COLLABORATIVE WOMEN IN INVESTMENT MANAGEMENT (WIM) INITIATIVE

A Partnership To Further The CFA Institute WIM Initiative
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CFA Society Indianapolis
WIM Chair, Membership Chair

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Chief Wealth Strategist
Refresh Investments LLC
CFA Society Los Angeles
Women's Member Community Co-Chair

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Equity Portfolio Manager
Northern Trust Asset Management
CFA Society Chicago
Women's Network Co-Chair

Regina Gaysina
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Municipal Finance at RBC Capital Markets
CFA Society New Mexico
Women's Advisory Committee

Victoria Prescott, CFA
Associate Director
Capital Markets & Investor Relations at Realty Income Corporation
CFA Society San Diego Advocacy Chair
COLLABORATIVE WIM INITIATIVE

WHAT

This collaboration is modeled after the CFA Institute Women In Investment Management (WIM) Initiative. CFA societies and FPA chapters around the country have joined efforts to further our shared goals of inclusion and diversity in capitalism.

This is a grassroots campaign:

· **To empower** female professionals across all facets of the finance industry
· **To support** the advancement and development of female leaders, as well as to celebrate their accomplishments
· **To establish** a broad-based community and share resources to promote our shared vision
· **To create** demand for diversity

WHY

Despite immense progress towards diversity, the reality remains that there are still relatively few women in senior leadership roles and even fewer minority women. This means that women often lack the natural mentorship and sponsorship that tends to take place at the middle and senior levels, necessitating that they work harder to establish their own support network.

Women, as the minority in the finance industry globally (regardless of country and geography), are the universal diversifier.

We see the new world of virtual programming as an opportunity—to build a broader community that is geography-agnostic, to share resources and information for the ultimate benefit of our combined member base, and to create high quality programming that celebrates the accomplishments of female leaders, while empowering each of our members in their personal career journey.

Our initial goal with this collaboration is:

· **To create** a unique program series that provides exceptional professional development guidance and showcases talented, accomplished female leaders in the finance industry;
· **To co-market** high quality programming of the participants of this collaboration, in the same vein
· **To offer** valuable networking opportunities for our member base

Elevating and showcasing talented, accomplished women has a powerful impact on the diversity dialogue. To see that women from all backgrounds and cultures can and do succeed at the highest levels of finance can be both empowering to other female professionals and inspiring to those who come after us. We hope that this initiative will help to inspire young female professionals to shoot for the highest positions of leadership within their organizations.
Establishing a support network is critical to career success and perhaps more important than ever as many of us adjust to a virtual work environment. This collaboration will enable enhanced networking opportunities at all levels and facilitate the formation of a peer support system for members.

**WHO**

The collaboration has expanded to include over 20 societies across the country, with a combined member base exceeding 22,000 and growing. The full list of participants follows.

<table>
<thead>
<tr>
<th>CFA Society</th>
<th>Member Base</th>
<th>Female Members</th>
<th>% Female</th>
</tr>
</thead>
<tbody>
<tr>
<td>1    Atlanta</td>
<td>1,355</td>
<td>230</td>
<td>17%</td>
</tr>
<tr>
<td>2    Austin</td>
<td>568</td>
<td>69</td>
<td>12%</td>
</tr>
<tr>
<td>3    Chicago</td>
<td>4,643</td>
<td>696</td>
<td>15%</td>
</tr>
<tr>
<td>4    Cleveland</td>
<td>459</td>
<td>55</td>
<td>12%</td>
</tr>
<tr>
<td>5    Hawaii</td>
<td>72</td>
<td>14</td>
<td>19%</td>
</tr>
<tr>
<td>6    Indianapolis</td>
<td>348</td>
<td>31</td>
<td>9%</td>
</tr>
<tr>
<td>7    Los Angeles</td>
<td>2,372</td>
<td>427</td>
<td>18%</td>
</tr>
<tr>
<td>8    Minnesota</td>
<td>1,284</td>
<td>167</td>
<td>13%</td>
</tr>
<tr>
<td>9    New Mexico</td>
<td>107</td>
<td>20</td>
<td>19%</td>
</tr>
<tr>
<td>10   Oklahoma</td>
<td>189</td>
<td>21</td>
<td>11%</td>
</tr>
<tr>
<td>11   Orange County</td>
<td>675</td>
<td>108</td>
<td>16%</td>
</tr>
<tr>
<td>12   Orlando</td>
<td>215</td>
<td>19</td>
<td>9%</td>
</tr>
<tr>
<td>13   Phoenix</td>
<td>455</td>
<td>41</td>
<td>9%</td>
</tr>
<tr>
<td>14   Portland</td>
<td>474</td>
<td>81</td>
<td>17%</td>
</tr>
<tr>
<td>15   San Diego</td>
<td>534</td>
<td>80</td>
<td>15%</td>
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<tr>
<td>16   San Francisco</td>
<td>2,859</td>
<td>658</td>
<td>23%</td>
</tr>
<tr>
<td>17   Seattle</td>
<td>1,045</td>
<td>219</td>
<td>21%</td>
</tr>
<tr>
<td>18   Switzerland</td>
<td>2,909</td>
<td>465</td>
<td>16%</td>
</tr>
<tr>
<td><strong>CFA Society Member Base</strong></td>
<td><strong>20,563</strong></td>
<td><strong>3,401</strong></td>
<td><strong>17%</strong></td>
</tr>
<tr>
<td>19   FPA Austin</td>
<td>208</td>
<td>53</td>
<td>25%</td>
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<tr>
<td>20   FPA Indianapolis</td>
<td>358</td>
<td>105</td>
<td>29%</td>
</tr>
<tr>
<td>21   FPA Los Angeles</td>
<td>251</td>
<td>79</td>
<td>31%</td>
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<tr>
<td>22   FPA Orange County</td>
<td>500</td>
<td>150</td>
<td>30%</td>
</tr>
<tr>
<td>23   FPA San Diego</td>
<td>312</td>
<td>77</td>
<td>25%</td>
</tr>
<tr>
<td><strong>Total Member Base</strong></td>
<td><strong>22,192</strong></td>
<td><strong>3,865</strong></td>
<td><strong>17%</strong></td>
</tr>
</tbody>
</table>
Our inaugural collaborative event on September 29, 2020 (hosted by the Women's Network of CFA Society Chicago) was the first in a series of programs designed to celebrate female leaders and inspire young professionals.

Nearly 200 CFA Society and FPA members joined us for a candid conversation with Stephanie Cohen, Chief Strategy Officer of Goldman Sachs.

Just earlier in the day, Goldman announced that Stephanie would co-run the bank’s consumer banking and wealth management practice, marking the first time in years that a woman will run a major division. In addition to being the youngest member of the firm’s management committee, this move also designates Stephanie as a possible successor for the CEO role.

Stephanie shared with us everything from her reflections on her early days in Chicago as a competitive figure skater, to her most memorable investment banking deals, to her enthusiasm for the GS Accelerate and Launch with GS programs as platforms to foster innovation and diversity--and the importance of establishing a personal board of directors in our respective career journeys.

Thank you for helping us to celebrate this incredible female leader.
COLLABORATIVE WIM PROGRAM SERIES

The Collaborative WIM program series includes events on:

- "M&A and the COVID-19 Impact: Crisis or Opportunity?" with Stephanie Cohen, Chief Strategy Officer of Goldman Sachs (hosted by CFA Society Chicago on 29 September 2020)

- "Gender Gap Investing" with Nannette Hechler-Fayd'herbe, Chief Investment Officer of International Wealth Management and Global Head of Economics & Research of Credit Suisse (hosted by CFA Society Switzerland on 3 December 2020)

- "Hack Your Own Brain" with Dr. Karolien Notebaert, Founder of One-Step Ahead, Notebaert Consulting (hosted by CFA Society Indianapolis on 12 January 2021)

- "The 10 Marketing Tools You Never Knew You've Always Needed" with Sheryl Hickerson, CEO, Females and Finance (hosted by FPA Austin on 12 January 2021)


- "Break Free from Imposter Syndrome: Embrace Your Confident, Capable Self" with Michelle Galloway, Of Counsel at Cooley (hosted by CFA Society Indianapolis on 3 February 2021)

- "The Myth of Fearlessness" with Mary Poffenroth, STEM Faculty at San Jose University (hosted by CFA Society Los Angeles on 6 May 2021)

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