



**Women's Alliance**  
*of* FINANCIAL ADVISORS

**Virtual Meeting of the  
Women's Alliance Board of Directors**

**April 21, 2026**

## AGENDA

- 4pm-4:10pm**      **Meeting called to order by Board Chair, Kimberlee Bouska**
- Review Agenda and Goals
  - Board Approval of Minutes from January 2026 Mtgs
- 4:10pm -4:15pm**      **Mission Moment & Program Highlights**
- Key Mission Highlights
- 4:15pm 4:25pm**      **Operations Updates**
- Annual Report, Name Change, Operational Strategy
- 4:25pm-4:30pm**      **Finance Committee Updates**
- Accounts Position
- 4:30pm-4:40pm**      **Chicago Agenda**
- Strategic Plan/Capacity Building Campaign/Founder Match
- 4:40-4:50pm**      **2027 In-person meetings: Board Vote**  
*Tracy & Lee Excused*
- 5:00-5:15pm**      **Presentation from CEO, Stephanie Gularte**
- Leadership Model presentation
- 5:15-5:45pm**      **Board Discussion**
- Advisory Council
  - Board of Directors
- 5:45pm**      **Executive Session**
- *Stephanie Excused*
  - Board Vote on Leadership Model
- 6pm**      **Meeting Adjourned**

# Mission Moment: FUTURE ADVISORS

**Future Advisors Webinar Panel on April 7 (featuring Christine, Kimberlee, Gyles, & Shelina)**

**135 Registrants; 65 Attendees; 20 NEW AMBASSADORS (Students & Career Changers)**

**Featured Attendee:** Linette Mejia, AFC®

**Discovered Women's Alliance:** On LinkedIn; Attended April 7 Future Advisor webinar

**Joined:** Inspired to join community right after the webinar

**Her Path:** Associate at The Dala Group in Chicago; currently working on her CFP

**Her Why:** Seeking mentorship and community as she transitions into an advisor role

**Her Engagement:** Joined early career advisor circle last week for monthly meeting

**Meet Her In-Person:** Reached out after seeing Chicago network event promotion & will attend on June 23 to meet members in person



# Mission Moment: MENTORSHIP

**“I always feel better coming out of a meeting with my mentor than when I headed in.”**

**-Mentee**

**“When I signed up what I thought I wanted was very nebulous. I am amazed at how the WLA made such a perfect match; my mentor understood me before I fully understood myself.”**

**-Mentee**

**“My mentor has brought so many fresh perspectives to my day to day and that’s so valuable to me as I’m in practice with all men.”**

**-Mentee**

**"My Mentee and I are doing great. I look forward to every call. She has aggressive goals and a lot on her plate. Being able to back board her ideas is valuable not only for her, but for me too.**

**We followed the outline provided by WLA and it has worked well.“**

**-New Mentor for the Women’s Alliance**

# Mission Moment: REGIONAL CIRCLES

## **Jessica and Nicole's story (Co-chairs, Phoenix Circle)**

*“I don't like crying and I really don't like crying in public but the recognition by Sarah Stander had me nearly breaking down. Sarah is a young woman who had served in the finance club at her school but was “iced out” by the boys in the club. So Sarah started the Women in Finance Club in 2024 to give women a place to thrive and support each other. When she spoke that night she talked about the inequality in representation in our field and how she and the other members are committed to changing that, not accepting it as the way things are. Younger women are watching us. We need to be brave and continue to do the work so that these women have role models and resources. What we do at WLA matters”*



<b>2026 Goals</b>	<b>To Date: April 21, 2026</b>
Membership: 650 total members	<b>470</b>
Member retention: 85% annually	<b>88.5%</b>
Regional circles: expand from 8 → 11 in 2026	<b>Chicago; Boston; Nashville, DC</b>
Circle Membership: 25+	<b>15 Average</b>
Webinars: 24/year; Average 25 attendees	<b>11 Webinars/20 Avg Attendance</b>
Future Advisor Outreach: 12 events/presentations	<b>5 events/presentations</b>
No. of Future Advisors Engaged: 300	<b>197</b>
Event & Webinar Sponsorships: \$25,000	<b>\$10,000</b> (First Trust, Invesco, Riverfront)
Sponsorships and Business Partner Funding: \$75,000	<b>\$36,250</b> (Morgan Stanley, Carson Group, Millenium Partners)
Individual Donations: \$215,000	<b>\$44,662</b>
Submit minimum of 4 grants	<b>Scheduled for Q2 &amp; Q3</b>

# Advancement

- Annual Report Shared digitally with 6125; printed copy mailed to 100
- Brand/Name Launch: April 28
- Partnership MOUs:
  - CFP Board (Completed)
  - The Externship (Completed)
  - QUAD A (In-process)
  - Equita (In-process)
- Carson Group Business Partnership
- RJ Sponsorship Mtg
- Hubspot!



# Operations

**Data & Impact:**  
Hubspot CRM  
(Automated)

**Finance:**  
QuickBooks Online  
(Integrated)



**Comms:**  
Native Hubspot  
Integration

## Phase 1 Technology Updates:

QBO – is fully integrated

*Budget & Financial Reports – are aligned and functioning*

*Weekly reconciliation of accounts receivable & accounts payable*

CRM HubSpot – completed integration items

*Client accounts*

*Historical giving & memberships*

*Stewardship notes*

*Cultivation tasks*



# Operations

## Phase 2 Technology

### Underway:

CRM HubSpot integration items

*Automation of donations from payment system, Stripe*

*Automation of donors/members to marketing system, Mailchimp*

*Dashboards*

*Custom reporting*



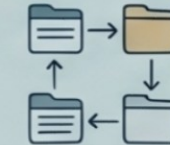
### Three-Phase Implementation Roadmap



Q1:  
Assess workflows



Q2:  
Align tools



Late Q2:  
Phased rollout  
and staff training



**BUILT FOR SCALE,  
NOT LABOR**



# Finance Committee

Current accounts position

Q1 P&L

DBA name change legal updates



## Financial Accounts Positions

	Account type	4.20.26
908209908	Chase Bank Checking Account	\$25,964
1052913400	Trust Short Term	\$65,802
1052913401	Trust Long-Term	\$1,091,740
1052913402	Board Directed Funds)	\$206,394
	<b>BALANCE</b>	<b>\$1,370,152</b>



# 2026 Events & Board Meetings

**June 22- 23: Chicago**  
Board Mtg & Community Event  
Strategic Plan  
Capacity Building Campaign

**Sept 22-23: Boston**  
Board Dinner, Mtg & Community Event  
Circle Launch  
Leadership Search  
2027 Budget

# Chicago Agenda & Itinerary

Strategic Plan/Capacity Building Campaign/Founder Match

**Monday, June 22, 12:30-4:30pm CST Board Mtg**

**Tuesday, June 23, 10am-3pm CST Board Mtg**

**Tuesday, June 23, 4:30pm-6pm CST**

**Community Event: LUXBAR**

**Sponsor: First Trust**

New Advisory Council member, Sheena Gray, will join us and speak briefly about QUAD-A.

\*Laura Webb will be joining a panel at the [WIIN Conference](#),”  
Legacy in Motion - Women Defining What’s Next” on June 25 in Chicago and Stephanie will be hosting a  
Women’s Alliance vendor table during the conference.

## **In-Person:**

Ellenore  
Kimberlee  
Laura  
Judith  
Heather  
Mary  
Sherri  
Stephanie  
Tracy

# Strategic Planning 2026-2028 Concepts

**Membership Strategy: Grow Membership & Increase Member Engagement**

**Outreach Strategy: Develop Future Women Advisors**

**Marketing & Event Strategy: Build Influence and Impact**

**Partnership Strategy: Build Mission-Aligned Industry Partnerships**

**Operations Strategy: Design a Sustainable Staffing Model**

**Funding Strategy: Secure Diversified Funding:**



**Proposed:  
2027 In-Person Board Meetings**

**Early-March 2027  
Washington DC**

**October 2027  
Palm Springs, CA  
(Fearless Women Event)**



# Discuss Leadership Models