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## A MESSAGE FROM THE BOARD

To our WIIN Community,

We hope you are all enjoying the summer and it was wonderful to see so many of you virtually for the annual luncheon. We were thrilled with the level of participation and engagement for “Listening Louder” and it was a testament of the importance of the topic that our community and supporters showed up in such a meaningful way. We are monitoring the CDC guidelines carefully and had hoped to return to in-person programming by Q4, but with the uptick in cases in Los Angeles and the reimplementation of the indoor mask mandate, the situation continues to evolve. We are committed to ensuring a safe and enjoyable event experience for our members and will keep you apprised as we get more clarity as to when we can reconvene off Zoom.

At the Board level, we are focused on strategic planning around DEI and WIIN’s five-year vision. We have engaged Johnson Squared Consulting, a woman and Black-owned boutique Diversity, Equity, and Inclusion firm to help guide our efforts and look forward to sharing what we learn with our community. Throughout the last year, we have been intentional around hiring women-owned businesses to lead our programming and we have added a Resources tab to the website if you would like to reconnect with any of our recent event facilitators. Additionally, you will find we have added Community Guidelines to our website as a reminder about the overarching objectives of WIIN. The organization seeks to foster a safe and inclusive educational arena for women to build lasting relationships. Marketing of products or services is in direct conflict with the spirit of our mission and we ask that all members and guests respect and protect the supportive environment WIIN tries to facilitate. Additional detail about the policy can be found in the Organizational Updates section of the newsletter as well as on our website.

Thank you all for your continued enthusiasm and support of WIIN. We hope the WIIN community has provided you an outlet during this challenging last year and we will continue to strive to deliver valuable educational content and opportunities for this phenomenal group of women to remain connected.

Stay safe and healthy!

*The WIIN Board*

## ORGANIZATIONAL UPDATES

In late Spring, WIIIN contracted with **McDonald Association Management Co., Inc.** to provide its administrative and member management services. The company is majority woman-owned and is based out of Sacramento. Jenifer McDonald, the founder of the company and Alison Thompson, a member services associate will both be dedicated to WIIIN. You can learn more about them at [www.mcdonaldamc.com](http://www.mcdonaldamc.com). We also have new email addresses for our administrative team: Jenifer McDonald—[jenifer@wiiin.org](mailto:jenifer@wiiin.org) and Alison Thompson—[alison@wiiin.org](mailto:alison@wiiin.org).

WIIIN also has a new mailing address and phone number so please update your records:

**Women in Institutional Investments Network (WIIIN)**  
**1540 River Park Drive, Suite 211**  
**Sacramento, CA 95815-4608**  
**916-333-3280**  
[info@wiiin.org](mailto:info@wiiin.org)

As mentioned, the Board implemented a Conflicts of Interest and Marketing Policy, along with the following Community Guidelines:

- **The WIIIN Community is aligned in our mission and vision to strengthen relationships and advance and empower our community of women. In order to foster a safe and inclusive environment, we ask our members to adhere to the following guidelines.**
- **All members are expected to conduct themselves in a respectful manner while interacting with others.**
- **Direct or indirect marketing of products or services is not in the spirit of our educational gatherings and is explicitly prohibited.**
- **WIIIN distribution lists are not to be used for solicitations or mass mailings.**
- **WIIIN will not promote or post RFPs for sponsors or members, or otherwise promote for-profit opportunities for for-profit entities.**
- **Members and guests in violation of this policy may be denied membership or attendance at future events. [Click here to read our full Conflicts of Interest and Marketing Policy.](#)**

Both the Conflicts of Interest and Marketing Policy and Community Guidelines can be found on our website: <https://wiiin.org/WIIIN-Community-Guidelines>. We encourage our members and sponsors to familiarize themselves with our guidelines.

Finally, WIIIN is proud to announce we have added a “Resource Center” to our website: <https://wiiin.org/resource-center>. The Resource Center will allow our sponsors, members, peer industry organizations, and third parties that WIIIN has partnered with on programming, to post links, resources and information on their businesses. The Board agreed it is important for our members to have a link to the resources we gain through our educational and personal development programming, and are excited to provide that link through [www.wiiin.org](http://www.wiiin.org).

## PROGRAMMING RECAP AND UPCOMING EVENTS

### PROGRAMMING RECAP

#### Wellness Series

WIIIN would like to thank our community for growing with us as we expand our programming. As the pandemic has brought many changes to all our lives, with the help of Zoom, it gave WIIIN the opportunity to focus on health and personal development. We started the year with our wellness series “New Year, Lets Get Healthy Together”, which included two events featuring certified Nutritionist Katie Bressack and Certified Aromatherapist, Jessica Klingbaum. On January 7, WIIIN members engaged with Katie Bressack to discover how sugar, stress and lack of sleep affecting your health. The discussion was focused on simple yet effective steps we can take to increase energy levels, maintain a more balanced mood, reduce cravings and think more clearly. On February 10, WIIIN members engaged with Jessica Klingbaum, for a fun, informative and interactive workshop, focused on essential oils and aromatherapy. WIIIN thanks Katie and Jessica for their participation, as we received very positive feedback from our members on both sessions, and will continue to pursue health-focused events for our members going forward. Please see the Resource Center on our website for further information.

#### Career Series

WIIIN offered a 3-part career series in the Spring in collaboration with Inside Out Incubator and Career Coach, Tracy Podell. Alicia Jabbar and Gina Restani from Inside Out kicked off the series with an hour and a half session entitled “How to Break the Rules and Level Up Your Career” teasing out the norms we ascribe to without scrutiny and challenging us to break free from those that do not serve us. The second session was “Quieting the Voice of your Inner Critic” where participants found a safe space to acknowledge their own saboteur and found strength and ideas from the group on how to disengage their negative voice. In the last session, Tracy Podell worked members through a very practical and immediately actionable 5-year career planning framework. We had some members engage in all three, others in just one or two, and received very positive feedback overall. Please see the Resource Center on our website for further information.

## Private Markets & the Pandemic: Impact and Implications

On April 22, WIIN held our second flagship event of 2021, focused on Private Markets and the Pandemic. The event took place on the Remo platform and featured an interactive panel of four influential women: Mary Bates (Meketa), Robin Potts (Canyon Partners), Tanya Kemp (SFERS) and (moderated by) Esme del Bosque (LACERA). The discussion focused on how the global pandemic has impacted the private market investment landscape and was followed by virtual networking. We thank Mary, Robin, Tanya and Esme for their expertise and participation. The event was well received by the community and the discussion relevant and timely.

## Annual Luncheon: Listening Louder, Creating an Inclusive Company Culture

WIIN held our fifth Annual (Virtual) Luncheon on June 23 using the Remo platform, a fire-side chat focused on creating an inclusive company culture. The discussion featured Shelly Heier (President, Senior Consultant and Leader of the Institutional Investing Diversity Cooperative at Verus Investments and Susan Long-Walsh (Senior Practice Leader, DE&I Initiatives T-Mobile and a Coach and Talent Recruiter for top corporations). Together they covered a wide-range of topics on inclusive behavior in the work place, focused on race, disability, gender and sexual identity. WIIN was thrilled to honor Betsy Berkheimer-Credaire, Chief Executive Officer, 50/50 Women on Boards for her tireless work on advocating for women and

accelerating gender balance and diversity on corporate boards. WIIN thanks the over 240 attendees who participated and our sponsors and members for your continued support. Our *FIFTH* Annual Luncheon is a milestone for the organization and we are grateful to celebrate with our community.

## UPCOMING EVENTS FOR FALL 2021

As we move back into in-person events, WIIN is excited to announce we plan to hold members-only Happy Hour in mid-August. We are monitoring the changing LA County COVID guidelines as we see a resurgence in cases in the area. We are excited to see friends and colleagues again in person and hope this event can take place. Please keep your eye out for the event invite, location and time.

In addition, WIIN is working on a Board Resume workshop planned for the end of October, and a fireside chat with Roz Hewsinian, Chief Investment Officer of the Helmsley Charitable Trust, via Zoom at the end of November. Please keep your eye out for save the dates and event invites.

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. 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 UPDATE

As previously communicated, WIIN is offering fully sponsored 1-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 share the application (<https://www.surveymonkey.com/r/SDKQSQ2>) with any college women who may be interested, and please reach out to the head of our Philanthropy Committee, Carrie-Ann Stepien ([carrie-ann@wiin.org](mailto:carrie-ann@wiin.org)) 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, and encourage our members to reach out to Carrie-Ann with any ideas to further support this effort.

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.

## LOCAL EVENTS

- WIIN is proud to share the invitation to join **Accelerate Investors** on **July 28–29** for the **Women Investment Leaders Symposium** to learn what's on top of mind for leading investors! The virtual symposium will feature Networking Sessions, a Business Development Best Practices Workshop, and Panel Discussions + Q&A on private equity, venture capital, real estate, leadership, etc.
- See list of confirmed speakers: <https://accelerateinvestorsny.com/accelwomen>
- Register now: <https://bit.ly/accelwomen21>
- For questions, email: [hello@accelerateinvestorsny.com](mailto:hello@accelerateinvestorsny.com)

Accelerate Investors  
WOMEN INVESTMENT LEADERS  
July 28 - 29 | #accelwomen SYMPOSIUM

Joe Bryant  
M&A Investment Company

Angela Miller-May  
Co-founder, The Women's Fund

Elizabeth Govea  
Investment Bank

Geeta Kapadia  
Vice President, Health

Allison Romano  
Partner, Equity Analyst

CLEARIAKE TPG VISTRIA  
Ninety One CapitalDynamics  
accelerateinvestorsny.com/accelwomen

## LOCAL EVENTS (cont'd.)

- WIIN is proud to share an invitation to **100 Women in Finance's 2021 Global FundWomen Week Conference**, taking place **September 20–24**. This free, virtual, global capital introduction event connected 200 female fund managers and 450 allocators for 1,000+ meetings in 2020. Registration is now open for qualified allocators and female fund managers: <https://app.icconnections.io/Event/Registration/FundWomenWeek2021>. Learn more about the conference here: <https://fundwomenweek.100women.org>

## LIFESTYLE & ENTERTAINMENT

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

### BOOKS

- **The Alice Network** - Kate Quinn
- **Lost Children Archive** - Valeria Luiselli
- **We Keep the Dead Close: A Murder at Harvard and a Half Century of Silence** - Becky Cooper
- **Crying in H Mart** - Michelle Zauner
- **Think Again: The Power of Knowing What You Don't Know** - Adam Grant

### TV & MOVIES

- Mare of Easttown
- WandaVision
- The Crown
- Black Widow

### APPS & LIFEHACKS

- Sleep Cycle
- MasterClass
- Libby

## JOB BULLETIN / CAREER OPPORTUNITIES

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://wiiin.org/Monthly-Job-Bulletin>.

## GET INVOLVED WITH WIIN

WIIN's is currently looking for members to volunteer and join our **Finance 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, Jenifer MacDonald at [info@wiiin.org](mailto:info@wiiin.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. **Mackay Shields** has expanded their involvement by becoming a Diamond Sponsor, **Wilshire Associates** has expanded their commitment by becoming a Gold Sponsor, **Harbourvest** has joined as a Gold Sponsor, and **Post Advisory Group, Vontobel Asset Management**, and **Segall Bryant & Hamill** have joined as Silver Sponsors. Please contact Chaunce Wilks, co-chair of WIIN's sponsorship committee, at [chaunce@wiiin.org](mailto:chaunce@wiiin.org) for more information. Thanks again to our new, renewing and current sponsors for your continued support: <http://wiiin.org/Sponsors>.



**WIIN is on INSTAGRAM!**  
[@wiiinla](https://www.instagram.com/wiiinla)

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

# SPONSORS

PLATINUM



DIAMOND



GOLD



SILVER



[www.wiin.org](http://www.wiin.org) | [LinkedIn](#) | [Instagram](#)