



WLA Regional Circle Partnerships

A Strategic Investment to Attract, Retain, and Advance
Women in Financial Advising



A Strategic Partnership with the Women's Leadership Alliance

In the competitive landscape of financial advising, the need for gender diversity is critical to fostering innovation, enhancing client relationships, and ensuring long-term firm success. The Women's Leadership Alliance (WLA) offers an invaluable opportunity for wealth management firms, asset managers, and industry partners to support the recruitment, retention, and advancement of women financial advisors through partnerships that emphasize tailored personal and professional growth for women at all stages of the financial advising career path.

We look forward to partnering with you in our mission to empower women and to create a wealth management industry that reflects the diverse clients it serves!

Progress together!

A handwritten signature in blue ink that reads "Stephanie Gularte".

Stephanie Gularte

Executive Director

Stephanie@womensleadalliance.org



Our Mission

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

Our Partnerships

The Women's Leadership Alliance is dedicated to being an essential resource within the wealth management industry, empowering our partners to attract, retain, and develop both current and future generations of women financial advisors.

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



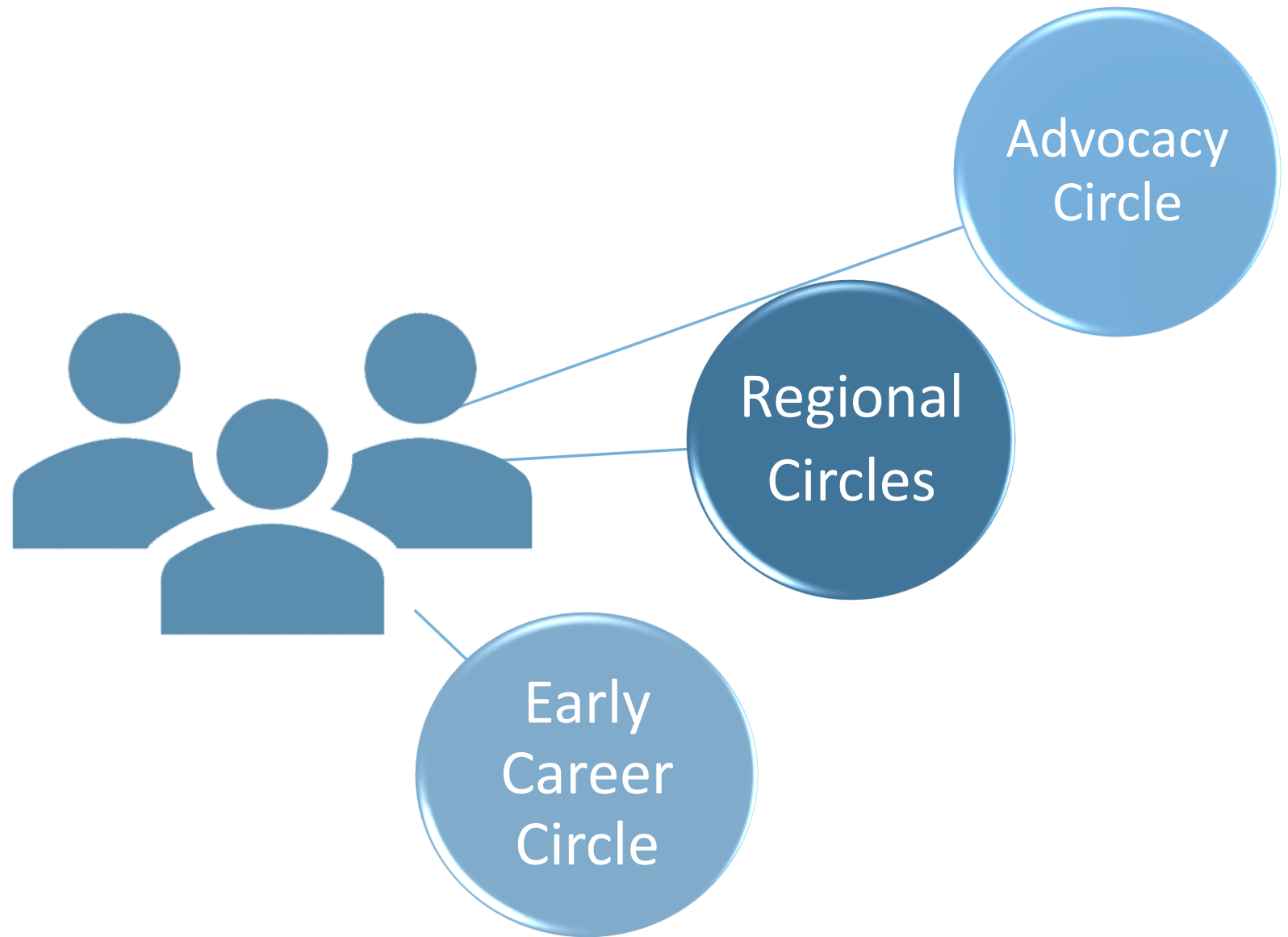


A nationwide community of advisors, industry leaders, and allies, uniting to connect, empower, and advance more women in the financial advising profession.





WLA
AMBASSADOR
COMMUNITY



Ambassador Community Regional Circles

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

Coming in 2026:

Chicago
Greater Boston
D.C./Baltimore



Regional Circles: Empower, Inspire, and Build

for Positive, Industry-Wide Change

1. EMPOWER

Empowering women in advising through tailored professional development and personalized support.

2. INSPIRE

Engaging in outreach and advocacy to inspire the next generation of women financial advisors.

3. BUILD

Growing our nationwide membership to expand our reach and scale our impact.



Ambassador Membership Benefits



- Membership access to an **empowering community** dedicated to advancing women at every stage of their advising career.
- Professional and personal development **webinars** and **resources** tailored to the needs and values of women advisors, helping them build sustainable success.
- Eligibility for WLA Woman to Woman **Mentorship Program**.
- Access to **confidential coaching** sessions to address complex challenges.
- Eligibility to join Regional and Affinity Ambassador Circles
- Exclusive invitations to WLA **events**, providing networking opportunities with peers and industry leaders.
- Members-only discounts via exclusive Ambassador **Marketplace**.

Annual Membership Dues: \$150

Early-Career: \$75

Students: Free



Regional Circle Partnership Opportunities

Partnering with forward-looking businesses to advance women in financial advising



Women's Leadership
Alliance
for Financial Advisors

Regional Circle Partnerships

Regional Ambassador Circle Partner

Support the year-round professional empowerment for women advisors and future advisors in the Boston region.

Leadership Partner - \$10,000 annual

- Inspire event sponsor benefits, plus:
 - Prominent , year-round logo placement on WLA Website
 - Feature on WLA Social Media Channels
 - Leadership Recognition and at Boston Regional Circle events
 - Recognition within digital marketing platforms of the nationwide WLA Ambassador Community.

Champion Partner -\$7,500 annual

- Catalyst event sponsor benefits, plus:
 - Year-round logo placement on the WLA Website
 - Feature on WLA Social Media Channels
 - Recognition at Boston Regional Circle events

Ambassador Regional Circle Event Sponsorships

Advisor Community & Conversation Event Sponsor

Onsite, community-building events with 50-70 advisors from a variety of firms in attendance

Inspire Sponsor - \$5000

- Opportunity for a company representative to deliver a brief 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).

Catalyst Sponsor -\$2500

- Branding opportunities at the venue, including banners and signage.
 - Recognition in all event-related communications and materials.
 - Company recognition during WLA event presentation.
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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.

Thank you for your support!

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womensleadalliance.org