Research has consistently demonstrated that women prefer to work with female financial advisors. A study from the American Psychological Association highlighted that women who work with female advisors report higher levels of satisfaction and trust. The reasons are clear: shared experiences and understanding often lead to stronger relationships and more effective financial planning.

With the impending wealth transfer, it is crucial that women have the option to choose advisors who can relate to their unique financial experiences and objectives.



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.

The Women's Leadership is a non-profit, 501(c)3, firm neutral organization





Our Story

The WLA was founded in 2017 by a group of long-standing, successful financial advising women who shared a frustration and a passion:

Why had there been so little change in the representation of women in the financial advising profession over the past two decades, despite advances in gender representation in other, historically male-dominated professions?

This question and their passion to effect change led to the formation of the Women's Leadership Alliance, a nonprofit 501(c)3 organization exclusively committed to addressing the persistent lagging representation of women in financial advising through firm-agnostic thought-leadership and through programs focused on raising awareness of the financial advising profession among women, providing early career development of women advisors and students, and supporting female advancement and succession in financial advising.

WLA Programs

Nationwide Ambassador Community

Providing professional development and community experiences to build retention and success among women advisors.

Woman-to-Woman Advisor Mentorship

A facilitated mentorship program focused on early career advisor's professional goals.

Future Financial Advising Women Program

Outreach and education about the financial advising profession to girls and women including a community of support, scholarships, internships, and individual career-mapping.



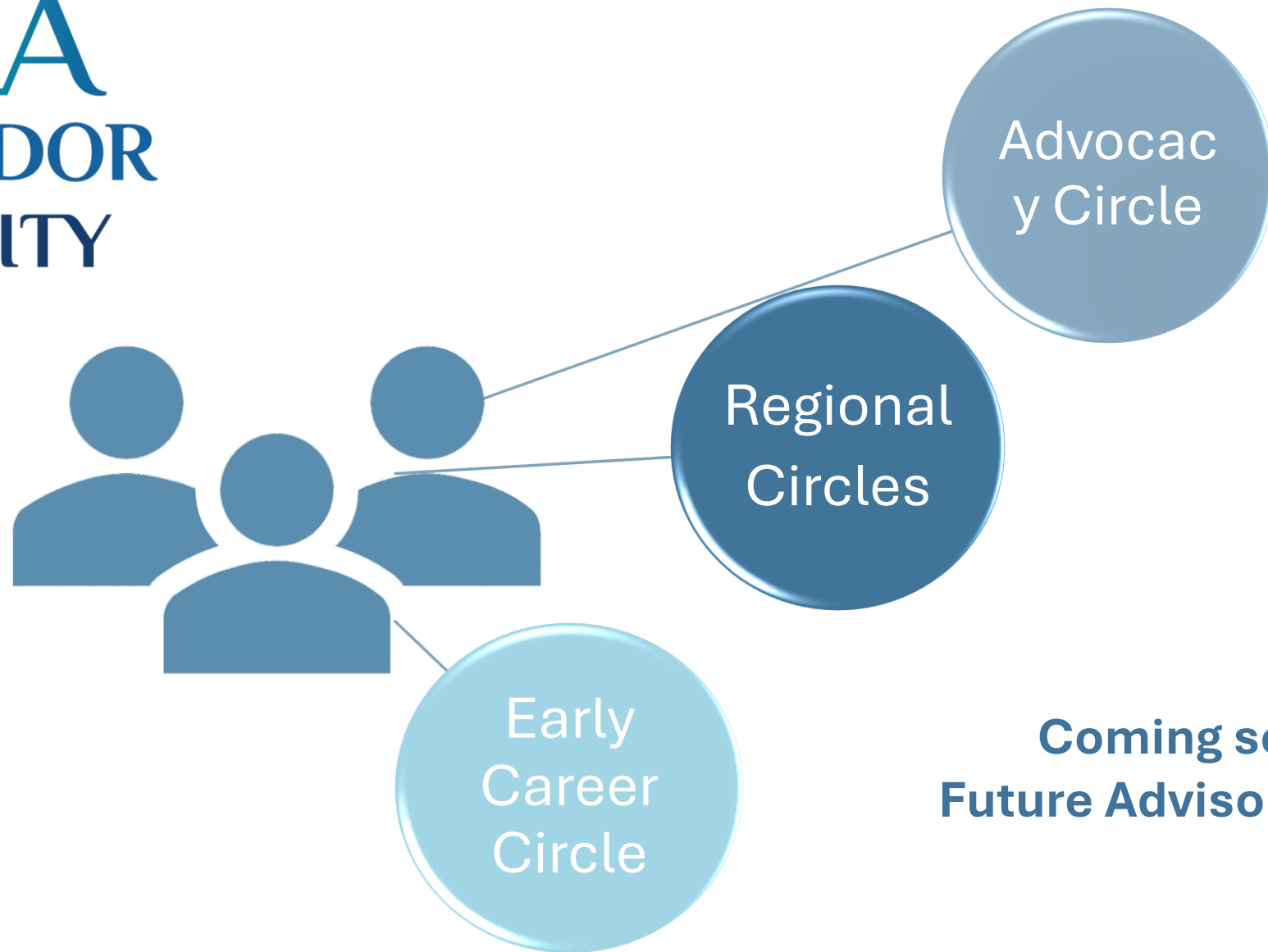
WLA
AMBASSADOR
COMMUNITY

A nationwide community of advisors, industry leaders, and allies, uniting to connect, empower, and advance more women in the financial advising profession.





WLA
AMBASSADOR
COMMUNITY



Coming soon:
Future Advisors Circle

Ambassador Community Regional Circles

Arizona
Florida
Greater Dallas
Greater Midwest
Oregon
Rocky Mountains
Tri-State (NY/NJ/CT)
Southeast

Coming in 2026:
Greater Boston
Chicago
D.C./Baltimore



 **WLA**
AMBASSADOR
COMMUNITY

The WLA is uniquely positioned to drive change...

Women Founded & Led: Founded by trailblazing financial advising women who understand how empowering this career path can be, the WLA is a nonprofit, 501(c)3 organization *exclusively* dedicated to advancing more women in the financial advising profession.

Forward-Thinking Thought-Leadership: Our firm-neutral mission and programs ensure that we are not hindered by corporate competition, or entrenched policies.

Collaboration is Key: The WLA's leadership includes women advisors and industry leaders from major industry wire houses and RIAs, providing a collaborative approach to creating change.

Mission-Focused: Our team is passionate about elevating the role of women in wealth management.

Woman-to-Woman Outreach: We design grass-roots and national opportunities to introduce the profession of financial advising to high school and college students and career changing-women.

Solution Focused: The WLA is dedicated to solutions that empower women and elevate the wealth management industry.



Event Sponsorships

In-Person Community Conversations

Onsite, community-building events with 50-70 advisors from across firms in attendance

Inspire Sponsor - \$5000

- Opportunity for a company representative to deliver a welcome address.
 - Branding opportunities at the venue including table and signage.
 - Company recognition during WLA event presentation
 - Recognition in all event-related communications and materials.
 - Two dedicated social media posts (pre- and post-event).
-

Advisor Insights Webinars

Virtual webinars providing professional and personal development and support for financial advising women at every stage of her career.

Catalyst Sponsor-\$2500

- Recognition in all event-related communications and materials.
- Company recognition on LinkedIn
- Company recognition during WLA event presentation
- Invitation to deliver welcome address at webinar.

Strategic Business Partnership Levels

A Customized Partnership for Advisor Recruitment, Development and Retention Needs

\$5,000/Annual Partnership

What's included:

- 40 Individual Ambassador Memberships for Qualifying Advisors.
- 50% Membership Discount for additional company staff.
- Your company's job and internship openings promoted on WLA job board.
- Sponsorship/Branding on WLA Website and in Ambassador marketing messages.
- Co-speaking opportunities at events.
- Webinar Series Panelist from Your Company.

\$7,500/Annual Partnership

What's included:

- 75 Individual Ambassador Memberships for Qualifying Advisors.
- 50% Membership Discount for additional company staff.
- Your company's job and internship openings promoted on WLA job board.
- Sponsorship/Branding on WLA Website and in Ambassador marketing messages.
- Co-speaking opportunities at events.
- Webinar Series Panelist from Your Company.

\$10,000/Annual Partnership

What's included:

- 125 Individual Ambassador Memberships for Qualifying Advisors.
- 50% Membership Discount for additional company staff.
- Premiere branding placement within membership community.
- Your company's job and internship openings promoted on WLA job board.
- Sponsorship/Branding on WLA Website and in Ambassador marketing messages.
- Co-speaking opportunities at events.
- Webinar Series Panelist from Your Company.

Program Sponsorships

Mentorship Partner \$10,000/year

Support

- Branding in all Mentorship Program Promotions
- Sponsorship Branding of Early-Career Advisor Circle, including monthly webinars
- Recognition on WLA Social Media throughout the Mentorship Program
- Representative from your company featured on Webinar Panel
- Access to promote employment and internship opportunities to WLA Community

Future Financial Advising Women Program \$20,000/year

- Branding featured on WLA website and Social Media
- Branding at 10 Future Advisor Outreach Events
- Branding in Weekly Ambassador Community Digital Communications
- Company representative featured on WLA Ambassador Community Webinar Panel
- Access to promote employment and internship opportunities to WLA Community
- Speaking Opportunity as *Lead Sponsor* of Future Advisors Webinar Series



Together, we can create positive change that results in a more diverse, more inclusive wealth management industry that reflects the communities and clients we serve.

To learn more contact:
Stephanie@womensleadalliance.org

womensleadalliance.org