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A MESSAGE FROM THE BOARD

To our WIIN Community,

It was wonderful to see so many of you for our annual luncheon in October—WIIN's best attended event to date! The energy was palpable and we are thrilled to carry that positivity and momentum into the new year. Consistent with our mission of empowering women within our community, our Board is very intentional about succession planning and developing a pipeline of future leaders. As of January 1, Mary Ruth Newman has assumed the role of President and Chaunce Wilks will serve as Vice President. Co-founders Maisie Short and Lara Clarke will transition to the roles of Immediate Past President and Advisory Council member, respectively. Additionally, Alison Schiraldi and Christina Yi have joined the WIIN Board of Directors, and we are excited by the energy and perspective this leadership team will bring to the organization in 2023 and beyond.

Audrey Wang has completed her two-year term as Programming Committee Chair and her contributions have been innumerable. We are incredibly grateful to Audrey and delighted she has moved to Co-Chair WIIN's Sponsorship Committee for the year ahead. Finally, Teri Noble will lead our partnerships initiative and help to develop a strategy to amplify WIIN's impact through select engagements with other mission aligned groups.

As many of us seek to set intentions for the new year, on January 9, the WIIN Board and DEI Co-Chairs participated in a training on Equitable Leadership. As we continue our DEI journey, our leadership team delved into topics such as building institutional courage and cultural humility. We are committed to the self-study and are striving to ensure that WIIN provides an inclusive, safe and relevant environment that amplifies women's experiences and promotes competence with a "pay-it-forward" collective mentality.

Coming off a trying few years, we are collectively feeling tremendously grateful for this village. The organization is fortified with a group of phenomenal volunteers brimming with fantastic ideas that we can't wait to bring to light in 2023.

With gratitude,

The WIIN Board

ORGANIZATIONAL UPDATES

WIIIN is excited to announce effective January 1, 2023, we have partnered with a new Association Management Company, Jaffe Management, Inc. to administer the day-to-day operations of the organization. As a result, our address and telephone numbers have changed. Our new address is **1920 Hilhurst Avenue, #1243, Los Angeles, CA 90027**, and you can reach us by telephone at **(424) 688-5510**. Our contact email remains unchanged (info@wiiin.org). Our telephone and email will be maintained by our new Administrator, Alex Brunelli, Senior Associate at Jaffe Management. We are delighted to be working with Alex and the team at Jaffe.

MEMBERSHIP PRICING UPDATE

Effective July 1, 2023, WIIIN will be increasing the cost of the annual individual membership from \$125 to \$140. WIIIN has maintained its membership price at the same level since the inception of the organization in 2014. We are raising the price to help offset increasing costs and allow us to deliver the same quality programming as have in the past. Reduced cost memberships for students remain unchanged (please see additional info in the Philanthropy update below).

WIIIN DIVERSITY

As part of WIIIN's five-year plan, we are magnifying our focus on Diversity, Equity, and Inclusion (DEI) to ensure that WIIIN serves as an inclusive, psychologically safe space for all members—especially for women from underrepresented groups—and creates valuable educational opportunities on DEI topics affecting women in the investment industry. In 2022, DEI Committee Co-Chairs Anisha Goodly and Katrina Post, along with the Board, worked extensively with Johnson Squared Consulting to create a DEI vision statement and roadmap for our organization, incorporating essential member feedback. You can read the full DEI vision statement here <https://wiiin.org/DEI>.

With our vision statement and progress framework now defined, in 2023, we will focus on the implementation of infusing diversity, equity, and inclusion into all areas of our organization, including programming, philanthropy opportunities, our forthcoming mentorship program, membership, and sponsorship.

Additionally, we are glad to announce that Robin Fujimoto will join Anisha as Co-Chair in 2023, as Katrina assumes the role of Co-Chair of the Programming Committee; Katrina will remain an active participant to ensure we apply a DEI lens to our programs. WIIIN has always strived to provide support, engagement, and education for our members, and we look forward to empowering women to be leading-edge advocates for true inclusion in the institutional investment community.

On April 12, 2022, WIIIN held our first DEI workshop on intentional allyship, via Zoom. Johnson Squared guided an

intimate members-only discussion on how to engage others in the allyship journey and fostered a safe space to develop the tools and vocabulary to become better allies within our workplaces. We thank Jade and Noelle for their expertise, guidance and partnership with WIIIN.

WIIIN PROGRAMMING

WIIIN would like to thank our community for your continued support as we transitioned back to in-person programming in 2022. While we will maintain a balance of virtual and in-person programming, we are very excited to be reengaging in person in Southern California.

UPCOMING Q1 EVENTS

The Why and How of Executive Coaching

On January 26, 2023, WIIIN is thrilled to provide our membership with the opportunity to hear from Susan Lerner, Founder of Libra Coaching. Susan will discuss the value and benefit of working with an Executive Coach to deftly navigate challenges and help maximize our professional potential, including how to utilize personality assessments to help refine our career journey. This virtual members-only event will also provide a forum for our members to engage with each other on this crucial topic.

A Morning of Mentorship

WIIIN will build upon our first virtual event and the launch of our Mentorship Program survey in January with an in-person event that will take members through a detailed training session on mentorship and allyship with industry veteran and trusted coach and corporate consultant, Lisa Lai www.laiventures.com. Lisa has served as a subject matter expert for Harvard Business School and is the author of the popular blog on management, "How to Succeed in Business... Without Eating Your Soul for Breakfast". She will guide us through the importance of mentorship in our personal and professional lives, as well as describe best practices to make the most of our mentor/mentee relationships. We are planning for late March so please be on the lookout for a save the date.

2022 PROGRAMMING RECAP

Here's a recap of our flagship events that took place since our last Newsletter:

Intersection of Public Policy and Markets in a Mid-term Election Year

On March 2, WIIIN held our first flagship event of 2022, featuring Libby Cantrill, Head of Public Policy at PIMCO and hosted by WIIIN Programming Committee member Samantha Foster, via the Remo virtual platform. Libby was invited to WIIIN to discuss the intersection of policy and capital markets, looking ahead to the mid-term elections. Scheduled many weeks in advance, the event ended up falling the day after the State of the Union address and six days after Russia's invasion of Ukraine. Moderator Sam Foster adeptly pivoted

the conversation to incorporate Libby's expert opinion on real-time events and the WIIN community had the opportunity to engage in an interactive Q&A.

The Opportunities and Risks of Sustainability in Emerging Markets

On July 20, WIIN held our second in person and second Flagship event of 2022 at the new Hilton in Culver City. Our panelists, June Kim (Director of Global Equity, CalSTRS), Heather Lord (Head of Strategy & Innovation, Capital Group), Christine Reed (Emerging Markets Debt Analyst, Ninety One) and Vivian Guo (Co-Head of Global Macro ESG, Franklin Templeton) offered their expert insights on the realities of sustainability imperatives in Emerging Markets, unpacked the risks and opportunities, and discussed how recent macroeconomic events have impacted future growth. The panel discussion was expertly moderated by Maggie Ralbovsky (Managing Director, Wilshire Associates) who guided this dynamic and engaging conversation, including an incisive and passionate Q&A with the luncheon attendees.



WIIN held several non-formal events during the year including our February book club in featuring "Think Again" by Adam Grant, Pickleball in May, and our Annual Happy Hour & Headshot Truck Event in August. For more information on our 2022 events, please visit: <https://wiin.org/events>



2022 Annual Luncheon – The Future of U.S. Foreign Policy and America's Role in the World

On October 12, WIIN held our Sixth Annual Luncheon at the California Club in Downtown LA hosting our largest sold-out Annual Luncheon with 250 of our (male and female!) investment community peers. Maisie Short, Co-Founder and President of WIIN moderated a fireside chat between Alison Romano, CEO & CIO of San Francisco Employees' Retirement System (SFERS), and Anja Manuel, geopolitical expert and former diplomat, author, and advisor on foreign policy. Ms. Manuel discussed the future of U.S. foreign policy and America's role in the evolving global geopolitical order, providing an informed analysis from her front-row view of these monumental shifts, first at the State Department and currently as an advisor to global CEOs. As CEO & CIO of SFERS, Ms. Romano brought an investor's perspective to this timely discussion, as we examined the potential impact of these shifts on financial assets. We were also thrilled to honor Eileen Neill, CFA, Managing Director and Senior Consultant at Verus, and a distinguished member of the WIIN Advisory Council. Eileen's introduction by Jeffrey MacLean, CEO of Verus, highlighted her many career accomplishments contributions to the industry.



WIIN PHILANTHROPY

WIIN continues to focus our philanthropy efforts on addressing issues that impact women and at-risk groups in the Southern California community.

2022 EVENTS

Junior Achievement SoCal

Thank you to all WIIN members who participated in the virtual JA SoCal Girls' Empowerment Summit on March 10, 2022. It was an inspiring event, connecting Los Angeles area businesswomen serving as role-models with local female high school students. WIIN member panelists motivated students with personal stories of their own career journeys, instilling students with confidence about what's possible. Break-out sessions led by WIIN volunteers focused on guided discussions about students' futures after high school and the importance of life-long learning.

Thanks also to the WIIN members who also participated in a full day of mentoring at JA SoCal's Finance Park for Immaculate Heart High School on May 16.

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>.

WIIN member Lisa Herbert, who participated in and helped organize both events on behalf of WIIN, was awarded JA SoCal Volunteer of the Year, further cementing our active partnership with this important charitable organization.

Fall Packing Party

On November 16, 2022, WIIN hosted a 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 Chief (<https://chief.com>), which sponsored refreshments.



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 seven student members. Please reach out to the head of our Philanthropy Committee, Carrie-Ann Stepien (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.

INDUSTRY HAPPENINGS

CFA Society San Diego – February 15, 2023

WIIN member Melissa McGrane, President of the CFA Society San Diego, extends an invite to WIIN Members to the CFA San Diego Forecast Dinner: [Forecast Dinner \(cfasociety.org\)](https://cfasociety.org)

NASP So Cal – March 23, 2023

WIIN member and volunteer Stephanie Ivy will help lead "A Day in Private Equity" – [National Association of Securities Professionals - Southern California Chapter \(naspsocal.org\)](https://naspsocal.org)

Alts/LA – March 27-29, 2023

WIIN members will receive a 20% discount if registering as a manager or service provider (**Discount Code – WIINLA20**). Attendance is complimentary for all qualified allocators: [ALTSLA 2023 – The West Coast's Premier Alternative Investment Conference](https://alts2023.com)

Investment Diversity Exchange (TIDE) – July 12-13, 2023

The Investment Diversity Exchange (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.

TIDE is hosting it's highly anticipated annual marquee event on July 12-13 at Dana Point, CA. The event features the most high-profile LP's in the industry. Please view the raving reviews from the 2022 conference: [TIDE SPARK](https://tidespark.com). Confirmed speakers include: Marcie Frost (CalSTRS), Scott Chan (CalPERS), Andrew Junkin (VRS), Fernando Vinzons (CTPF) and many more!

WIIN members are invited to sign up for the limited early-bird tickets while supplies last. TIDE SPARK will sell out. Register at <http://tidespark2023.splashthat.com>. If you're interested in finding out more information about sponsorship, please e-mail michelle@tidexchange.com.

LIFESTYLE AND ENTERTAINMENT

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

BOOKS

- **A Children's Bible** by Lydia Millet
- **An Anonymous Girl** by Greer Hendricks and Sarah Pekkanen
- **How to Invest: Masters on the Craft** by David Rubenstein
- **Signal Fires: A Novel** by Dani Shapiro
- **The Light We Carry** by Michelle Obama
- **Tomorrow, and tomorrow, and tomorrow** by Gabrielle Zevin
- **Verity** by Colleen Hoover
- **You're Not Listening: What You're Missing and Why It Matters** by Kate Murphy
- **Stay True: A Memoir** by Hua Hsu
- **Also a Poet** by Ada Calhoun
- **Olga Dies Dreaming** by Xochitl Gonzalez

TV & MOVIES

- **Dead to Me** – Netflix
- **Gaslit** – Starz
- **The White Lotus** – HBO
- **Fleishman is in Trouble** - FX on Hulu
- **Everything Everywhere All at Once**
- **Puss in Boots: The Last Wish**
- **Top Gun: Maverick**

PODCASTS

- **Archetypes**
- **Invest Like the Best**

JOB BULLETIN

Our 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. It is important for our members to have a link to the resources we gain through our educational and personal development programming, and is happy to provide that link through www.wiiin.org.

GET INVOLVED WITH WIIIN

WIIIN's is currently looking for members to volunteer and join our **Finance Committee** and **Sponsorship Committee**. 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.

WIIIN SPONSORSHIP

The WIIIN 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 delighted to announce our new sponsors. **Canterbury Consulting** has joined as a Platinum sponsor. **BlackRock** has joined as a Diamond sponsor. **Invesco** has upgraded and **Ares Management** and **Marathon Asset Management** have joined as Gold sponsors. **Audax Private Debt, The Carlyle Group, EAM Investors, Newton Investment Management** and **Belay Investment Group**, and have all joined as Silver level sponsors.

Starting in January of 2023, sponsorship will be led by co-chairs Audrey Wang and Chelsea Carbonel. We are excited for the future of our sponsorship program in their hands. Please contact Audrey or Chelsea at Audrey@wiiin.org and Ccarbonel@aresmgmt.com for more information. Thanks again to all our sponsors for your continued support: <http://wiiin.org/Sponsors>.

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