

Prospering Together

Advancing Women, Elevating an Industry



Women's Alliance
of FINANCIAL ADVISORS

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



A non-profit, 501(c)3, firm-neutral organization

Our Mission

Committed to attracting, developing, and empowering women to build thriving and fulfilling financial advising careers.

Our Leadership

Founded and led by women advisors and wealth management leaders from across the industry, collaborating to drive effective, firm-neutral solutions that advance women and elevate the wealth management profession



Uniquely positioned to drive change...

Women Founded & Led: Founded by trailblazing financial advising professionals, the Women's Alliance is the only nonprofit, 501(c)3 organization *exclusively* dedicated to attracting and advancing more women in the financial advising profession.

Forward-Thinking Thought-Leadership: Our firm-neutral mission ensures that we are not hindered by corporate competition.

Collaboration is Key: Our leadership includes advisors and leaders from major wirehouses and reputable RIAs, working collaboratively to promote change.

Community Builds Retention: When women have access to a powerful community of support, they thrive, personally and professionally.

See One to Be One: Our grass-roots outreach connects women advisors to high school and college students and to career changing-women around the country,

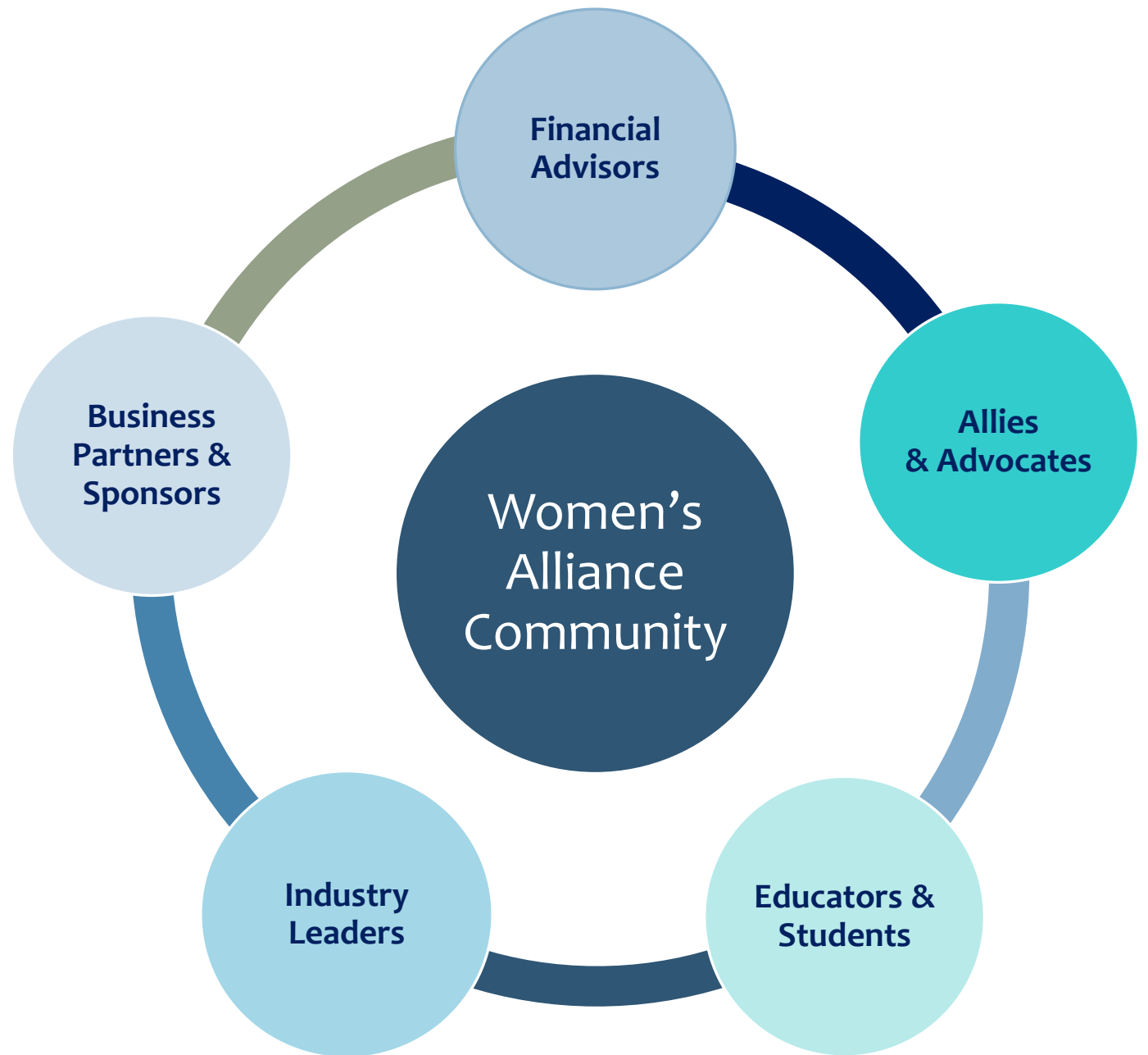
Solution Focused: The Women's Alliance openly recognizes challenges, while dedicating our efforts to positive solutions that empower women and elevate the wealth management industry.





Women's Alliance of FINANCIAL ADVISORS

Our community includes firms, industry leaders, and individual advisors united in our mission to attract, retain and advance more women in wealth management.





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Our Initiatives

Nationwide Ambassador Community: Membership with a Mission

Providing professional development events, resources, community-building, and thought leadership experiences to promote retention and success among advisors.

Woman-to-Woman Advisor Mentorship

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

Future Advisor Program

Education the financial advising profession and individualized support to girls and women including scholarships, internships, and career mapping.



Ambassador Membership

An empowering membership community where future and current advisors and industry allies gain access to support and resources to advance their personal and professional success and wellbeing at every stage of their career.





Membership Benefits

- ❖ An empowering community of support for advisors & future advisors
- ❖ Professional Development Webinars offering Ces.
- ❖ Wellness-themed webinars and events tailored to the values of women advisors.
- ❖ Woman-to-Woman Advisor Mentorship
- ❖ Confidential Coaching for support with specific challenges and complex issues.
- ❖ Regional and Affinity Ambassador Membership Circles
- ❖ Exclusive in-person events with peers and industry leaders.
- ❖ Members-only discounts in our Vendor Marketplace.

Membership Events Tailored to the Interests & Values Of Women Advisors

(Examples)

JANUARY 15 AI AND THE ADVISOR: REDEFINING CLIENT ENGAGEMENT Early Career Advisor Circle

JANUARY 20 HOW WOMEN REALLY THINK ABOUT MONEY – AND WHY IT MATTERS *with FA and industry leader, Cary Carbonaro*

FEBRUARY 9 THE INTELLIGENCE SHIFT: HOW AI IS RESHAPING THE ECONOMY AND THE ENVIRONMENT

FEBRUARY 11 NAVIGATING ROUGH WATERS AS CAREGIVER & CAREER WOMAN *With Theresa Wilbanks, author of Navigating the Caregiver River: A Journey to Sustainable Caregiving*

FEBRUARY 19 KEYS TO SUCCESS FOR THE MODERN FINANCIAL PROFESSIONAL *with Jackie Wilke*

MARCH 5 PREFERRALS: TRANSFORMING REFERRALS INTO RELATIONSHIP-DRIVEN GROWTH *with Collette Fidrych. A research-based, low-risk approach that helps financial professionals attract qualified new clients by replacing outdated referral tactics*

MARCH 17 WHAT SHE WANTS: HOW TO CONNECT, COMMUNICATE, AND CONVERT *with FA and industry leader Cary Carbonaro.*

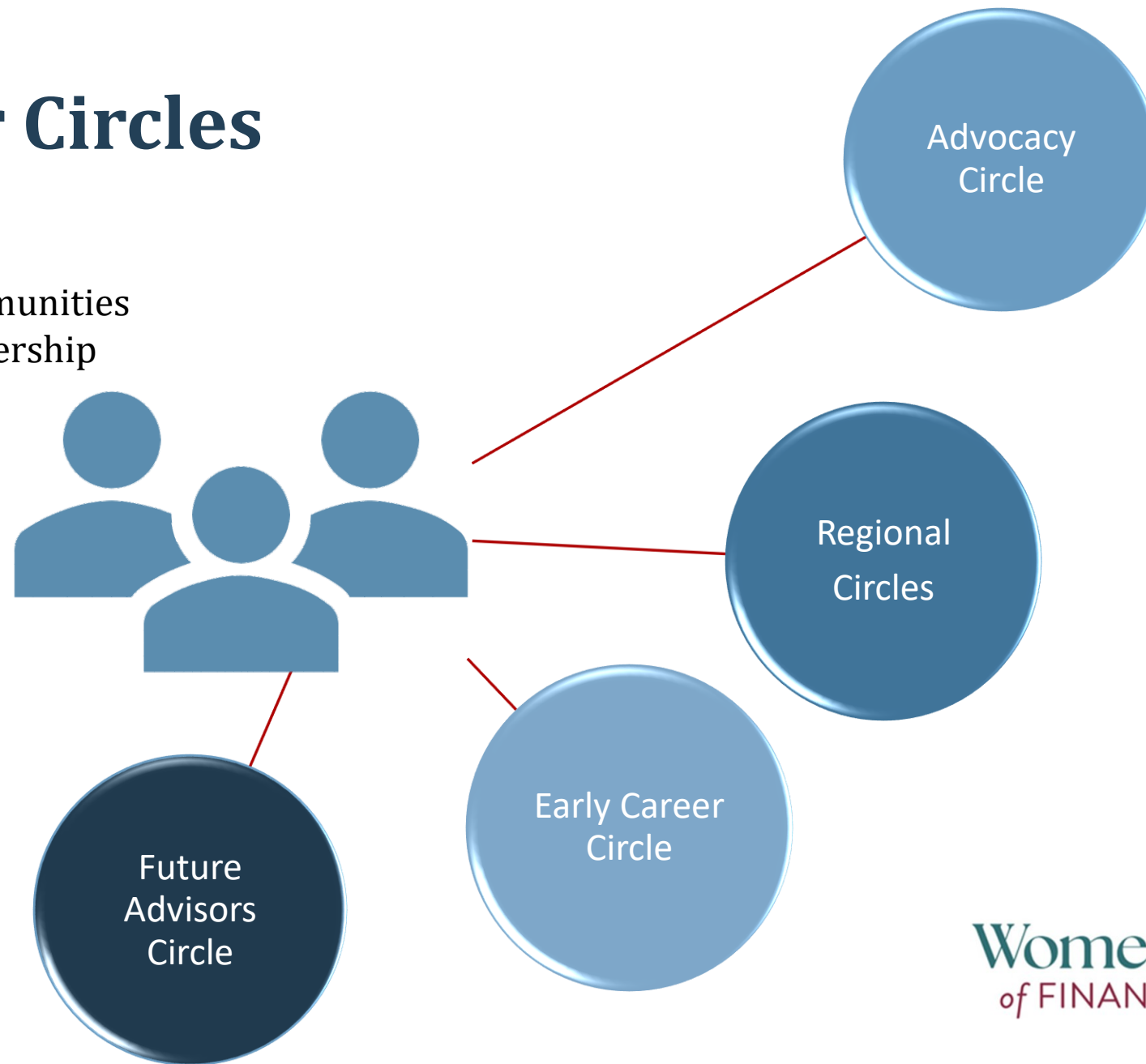
MARCH 19 HIDDEN DATA: A DEEP DIVE DISCUSSION ON INVISIBLE WOMEN: DATA BIAS IN A WORLD DESIGNED FOR MEN *by Caroline Criado Perez A facilitated book club conversation with Women's Alliance CEO.*

APRIL 7 FUTURE FINANCIAL ADVISING SERIES: Demystifying the career path exploring different FA career tracks

APRIL 9 LINKEDIN MASTERY: ADAPTING TO THE DIGITAL AGE *with Lia Bliss. Practical strategies to adapt, stand out, and thrive on LinkedIn.*

Ambassador Circles of Influence

Regional and Affinity communities within our national membership community



Regional Circles

Phoenix, Arizona
Florida (State-Wide)
Greater Dallas
Greater Midwest
Portland, Oregon
Rocky Mountains
Tri-State (NY/NJ/CT)
Southeast (Atlanta-Based)

Coming in 2026:

Greater Boston
Greater Nashville
D.C./Baltimore



Business Partnerships & Sponsorships



Customized Partnerships for your Advisor Recruitment, Development and Retention Needs

Example partnership benefits:

Talent Acquisition & Membership:

- Individual Memberships included for your qualifying advisors and future advisors with access to comprehensive benefits.
- 50% Membership Discount for additional company staff.
- Recruitment: Opportunity to promote openings in your firm via the Women's Alliance Opportunity Board,

Mission-Aligned Branding:

- Event Visibility: Branding featured at all on-site advisor events.
- Strong Digital Presence: Premier logo placement on the Women's Alliance website and across all social media platforms.
- Direct Marketing: Weekly brand visibility in *Ambassador Community* digital communications and marketing messages.

Thought Leadership & Speaking Opportunities:

- Webinar Sponsor and Presenter: Lead Sponsor and presenter or panelist for an WLA Advisor Insights Webinar
- Live Event Sponsorship Recognition/Speaking Opportunity Annual speaking opportunity for leader from your firm.



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Together, we can create positive change that results a future-ready wealth management industry responsive to the diverse needs of the clients we serve.

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