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A MESSAGE FROM THE BOARD

To our WIIN Community,

In the spirit of International Women’s Day on March 8th, we are delighted to share with you the updates and achievements since WIIN’s last newsletter in the of summer 2023. It’s been a period of vibrant activity and meaningful engagement within our community.

In October, we were thrilled to host the sold-out luncheon featuring esteemed speakers Geraldine Jimenez from CalSTRS and Mara Liasson from NPR. This event, along with our Philanthropy Committee’s packing party and a thought-provoking virtual event on C-PACE, climate risk, and other sustainability considerations in real assets, rounded off our programming for the year on a high note.

In November, the WIIN Board met for a strategic planning session facilitated by Deidre Lind and Jan Kern from [A Better Impact](#). The purpose was to ensure we are evolving in alignment with the needs of our members and sponsors while advancing our mission and preserving the organization’s culture. We identified some long-term goals and remain steadfast in our mission to empower women in the southern California institutional investments industry and recommit to providing value to our members and sponsors.

To that end, your feedback is vital to us. We send out periodic surveys to gauge your satisfaction, and we encourage you to participate. Equally, we invite you to share your thoughts and suggestions as they come up, by reaching out at any time to info@wiin.org.

We are filled with excitement for the 2024 lineup of events planned. As we approach our 10-year anniversary in September, we look forward to celebrating this significant milestone with you this fall. It will be a time to reflect upon our journey, honor the vision of our founders, and to express gratitude for the invaluable support of our sponsors and the hard work and dedication of our volunteers.

Thank you for your continued support and engagement with WIIN. Together, we are making a difference, fostering community, encouraging individual growth, and promoting inclusivity in our industry. We look forward to the opportunities and achievements that 2024 will bring!

With gratitude,

The WIIN Board

ORGANIZATIONAL UPDATES

WIIIN is happy to announce the launch of our redesigned website (www.wiinin.org). We have expanded our “Who We Are” section to include WIIIN’s Board, Advisory Council and committee leaders, WIIIN’s HERstory, committee descriptions and DEI resources. We have also expanded our Resource Center as a repository for past newsletters, book club books and event resources. Additionally, we streamlined our most trafficked page, the Job Bulletin and have added pictures from our 2023 annual luncheon and other recent past events to the Event Gallery. Please check out the new site when you have a moment!

WIIIN is also pleased to announce Lisa Herbert and Trish Go have been elevated as volunteers to lead our marketing and communication efforts. Lisa will oversee WIIIN’s brand and marketing and Trish will oversee WIIIN’s social media and website. The Board is excited to have the expertise of both Lisa and Trish to enhance our brand. Please remember to follow us on LinkedIn and Instagram for event info and other content (links below!)

WIIIN MENTORSHIP

Our inaugural mentorship program was a tremendous success! More than 65 members participated, and we have received a wealth of feedback validating that this program is an important part of what WIIIN can offer our community. We want to sincerely thank all those that participated in our 2023 program and please be on the lookout for an email regarding the launch of the 2024 program which will commence with a virtual event in late March. All WIIIN members are invited to attend this kick-off event, where we will speak with [Josh Diosomito](#), Global Head of Mentorship at Capital Group, regarding how to maximize the impact of mentor/mentee relationships in our daily lives. In addition to Josh’s role at Capital Group, he is a certified DEI facilitator, consultant and speaker, specializing in raising awareness of DE&I issues. Invitation and registration details are forthcoming.

WIIIN DIVERSITY

In 2023, we focused on DEI strategy development and implementation, and are proud to build upon this work and emphasize belonging in 2024. To that end, our work this year will be focused on continued training and development, increased spend towards diverse vendors, diverse panel discussions and incorporating the diversity and inclusion principals we’ve developed into all WIIIN programming. We welcome all ideas! If you are interested in joining the committee, please reach out to info@wiinin.org.

WIIIN PROGRAMMING

UPCOMING 2024 EVENTS

FIXED INCOME EVENT: INTEREST-ING TIMES: MAPPING OPPORTUNITIES IN FIXED INCOME AHEAD

On Wednesday, February 28th, WIIIN is starting off the programming slate with an in-person investment event in DoubleLine’s downtown LA offices, focused on the opportunities in fixed income markets ahead. We will be joined by portfolio managers, Giang Bui, Securitized Debt & Bank Loans at PIMCO, Kristin Ceva, Phd, Managing Director at Payden & Rygel and Mariya Entina, CPA, CFA, Global Developed Credit at DoubleLine. Karyn Williams, Regional Investment Manager of North America at Zurich Global Investment Management will be moderating the discussion. Prior to the discussion, members will have the opportunity to enjoy breakfast, coffee and networking. Please visit the event registration page for further information: <https://wiinin.org/event-5601955>.

JUNIOR ACHIEVEMENT CAREER EMPOWER SUMMIT

In support of Financial Literacy Month, WIIIN will once again be partnering with Junior Achievement (<https://jasocal.org>) on a Career Empowerment Summit in April. Last year, members had the opportunity to spend the day with students from Carson High, answering questions and providing guidance on opportunities on a range of topics from personal finance to pursuing a career in investments. On the back of a successful event last year, we are excited to continue our impactful partnership with JA SoCal. Invitation and registration details are forthcoming.

2H 2023 PROGRAMMING RECAP

VIRTUAL DEI TRAINING WITH JOHNSON SQUARED ON NEURODIVERSITY IN THE WORKPLACE

In August, WIIIN hosted its second virtual DEI workshop with DEI consultant, Johnson Squared, focusing on Neurodiversity in the Workplace. Dr. Jade Singleton and Noelle Johnson created an intimate, members-only discussion on neuroinclusion and understanding the unique perspectives of all colleagues. Participants came away with actionable items to foster better inclusion in the workplace.

SUMMER HAPPY HOUR

Later in August, we hosted our annual members-only happy hour at Bodega Wine Bar in Santa Monica, bringing together a broad ranging group of women for a casual and fun evening of refreshments and networking.

2023 ANNUAL LUNCHEON: INVESTING IN A POLITICAL WORLD



In October, WIIN hosted its seventh Annual Luncheon at the Intercontinental in Downtown LA. We were fortunate to have Mara Liasson, National Political Correspondent for NPR, join us to share her views on the political climate leading into the 2024 elections and its impact on capital markets. Geraldine Jimenez, Senior Investment Director, Public Markets at CalSTRS led a fireside chat with Mara engaging the audience in a fantastic Q&A session. In addition, we were thrilled to honor one of our long-time WIIN members, Marina Batliwalla, Senior Investment Consultant for Mercer, for her dedication to advancing financial literacy amongst women of all ages. Following the event, attendees gathered for refreshments and networking on the outdoor terrace. The luncheon turned out to be WIIN's best attended event to date, with over 300 attendees.

FALL PACKING PARTY

In November, WIIN hosted our annual community building activity to assemble 1,400 shower and personal hygiene kits for homeless women served by one of LA's largest female-focused charities, Downtown Women's Center (<https://downtownwomenscenter.org>). DWC is the only organization in Los Angeles focused exclusively on empowering women experiencing, or transitioning from, homelessness. The WIIN Philanthropy Committee would like to thank all our attendees and donors, including Wilshire, which hosted the event this year at their offices in Santa Monica.



UNLOCKING SUSTAINABLE VALUE: C-PACE, CLIMATE RISK IN COMMERCIAL REAL ESTATE, AND ESG CONSIDERATIONS FOR REAL ASSETS

In December, WIIN hosted its final event of the year, a virtual panel discussion with ESG and sustainability experts, Alexandra Cooley, CIO and Co-Founder of Nuveen Green Capital, Regan Smith, Managing Director, Sustainable Investing, Real Estate Equity and Infrastructure of Manulife Investment Management, and Lindsey Walton, Director of Americas at PRI (Principles for Responsible Investment). The event, moderated by WIIN Programming Committee member Yvette Elizalde of Meketa, proved to be an insightful and educational discussion on framing and achieving sustainability in real assets.

WIIN OUTREACH

STUDENT MEMBERS

WIIN continues to offer \$50 annual memberships to SoCal-based female college students interested in the institutional investments industry. Thank you to WIIN's sponsors for making this opportunity available to our future leaders. Please contact info@wiin.org for further information.

INDUSTRY HAPPENINGS

National Association of Security Professionals (NASP) Southern California, is hosting its 2024 Day of Private Equity Education on March 21, 2024 at the Ritz Carlton in Marina del Rey. WIIN member Stephanie Ivy is on the Board and a portion of the event's net proceeds will benefit the Fast-Trak program which is designed to expose disadvantaged high school students from underserved communities to the broader world of business and finance through mentoring, workshops, in-class training and other educational experiences. For further information and registration, please visit: <https://www.naspsocal.org/index.htm>

WIIN will partner once again with Markets Group on ALTSLA24, taking place on March 18-20, 2024, at the InterContinental Los Angeles Downtown. Led by [CFA Society Los Angeles](#), [CAIA Association](#) and [CalALTs \(The California Alternative Investments Association\)](#), this event is the annual meeting place and an educational hotspot for those seeking the very latest in alternative investment news and developments. It has become a hub for alternative investment leaders from all over the country.

Secure your spot now at: <https://lnkd.in/dsQbhEV6>

Managers and/or Service Providers who are members of WIIN are entitled to a 25% discount of the listed price. Please use the code **WIIN25** when registering to access this discount.

LIFESTYLE AND ENTERTAINMENT

We are delighted to share some of the lifestyle and entertainment we are enjoying:

BOOKS

- *Fourth Wing* by Rebecca Yarros
- *It. Goes. So. Fast.* by Mary Louise Kelly
- *Remarkably Bright Creatures* by Shelby Van Pelt
- *The Fund* by Rob Copeland
- *The Many Lives of Mama Love* by Lara Love Hardin
- *The Myth of Normal* by Gabor (and Daniel) Maté
- *The Only One Left* by Riley Sager
- *The Unmaking of June Farrow* by Adrienne Young
- *The Wager: A Tale of Shipwreck, Mutiny and Murder* by David Grann

TV & MOVIES

- *Barbie*
- *The Holdovers*
- *Lessons in Chemistry* – Apple TV
- *The Morning Show (Season Three)* – Apple TV
- *Love on the Spectrum* – Netflix
- *True Detective (Season Four)* – Max
- *Fool Me Once* – Netflix
- *Boy Swallows Universe* – Netflix

PODCASTS

- *Pivot*
- *Worklife with Adam Grant*

JOB BULLETIN

Our job bulletin includes a curated selection of current employment opportunities. Please note that any nonprofit 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: (<https://wiiin.org/Monthly-Job-Bulletin>). If visiting our Job Bulletin results in employment, please email info@wiiin.org and let us know.

RESOURCE CENTER

As noted above, WIIN has expanded the Resource Center on our website (<https://wiiin.org/Resource-Center>). The Resource Center now includes past newsletters, book club books, and the event resources hub. The event resources hub is a place for our sponsors, members, peer industry organizations, and third-party programming collaborators, to post links, resources and information on their businesses.

GET INVOLVED

WIIN is currently looking for members to volunteer and join our **Programming, Sponsorship and Philanthropy 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 info@wiiin.org.

SPONSORSHIP

The WIIN Board would like to express sincere gratitude to our generous sponsors who have supported our organization. Thanks to your partnership, we can execute on our mission of providing a forum for education and professional development for women in the institutional investment industry.

We are currently reviewing our sponsorship program as we look to most effectively serve WIIN's sponsors and support our programming. Thank you to our sponsors that filled out the sponsor survey in January. We welcome any additional feedback and can be reached at our team mailbox at sc@wiiin.org. We are excited for the future of our sponsorship program and will notify you of any changes as we grow together as a community.

We are delighted to announce our newest sponsors: **Artisan Partners** and **Goldman Sachs** have joined as Diamond sponsors. **Mercer** has joined as a Gold sponsor. **HPS Investment Partners, LLC, Natixis Investment Managers, Paradise Investment Management, and Polen Capital** have all joined as Silver sponsors.

Please visit our Sponsor page at wiiin.org/Sponsors for a list of our current sponsors and further explore sponsorship opportunities at wiiin.org/Sponsorship-Program. Thanks again to all our sponsors for your continued support!

SPONSORS

PLATINUM



DIAMOND



GOLD



SILVER

