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### A MESSAGE FROM THE BOARD

To our WIIN Community,

As we usher in a new year, we have several important WIIN leadership updates to share. After six years as president, Co-Founder Lara Clarke has stepped down and will remain an active member of the Board of Directors. Lara co-founded WIIN with Heather Beatty (Co-President 2014-2018) and Maisie Short in 2014 and we remain forever grateful to Lara and Heather for their vision, dedication, and tireless efforts to launch and nurture WIIN as an organization and community.

Effective January 1, Maisie Short assumed the role of President and she will work closely with newly elected Vice President Mary Ruth Newman. Jolie Twiss and Negin Sohrabi were re-elected as Secretary and Treasurer of the organization respectively, roles they have served diligently and judiciously for the last few years. Additionally, after three years of co-chairing the programming Committee, Teri Noble has transitioned her leadership responsibilities to Robin Fujimoto (2020 Co-Chair), Audrey Wang, and Marisa Walters who will spearhead WIIN's 2021 slate of programming.

You have likely already seen a flurry of activity as we are building out the programming calendar for the first half of the year. Consistent with WIIN's mission as an education-focused non-profit, we are developing rich content that is pertinent to capital markets, as well as personal and professional development. The Programming Committee has also incorporated a wellness series in recognition of the unique challenges presented by COVID-19. The Programming Committee has creatively and thoughtfully adapted to virtual event planning and we sincerely appreciate their contributions and enthusiasm as we collectively navigate the complexities of a remote environment, both personally and professionally. We hope that you can join us for any and all events relevant and interesting to you and as always, we welcome your feedback and suggestions.

Finally, we would like to update you on our organizational efforts to approach Diversity, Equity and Inclusion more broadly. Women in Institutional Investments Network was founded to promote gender diversity in a very male-dominated industry; however, we recognize that achieving a more diverse and equitable society requires that we think beyond gender. As an initial step in our journey toward advancing DEI initiatives both within WIIN and our workplaces, we have formalized a committee dedicated to DEI that will be co-chaired by Teri Noble and Chauncey Peebles. The group will think holistically about how to thoughtfully integrate DEI best practices into our programming, philanthropy, membership, and our engagement with other diversity organizations and thought leaders. We look forward keeping you apprised of the committee's progress and are grateful to Teri and Chauncey for their passion and advocacy on this important topic. These are difficult times and we appreciate your continued support of WIIN as we navigate uncharted territory. Please don't hesitate to reach out to your board with any feedback—we are here for you.

Please be safe and stay healthy!

***The WIIN Board***

## PROGRAMMING RECAP AND UPCOMING EVENTS

### ANNUAL LUNCHEON RECAP

On September 24, 2020, WIIN held its Fourth Annual Luncheon: **Breaking the Glass Ceiling**, featuring former White House Correspondent Jessica Yellin as the keynote speaker. WIIN also recognized its 2020 honoree, Ms. Lisa Mazzocco for her decades of contributions to the institutional investing community. Ms. Mazzocco is the former Chief Investment Officer for the University of California and a member of the WIIN Advisory Council. Ms. Yellin's presentation focused on the celebration of the 19th Amendment and the upcoming election, providing insights into political and social issues that dominated the news cycle in 2020. The luncheon marked WIIN's first virtual event using the Remo platform. Given the positive feedback we received and connectivity the platform affords, the Programming Committee has decided to use Remo for all virtual flagship events in 2021. Informal events will be hosted on Zoom.

### ANNUAL 2021 MACRO EVENT RECAP

On January 21, 2021, WIIN hosted its annual macro outlook event, **The Path Ahead: A Global Discussion of Secular Trends and the Implications for Client Portfolios**, featuring an interactive panel of four influential women from global investment and consulting firms to discuss the year ahead, global mega trends, and the potential implications for client portfolios. The panel discussion was once again followed by virtual networking using the Remo platform. Our moderator, Rose Dean (Managing Director, Consultant, Wilshire) led the discussion with Samantha Azzarello (Executive Director, Global Market Strategist, JP Morgan), Maddi Dessner (Global Asset Class Services Director, Capital Group) and Frances Donald (Managing Director, Global Chief Economist & Global Head of the Macroeconomic and Strategy Team, Manulife Investment Management). The event was well attended and armed our members with market insights to help inform their outlooks for the year ahead.

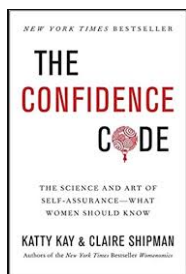
### UPCOMING EVENTS FOR WINTER/SPRING 2021

#### February 10, 2021 | Wednesday | 5 PM

Please join WIIN for the second event in our 2021 Wellness Series, "New Year, Let's Get Healthy Together" with Jessica Klingbaum, Certified Aromatherapist. Join us for a fun, informative and interactive workshop, where you'll learn the basics of essential oils and aromatherapy. The deadline to register for this event is today: <https://wiin.org/event-4111740>

#### February 24, 2021 | Wednesday | 5 PM

WIIN will be hosting our first virtual book club of 2021. We will be diving into *The Confidence Code: The Science and Art of Self Assurance - What Women Should Know* by Claire Shipman and Katty Kay. Confidence. We know it when we see it or think we do. And we want it for ourselves. Journalist Shipman and Kay deconstruct this essential, elusive, and misunderstood quality and offer a blueprint to bring more of it into our lives. We are looking forward to the discussion and hope to see you there.



### Career Series

WIIN has partnered with Inside Out Incubator, co-founded and run by Gina Restani and Alicia Jabbar, to bring our members a three part career development series. Together, Gina and Alicia have worked with thousands of professional women and have over a decade of combined executive coaching experience.

#### ● Session 1: Break the Rules

##### Tuesday, March 2 | 4 PM

There is a pervasive set of rules holding women back in their careers—and we can't always see them. In this session, you will:

- Find out the 10 hidden rules to look out for
- Identify which rule holds you back the most
- Learn how to defy it (and still get ahead)
- Learn a framework to transform conventional best practices into personal ones
- Create immediate action steps that align with your new strategy

#### ● Session 2: Quieting the Voice of Your Inner Critic

##### Tuesday, April 6 | 4 PM

Do you ever hear that voice in your head that tells you that you are thinking too big? Or that what you most want is an unrealistic dream? In this session, you will learn tools to help you quiet that voice so you can pursue your leadership goals with more ease.

#### ● Session 3: Establishing a Career Plan

##### Tuesday, May 4 | 5 PM

In this session, you will learn how to create a plan for your career that both excites you and works for your current life priorities. You will get clear on what you want for your future and understand how to back into that plan beginning today. This process will serve you for where you are now and can be leveraged again and again as your priorities shift (and they will).

### SAVE THE DATE: Wednesday | April 22, 2021

WIIN has scheduled our second flagship event of 2021 on April 22. The focus will be on **Private Markets** and we are diligently working to bring you a relevant and robust agenda. Please keep your eye out for further details and event invites.

We are excited to build programming that meets our current social distancing needs while maintaining the integrity of our educational programming. Our upcoming programming will be virtual until further notice.

## PHILANTHROPY UPDATE

Thanks to all that participated in the **WIIIN Philanthropy Committee's #2020giveback Virtual Fundraiser** and Happy Hour! With your contributions we donated to over 20 charities supporting women, children, the homeless and those in need. Our Donor's Virtual Cocktail hour was held November 19, and it was great to connect and celebrate with all that stepped up during the holiday season to donate.

## STUDENT MEMBERSHIP OPPORTUNITY

As we shared in our last newsletter, WIIIN is offering fully sponsored one-year memberships to select female students interested in the institutional investment industry. Please share the application (<https://www.surveymonkey.com/r/SDKQSO2>) with any college women who may be interested. Thank you to WIIIN's platinum sponsors for making this opportunity available to our future leaders.

We will continue to focus our philanthropy efforts on addressing issues that impact BIPOC women, and encourage our members to reach out to the head of our Philanthropy Committee, Carrie-Ann Stepien ([carrie-ann@wiiin.org](mailto:carrie-ann@wiiin.org)) with any ideas to further support this effort.

As a reminder, we have set up WIIIN's **AmazonSmile** profile (please search for "Women in Institutional Investments Network WIIIN" to add to your Amazon account). Amazon donates 0.5% of the price of eligible purchases when you join AmazonSmile.

## LIFESTYLE & ENTERTAINMENT

As we continue to settle into a new normal of balancing work, family, and everyday life, we are happy to share some of the lifestyle and entertainment the Board has been enjoying.

### BOOKS

- **Atomic Habits: An Easy & Proven Way to Build Good Habits & Break Bad Ones** by James Clear
- **Hamnet** by Maggie O'Farrell
- **Invisible Women: Exposing Data Bias in a World Designed for Men** by Caroline Criado-Perez
- **Quit Like A Woman: The Radical Choice to Not Drink in a Culture Obsessed with Alcohol** by Holly Whitaker
- **The Henna Artist** by Alka Joshi
- **Why We Sleep** by Matthew Walker

### TV & PODCASTS

- Bridgerton - Netflix
- I May Destroy You - HBO
- Life Kit: NPR (podcast)
- Unlocking Us with Brené Brown (podcast)

### APPS & LIFEHACKS

- Peloton
- Audible
- Thistle
- Notability
- Headspace

## LOCAL EVENTS

WIIIN members are invited to attend the following events:

**Nuveen's LEAD** (Leadership Education Advocacy and Development) organization is holding their **Annual Meeting** on February 2 & 3, featuring authors and educators to discuss the progress of gender equality in a post-coronavirus world. The event will feature Glennon Doyle (author of the New York Times bestseller *Untamed*), Marissa Orr (author of the bestseller *Lean OUT*), and Dr. Stefanie Johnson (Professor at U of Colorado and author of *Inclusify*), among others. For more information and registration details, please visit:

[https://web.cvent.com/event/e552dda1-ca92-4e51-9964-6752d0b7f136/summary?rt=\\_jp14gMgzk6-nnEMhp8-gQ](https://web.cvent.com/event/e552dda1-ca92-4e51-9964-6752d0b7f136/summary?rt=_jp14gMgzk6-nnEMhp8-gQ)

The **USC Alumni Entrepreneurs Network** is proud to present the **Working Wardrobes Clothing Drive** to support this non-profit in gathering up career-appropriate attire to donate to men and women attending job interviews. Over the next few months, we're collecting men's and women's new or gently-used clothing and accessories, to donate to working wardrobes for our USC Alumni Day of SCservice in March. For more details on how to get involved, please visit:

<https://mailchi.mp/8c29b43dadb1/usc-2021clothingdrive>



**WIIIN is now on INSTAGRAM! @wiiinla**

Please follow and like the latest event updates and newsworthy content.

## JOB BULLETIN

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

## GET INVOLVED WITH WIIN

**WIIN's is currently looking for members to volunteer and join Sponsorship Committee.** We invite any members interested in devoting their time and talent to the organization, whether it is by volunteering on the programming or philanthropy committees or through sponsorship outreach, to please contact the organization's Administrator, Renee Wolf of Talley Management Group, at [info@wiin.org](mailto:info@wiin.org).

## SPONSORSHIP

The WIIN Board wants to express sincere gratitude for our generous sponsors who have supported our organization through our most challenging year. 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.

We are happy to announce our new sponsors. **Manulife Investment Management** has joined as a Platinum Sponsor, **Canyon Partners** has expanded their involvement by becoming a Diamond Sponsor, and **Angeles Investments** came onboard as a Silver Sponsor. Please contact Chaunce Wilks, co-chair of WIIN's sponsorship committee, at [chaunce@wiin.org](mailto:chaunce@wiin.org) for more information. Thanks again to our new, renewing and current sponsors for your continued support: <http://wiin.org/Sponsors>.

# SPONSORS

PLATINUM



DIAMOND



GOLD



SILVER



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