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## A MESSAGE FROM THE BOARD

To our WIIN Community,

We hope this message finds you well and enjoying your summer. At WIIN, we remain dedicated to our mission of strengthening relationships and facilitating a dialogue that advances and empowers women in the Southern California institutional investment community.

We kicked off 2023 with two thought provoking events that focused on career development. In January, we explored the Why and How of Executive Coaching, providing valuable insights into the power of coaching in professional development. In March, we launched WIIN's Mentorship Program with an informational breakfast on optimizing mentor relationships. In April, WIIN's Philanthropy Committee partnered with Junior Achievement for an event focused on financial literacy. We extend our gratitude to all the volunteers who shared their time and expertise to educate and inspire the group of 50 students from Carson High School. In June, we hosted the Private Markets Mid-Year Pulse, our first formal event in Orange County, which attracted a mix of members from LA, OC and San Diego.

As we move forward into the second half of the year, we have an exciting lineup of events scheduled. Please mark your calendars for WIIN's Annual Luncheon on Thursday, October 12<sup>th</sup>. We are thrilled to welcome Mara Liasson, esteemed journalist and political analyst, to discuss the cross section of politics, legislation and the financial markets.

As we mentioned in our last message from the Board, WIIN is committed to our DEI initiatives, striving to ensure WIIN is providing an inclusive, safe and relevant environment that amplifies women's experiences and promotes competence with a "pay-it-forward" collective mentality. An update from our Diversity Committee is included below.

Finally, we are delighted to announce changes to WIIN's Advisory Council. June Kim (CalSTRS) and Poorvi Parekh (Canterbury Consulting) will join WIIN past president Lara Clarke (The Carlyle Group), Kristin O'Connor (The Ahmanson Foundation) and Machel Allen (Metis Global Partners) as strategic advisors to the Board. We thank outgoing Council members Eileen Neill, Lisa Mazzocco, and Martha Spano for their guidance on the Advisory Council over the last several years.

As always, we extend our gratitude to our members, volunteers and sponsors who continue to support WIIN and contribute so critically to both the caliber of our events and the power of our community.

With gratitude,

**The WIIN Board**

## ORGANIZATIONAL UPDATES

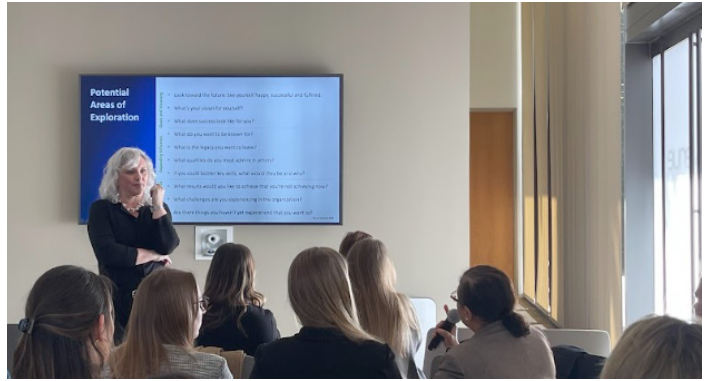
A friendly reminder, our new address is **1920 Hillhurst Avenue, #1243, Los Angeles, CA 90027**, and you can reach us by telephone at **(424) 688-5510**. Our contact email remains unchanged, [info@wiin.org](mailto:info@wiin.org). Please share our updated contact information with you accounts payable and other relevant parties within your organizations.

## MEMBERSHIP PRICING UPDATE

As mentioned in our Winter Newsletter, effective July 1, 2023, WIIN has increased the cost of the annual individual membership from \$125 to \$140. WIIN has maintained its membership price at the same level since the inception of the organization in 2014. We raised the price to help offset increasing costs and allow us to deliver the same quality programming as we have in the past. Reduced cost memberships for students remain unchanged (please see additional info in the Philanthropy update below).

## WIIN MENTORSHIP

We officially launched our inaugural WIIN Mentorship Program earlier this year with over 65 of our members participating as either a mentor or mentee. On March 24, Lisa Lai of Lai Ventures ([www.laiventures.com](http://www.laiventures.com)) helped us kick off the program with an exploration of the importance of the role of the mentor and mentee and how to get the most out of these relationships. She shared best practices and her tips for building a successful framework for not only establishing rapport but also measuring success. The event was a resounding success and for those that missed it, we have provided a few highlights and key takeaways from the conversation. If you would like to learn more, please visit our website ([www.wiin.org/Mentorship](http://www.wiin.org/Mentorship)) to hear the replay.



## TOP 10 TAKEAWAYS FROM LISA LAI'S MENTOR/MENTEE EVENT:

1. Mentorship is a reciprocal relationship between two people where one person is in a position to help unlock the highest potential of the other.
2. The mentor's role is to serve as a catalyst—connect with ease, ask questions, be generous with time, make the uncomfortable more comfortable and be accountable for results.
3. The mentee's role is to commit and evolve—be aspirational, hungry for knowledge, candid and open, receptive to input and accountable for results.
4. The structure of these engagements matters—agree upfront on what works best for both people.
5. Building trust and rapport takes time, the benefit of these relationships unfolds gradually as you go. Be patient.
6. For both mentors and mentees, it's important to show up to these meetings prepared.
7. Mentees take the lead by sharing aspirations, goals and focus areas—be thoughtful about what you want to accomplish.
8. Mentors listen, inquire and provide guidance. It's important to find the right balance between inquiring vs sharing and between supporting vs challenging.
9. It's important to reflect on how it's going, measure progress, hold yourselves accountable for the desired results. Talk about this actively and tweak the engagement as you go.
10. Don't forget, mentors can learn from mentees too—it's truly a two-way relationship.

We would like to thank all of our mentors and mentees who are actively engaged in the program this year, and we also want to thank those who have already expressed interest in joining next year's cohort. We will be sending a survey out this fall to this year's participants to gain input, feedback and ideas on the program and we will solicit interest in 2024's program in December. In the meantime, if you have any comments, input or questions about the program, please reach out to [info@wiin.org](mailto:info@wiin.org).



## WIIIN DIVERSITY

As noted in our opening message, WIIIN's focus for 2023 has been to infuse DEI best practices into all facets of the organization. Below are some noteworthy developments:

### DEI TRAINING AND EDUCATION SESSIONS:

In January, the WIIIN Board participated in an Inclusive Leadership training session led by Johnson Squared Consulting. Further, in line with our mission of education and empowerment, in August we look forward to our virtual DEI training with Johnson Squared on neurodiversity in the workplace (please see event details below). We are excited to explore this evolving research with our members.

### COMMITMENT TO VENDOR DIVERSITY:

We have taken an intentional approach to working with women and/or diverse vendors for WIIIN-sponsored events.

### SERVING AS A CHAMPION OF DEI:

We aim to raise awareness and understanding via social media, whether by promoting heritage months, addressing events that reflect our members, and/or by amplifying voices. We will continue to look to refine and enhance our content as we implement our strategic initiatives.

We recognize that DEI efforts take time, and we appreciate you all being on this journey with us.

## WIIIN PROGRAMMING

### UPCOMING 2023 EVENTS

#### VIRTUAL DEI TRAINING WITH JOHNSON SQUARED ON NEURODIVERSITY IN THE WORKPLACE

On Thursday, August 10, from 4-5pm, WIIIN will host our second virtual DEI workshop with our DEI consultant, Johnson Squared, on Neurodiversity in the Workplace. Dr. Jade Singleton and Noelle Johnson will guide an intimate, members-only discussion on neuroinclusion and understanding the unique perspectives of all colleagues to help foster an environment where all individuals feel safe to bring their authentic selves to work. Please visit the event registration page for further info: <https://wiiin.org/event-5342082>

#### SUMMER HAPPY HOUR

Stay tuned for additional details on a summer happy hour scheduled for late August. We look forward to WIIIN's annual informal member-only gathering to network and enjoy refreshments.

#### 2023 ANNUAL LUNCHEON

On Thursday, October 12, WIIIN will host our Annual Luncheon at the Intercontinental Downtown LA. We are thrilled to

announce that Mara Liasson, national political correspondent for NPR, will be joining in a fascinating discussion of what to expect from the 2024 election, Washington's notorious gridlock of recent years, if and how we will be able to overcome these dynamics, and implications in the near and medium term for global dynamics. She will be joined by Geraldine Jimenez, Senior Investment Director of public markets for CalSTERS, who will address the impact of these geopolitical and geoeconomics concerns on our constituents' portfolios.

Every year at our luncheon we honor someone who has made a difference for women in our industry and who has demonstrated through word and deed, a dedication to uplifting women and helping them succeed. This year, we want to open the door for nominees from our membership. If there is a woman in our industry who has made a positive impact in your career, please feel free to email [info@wiiin.org](mailto:info@wiiin.org) so we may consider her for this year's award.

**Please keep your eye out for invites and save the dates!**

### 1H 2023 PROGRAMMING RECAP

#### THE WHY AND HOW OF EXECUTIVE COACHING

On January 26, WIIIN held our first event of the year, providing our membership with the opportunity to hear from Susan Lerner, Founder of Libra Coaching (<https://www.libracoachingllc.com/>). Susan discussed the benefits of working with an Executive Coach, particularly during times of career uncertainty, to navigate challenges and help maximize our professional potential.

#### PRIVATE MARKETS MID-YEAR PULSE



On June 15, WIIIN alongside platinum sponsor Canterbury Consulting was delighted to present the Private Markets Mid-Year Pulse. Given the outsized performance of private equity and the rise in interest rates, we provided a diverse slate of LP and GP perspectives on the denominator effect with regards to deal activity, allocation decisions, and fundraising. Moderated by WIIIN Advisory Council member, Poorvi Parekh (Canterbury), panelists Natasha Li (Ares Management), Valerie Ruddick (Pathway Capital), Stina Walander-Sarkin (Orange County



Employees Retirement System), and Natalie Walker (Stepstone Group) provided invaluable insight into current trends in private equity and private credit markets and shared details of their personal career progressions. Delving into macro trends, panelists also discussed the outlook for sponsored companies and implications for asset allocation shifts, particularly with respect to primary and secondary markets. Attendees enjoyed refreshments in Canterbury's offices immediately following the panel, providing a fantastic networking opportunity. We were especially grateful for the chance to hold our first flagship event in Orange County, and be able to engage with our broader Southern California community.

## WIIIN PHILANTHROPY

WIIIN continues to focus our philanthropy efforts on addressing issues that impact women in our local community.



### PHILANTHROPY EVENT: JUNIOR ACHIEVEMENT CAREER EMPOWER SUMMIT

On April 18, in support of April as Financial Literacy Month, WIIIN partnered with Junior Achievement SoCal on a Career Empowerment Summit, hosted by platinum sponsor DoubleLine. 50 students from Carson High School joined our group of volunteers for a thought-provoking panel discussion with Kerrisha Jenkins (PIMCO), Janeane O'Dell (Broadshore Capital Partners) and Ryan Russell (DoubleLine), moderated by WIIIN Sponsorship Co-Chair Chelsea Carbonel (Ares). Panelists shared their journeys to success, setbacks, and lessons learned. Students were exposed to different career paths and WIIIN members provided feedback and career tips during breakout sessions. We are thrilled to continue our impactful partnership with JA SoCal and look forward to working with the organization in the future.

JA SoCal is a non-profit organization focused on teaming local businesses with underserved high schools, and delivering experiential learning programs for financial literacy, work readiness and entrepreneurship <https://jasocal.org/>.

### FALL PACKING PARTY

In November, the WIIIN Philanthropy Committee will host our Annual Packing Party, a community building activity to assemble shower and personal hygiene kits for homeless women served by one of LA's largest female-focused charities, Downtown Women's Center. Last year's packing party was an amazing event, and we look forward to gathering for an important cause to give back during the holidays again this year.

DWC is the only organization in LA focused exclusively on empowering women experiencing, or transitioning from, homelessness. We've invited members of the DWC team to join our event and provide volunteers with greater context into the work they do every day to aid homeless women in our community. <https://downtownwomenscenter.org>.

### STUDENT MEMBERSHIPS

WIIIN offers fully sponsored one-year memberships to select female students interested in the institutional investments industry. Please reach out to the head of our Philanthropy Committee, Carrie-Ann Stepien ([carrie-ann@wiiin.org](mailto:carrie-ann@wiiin.org)) if you know any college women who may be interested, or if you are interested in serving as a mentor to a WIIIN student member. Thank you to WIIIN's platinum sponsors for making this opportunity available to our future leaders.

## INDUSTRY HAPPENINGS

### INVESTMENT DIVERSITY EXCHANGE (TIDE) – JULY 12 & 13

The Investment Diversity Exchange (TIDE) hosted its highly anticipated annual marquee event on July 12 & 13, in Dana Point, CA. The gathering focused on relevant topics ranging from ESG and fossil fuel divestment in California, to investment perspectives from E&F Funds and Insurance Plans, to a motivational interview with Jay Shetty, award winning author & podcast host. TIDE promotes diversity and inclusion within the investment industry. TIDE breaks down silos and amplifies the voice of the underrepresented communities. TIDE is a partner to the largest US public pension plans in their diversity and inclusion efforts. WIIIN is proud to support TIDE!

### INVESTMENT DIVERSITY ADVISORY COUNCIL'S (IDAC) GLOBAL SUMMIT – SEPTEMBER 19 & 20

WIIIN looks forward to supporting IDAC's Global Summit which will focus on action (beyond words) around "moving the needle" toward greater diversity in the asset management industry. IDAC was launched in February 2020 as an independently operating forum for investment organizations to share best practices and document progress on diversity, equity, and inclusion in the asset management industry. Please visit the event registration page for further info: <https://www.gaveledge.com/IDA2301/home>.

## LIFESTYLE AND ENTERTAINMENT

Here are a few summer recommendations from the Board for book, shows and podcasts. Enjoy!

### BOOKS

- *Demon Copperhead* by Barbara Kingsolver
- *Finding Me* by Viola Davis
- *Hello Beautiful* by Ann Napolitano
- *Maame* by Jessica George
- *Romantic Comedy* by Curtis Sittenfeld
- *The Marriage Portrait* by Maggie O'Farrell
- *The Vibrant Years* by Sonali Dev
- *Wayward* by Emilia Hart

### TV & MOVIES

- *Daisy Jones & the Six* – Amazon Prime
- *Drops of God* – Apple TV
- *Jury Duty* – Amazon
- *Succession* – HBO Max
- *The Bear* – Hulu
- *The Diplomat* – Netflix
- *The Last of Us* – HBO Max
- *Working Moms* – Netflix

### PODCASTS

- *Bone Valley*
- *SelfHealers Soundboard*,  
*The Holistic Psychologist*

## JOB BULLETIN

WIIIN's job bulletin includes opportunities employers have shared with our membership. Please note that any nonprofit organization can post to the WIIIN job bulletin for free. Please also feel free to share the job bulletin with your network and be sure to reference WIIIN when replying to these postings: <http://wiiin.org/Monthly-Job-Bulletin>.

## RESOURCE CENTER

As a reminder, WIIIN has a "Resource Center" on our website: <https://www.wiiin.org/resource-center>. The Resource Center allows our sponsors, members, peer industry organizations, and third parties that WIIIN has collaborated with on programming, to post links, resources and information on their businesses.

## GET INVOLVED WITH WIIIN

WIIIN is always looking for members to volunteer and join our Committees. We invite any members interested in devoting their time and talent to the organization, whether it is by volunteering on the programming, philanthropy or other committees or through sponsorship outreach, to please contact WIIIN's Administrator, Alex Brunelli, at [info@wiiin.org](mailto:info@wiiin.org).

## WIIIN SPONSORSHIP

We are delighted to announce our new sponsors. **American Century Investments** has joined as a Gold sponsor and **MLC Asset Management** and **MetLife Investment Management** have joined as Silver sponsors. Additionally, The Carlyle Group has moved from a Silver to a Diamond sponsor.

The WIIIN Board continues to express sincere gratitude for our generous sponsors enable us to execute on our mission. Thanks to our partnerships, we can provide a platform for education and professional development for women working in the institutional investment industry. We have found creative ways to connect and continue our programming virtually. This would not be possible without our sponsors' continued support, enthusiasm, feedback, and patience.

Please reach out to sponsorship co-chairs Audrey Wang and Chelsea Carbonel at [sponsorship@wiiin.org](mailto:sponsorship@wiiin.org) with any questions or interest in sponsorship. Thanks again to all our sponsors for your continued support: <https://wiiin.org/Sponsors>.

# SPONSORS

PLATINUM



DIAMOND



GOLD



SILVER



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