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## A MESSAGE FROM THE BOARD

To our WIIN Community,

We hope you were able to decompress over the holidays as 2022 has been off to a trying start amidst the Omicron surge. We will be starting out the year with virtual programming in hopes of a return to in-person this spring and are developing a robust and varied slate of content under the leadership of our Programming Chairs Audrey Wang, Sarah Lohrey and Christina Yi. We are thrilled to have Sarah and Christina joining Audrey to head WIIN's programming efforts as they have been phenomenal contributors to the committee. We would also like to thank outgoing chairs Robin Fujimoto and Marisa Walters for their incredible service to the organization during 2021. Additionally, we are delighted to announce that Robin Fujimoto and Audrey Wang have joined the WIIN Board. They have been among the organization's most dedicated volunteers and we look forward to their counsel at the Board level.

At the end of 2021, the Board met with a Board consultant to help frame our five-year vision. Among the key takeaways was a shared desire to continue to develop leading edge content and to provide an inclusive, safe and relevant environment to amplify women's experiences. Part of our five-year plan will be expanding our focus on DEI under the leadership of our DEI Committee Co-Chairs Anisha Goodly and Katrina Post. Anisha and Katrina have been advocates within their own firms and will manage our ongoing engagement with our DEI advisors, Johnson Squared Consulting. Thank you those who submitted responses to the DEI questionnaire we sent out late last year, your responses were critical in determining our path forward as an organization.

Lastly, since WIIN's founding in 2014, there has been interest in developing a Mentorship Program, but to date we have not had the resources or Board bandwidth to execute on this vision. Kim Wood of Capital Group and a founder of WIN St. Louis has volunteered to spearhead our mentorship initiative and we will be sending out a survey shortly to gauge our members' interest in entering a mentor/mentee pairing. Advisory Council members Eileen Neill and Kristin O'Connor and Programming Committee members Rose Dean and Alison Schiraldi have played an instrumental role in helping to shape the Mentorship Program and we hope it provides a source of connectivity and professional development for those who are interested.

Thank you all for your continued enthusiasm and support of WIIN and we look forward to seeing you soon.

With gratitude,

**The WIIN Board**

## PROGRAMMING RECAP

WIIIN would like to thank our community for your continued support in growing with us as we have expanded our programming. As the pandemic has brought many changes to all our lives, with the help of Zoom and Remo, WIIIN was able to bring more events to our community in 2021 focusing on a wide range of personal and professional development issues. With the help of the online platforms, WIIIN held a record 15 events online in 2021, including two book clubs! We are thrilled to have a great team of volunteers on WIIIN's Programming Committee who were able to think outside the pandemic box and bring our members and sponsors quality programming. Here is a recap of our events that have taken place since our last Newsletter:

- **Starting Your Journey to a Board Seat**

On September 22, 2021, Adriana Azuri and WIIIN Advisory Council member, Martha Spano, hosted a Zoom session on the journey to securing a Board Seat. The session focused on board branding, participation, and the importance of BIPOC women having a seat in the Boardroom. Adriana and Martha provided valuable marketing insight on board bios, board resumes, LinkedIn and social media. We thank Adriana and Martha for sharing their knowledge and expertise with our members.

- **Fireside Chat: A Candid Conversation with Roz Hewsenian, CIO of the Helmsley Charitable Trust**

On October 21, 2021, WIIIN Board member Leah Emkin hosted a fireside chat with Roz Hewsenian, CIO of the Helmsley Charitable Trust, via Zoom. Roz discussed her career journey in the financial services industry and spoke about lessons learned during the different phases of her career, which include roles with Wilshire,

as CEO of Clay Finley, and CIO of the Helmsley Charitable Trust. We are grateful to Roz for joining us and providing valuable insights from her impressive career.

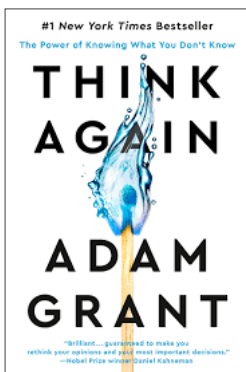
- **AI, Blockchain & Impact Investing: Disrupting Asset Management & Shaping the Future of Institutional Investing**

On November 3, 2021, WIIIN hosted our last flagship event of 2021 focused on AI, Blockchain and Impact Investing via Remo. Speakers Julia Bonafede, Co-Founder of Rosetta Analytics, and Priscilla Guevara, Head of Investor Relations for Science, Inc., and Moderator Felicia Berryman of Macquarie Asset Management had a captivating conversation about buzzworthy topics in our industry, such as fintech, blockchain, SPACs, consumer VC, and impact investing. Julia and Priscilla are innovators in the world of non-traditional investing and shared how they and companies such as theirs contribute to the advancement of the industry, bringing us into the future of innovative investing.

- **Modern Business Etiquette Made Easy with Myka Meier**

On December 14, 2021, Myka Meier, Founder and Director of Beaumont Etiquette, hosted WIIIN members in a private session on business etiquette, networking and formal dining manners. Myka shared tips on how to become instantly more authoritative in business, and how to elegantly, yet tactfully, network a room. The Zoom session was followed by a Q&A, where Myka addressed additional etiquette questions from our members. We thought exploring etiquette was a great way to get together and close out the year, and thank our members and Myka for their participation.

## UPCOMING EVENTS FOR WINTER/SPRING 2022



**February 17 – Book Club**  
**“Think Again” by Adam Grant**

*LISTEN to ideas that make you think hard—not just opinions that make you feel good.*

On February 17, we will be hosting our first book club of the year to discuss “Think Again” by organizational psychologist Adam Grant.

As an organizational psychologist, Adam Grant is an expert on opening other people's minds—and our own. As Wharton's top-rated professor and the #1 New York Times bestselling author of *Originals* and *Give and Take*, one of his guiding principles is to argue like he's right but listen like he's wrong. With bold ideas and rigorous evidence, he investigates how we can embrace the joy of being wrong, harness the surprising advantages of impostor syndrome, bring nuance to charged conversations, and build schools, workplaces, and communities of lifelong learners.

This book is an invitation to let go of views that are no longer serving us well and prize mental flexibility, humility, and curiosity over foolish consistency. If knowledge is power, knowing what we don't know is wisdom.

## UPCOMING EVENTS FOR WINTER/SPRING 2022 (cont'd.)

### March 2, 2022 – Intersection of Public Policy and Markets in a Mid-term Election Year

On March 2, WIIN will hold our first flagship event of 2022, featuring Libby Cantrill, Head of Public Policy at PIMCO. Libby will be exploring the intersection of policy and capital markets, looking ahead to the mid-term elections and market outlook. Libby helps to coordinate PIMCO's response to public policy issues and analyzes policy and political risk for the firm's Investment Committee. Prior to joining PIMCO, she served as a legislative aide in the House of Representatives. This event will be held on the Remo platform and will be free to members and female non-members!

### March 24, 2022 – Pickleball

Not quite ping pong, not quite tennis, easy to learn and lots of fun! Come see what all the rage is about: Pickleball. Please join WIIN for an evening of Pickleball instruction, play and networking.

### Early April – DEI Workshop on Intentional Allyship

In early April, WIIN, in partnership with Johnson Squared Consulting, will host a DEI in Action Workshop on Intentional Allyship. This member's only event will be a safe space to develop the tools and vocabulary to become better allies within our workplaces. Date is TBD; we are targeting early April.

#### Please keep your eye out for the event invites, locations and times.

While we are anxious to see each other again in person, we want to be mindful of the fact that COVID-19 is still a threat. When we do go back to in-person events, to protect our members and community, WIIN will be following the guidance of the CDC, State and LA County health officials who strongly recommend that attendees be fully vaccinated or obtain a negative COVID-19 viral test prior to attending the event. Mask requirements will be dependent on the venue.

## PHILANTHROPY COMMITTEE UPDATE

### Junior Achievement Girl's Empowerment Summit Volunteer Event (Virtual)

WIIN, in partnership with Junior Achievement (JA), is looking for 20-25 volunteers to participate in the (virtual) Girl's Empowerment Summit on Thursday, March 10, 2022. The Girl's Empowerment Summit is an inspiring event connecting Los Angeles area businesswomen, serving as role-models, with Los Angeles area female high school students. Break-out sessions and guided discussions will focus on the student's future after high school, with the goal of instilling confidence by sharing your personal stories, education and career path, to help empower students and stress the importance of education.

When: **March 10, 2022, 3:30-4:45pm**

Where: **Virtually with South Gate High School**

Total time commitment: **1 hr 15 min at the event plus a 30-45 min prep session with Junior Achievement 1-2 weeks prior to the event. Minimal to no prep time needed!**

Please sign up here by February 15, 2022 if you are interested:

[https://docs.google.com/spreadsheets/d/1OjeHa0m30-CiYxxEwF4F\\_mVWQLsF-lhmrIYD2r-kuE/edit?usp=sharing](https://docs.google.com/spreadsheets/d/1OjeHa0m30-CiYxxEwF4F_mVWQLsF-lhmrIYD2r-kuE/edit?usp=sharing)

Junior Achievement So Cal is a longstanding non-profit youth organization that works with local businesses, schools, and organizations to deliver experiential learning programs in the areas of work readiness, financial literacy, and entrepreneurship to students in the Southern California area.

## STUDENT MEMBERSHIPS

As previously communicated, WIIN is offering fully sponsored one-year memberships to select female students interested in the institutional investments industry. We are excited to share that we currently have eight student members. Please reach out to the head of our Philanthropy Committee, Carrie-Ann Stepien ([carrie-ann@wiin.org](mailto:carrie-ann@wiin.org)) if you know any college women who may be interested, or if you are interested in serving as a mentor to a WIIN student member. Thank you to WIIN'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 women in our local community.

As a reminder, we have set up WIIN's **AmazonSmile** profile (please search for "Women in Institutional Investments Network WIIN" to add to your Amazon account). Amazon donates 0.5% of the price of eligible purchases when you join AmazonSmile. WIIN received \$228.58 in AmazonSmile donations in 2021. We thank all that supported us through Amazon this year!



**WIIN is on INSTAGRAM!**

**@wiinla**

Please follow and like for WIIN event photos, updates and newsworthy content.

## RESOURCE CENTER

As we mentioned in our last newsletter, WIIN has added a "Resource Center" to our website: <https://www.wiin.org/resource-center>. The Resource Center will allow our sponsors, members, peer industry organizations, and third parties that WIIN has collaborated with on programming, to post links, resources and information on their businesses. It is important for our members to have access to the resources we gain through our educational and personal development programming, and are excited to provide that link through [www.wiin.org](http://www.wiin.org).

## LIFESTYLE & ENTERTAINMENT

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

### BOOKS

- **Maybe You Should Talk to Someone** by Lori Gottlieb
- **The Four Winds** by Kristin Hannah
- **The Language of Flowers** by Vanessa Diffenbaugh
- **The Midnight Library** by Matt Haig
- **The First Wife** by Erica Spindler

### TV & MOVIES

- Only Murders in the Building (Hulu)
- Queen's Gambit (Netflix)
- For All Man Kind (Apple TV)
- Encanto (Disney+)
- Shang-Chi and the Legend of the Ten Rings (Disney+)

### ACTIVITIES & APPS

- Pickleball
- Daily Harvest Deliveries
- Bianca's Culver City (Italian Restaurant)
- Virtual Snow - Ski and Snowboard Lessons
- Trello - Organization/Task App

## GET INVOLVED WITH WIIN

WIIN's is currently looking for members to volunteer and join our **Finance Committee** and **Mentorship Program**. 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 the WIIN's Administrator, Jenifer McDonald, at ([jenifer@wiin.org](mailto:jenifer@wiin.org)).

## SPONSORSHIP

The WIIN Board wants to express sincere gratitude for our generous sponsors who have supported our organization. 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. **Breakthrough Properties** and **Pacific Life** have joined as silver sponsors and **Macquarie** has joined as a gold sponsor. Please contact Chaunce Wilks, 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>).

## JOB BULLETIN

Our job bulletin includes opportunities employers have shared with our membership. 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: <http://wiin.org/Monthly-Job-Bulletin>.

# SPONSORS

PLATINUM



DIAMOND



GOLD



SILVER



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