



Women's Leadership  
Alliance



## Changing the Conversation Donor Report 2018 and WLA Update

Dear Friends and Colleagues,

2018 saw the advancement of the Women's Leadership Alliance's (WLA) mission to attract, develop and engage the most promising women leaders in order to grow and strengthen the financial advisory profession to better represent the diverse community we serve.

The WLA was launched in 2016 and achieved 501c3 nonprofit status in February 2017. The organization was founded by a group of senior RJ women advisors and initially launched to work with all divisions of Raymond James. Over the past two years, we have expanded our board to include geographically diverse representation from all the firm's broker/dealers. We are now poised to expand beyond our beginnings and invite representation from various national industry organizations and affiliations.

WLA's executive director is Michelle Danielson who is home based in the Tampa Bay area of Florida. Current Officers and Board members are:

Kalita Blessing - President  
Judith McGee - Vice President, Secretary  
Tracy Vaughn - Vice President, Treasurer  
Kimberlee Bouska - Vice President  
Mary Carter - Vice President  
Kathleen Miller - Vice President  
Danielle Page - Vice President  
Sherri Stephens - Vice President  
Margaret Starner - Vice President



Our first two years were spent building, staffing and funding the WLA to assure long-term sustainability and economic health. We launched our initial WLA's Leadership Initiative mentor/mentee programs involving our Raymond James family to test the viability and success of our innovative concepts before taking them nationally.

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We wish to recognize and thank our mentee and mentors who participated in the pilot of our groundbreaking program:

Tara Bobelak  
Ilona Box  
Shelly Church  
Stacey Cushwa  
Linette Dobbins  
Pamela Grey

Diane Guffey  
Janice Henderson  
Melissa Joy  
Alexa Kane  
Kate Kooman Starkey  
Karri MacLuer  
Mary Zastrow

Katherine O'Leary  
Alexandra Rice  
Traci Richmond  
Lisa Walsh  
Donna Walton  
Ashley Warne

We just passed the halfway point in the initial rollout of the full program. One significant enhancement implemented was the delivery of joint training to both mentor and mentee participants just ahead of the 2018 RJ Women's Symposium (we provided in person training to the mentors only during the pilot). Current mentees applauded the addition of this in person training stating, "meeting my mentor in person and getting to know each other really let us hit the ground running", and "it was nice to be able to meet with the other mentees in the program, it provided structure for the long-distance relationships". Other feedback we've received from current program enrollees.... "I just wrapped up my first call with my mentor, it really is more than I expected it to be" and "sometimes I am standing too close to the issue and can't see the full picture, this is how my mentor adds value."

We will continue to report significant outcomes to mentee participants and their teams in the future!



## Education & Communication

WLA's goal is to create comprehensive resources for women who are interested in learning more about the financial advisory profession. Please check out our Website [www.womensleadalliance.org](http://www.womensleadalliance.org) designed by **Idea Decanter**. We want a site where a woman can ask "what" does a financial planner do, "why" do they do it, and "how" can I get started if I'm interested? Where are the pathways to join and/or advance in the profession?

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We've established a social media presence on LinkedIn and are keeping our donors and supporters up to date through postings as well as monthly newsletters. WLA offers our "Ted Talk" style presentation and accompanying script for those interested in speaking about the profession in their local communities. This is available to everyone at no cost through the WLA's website. WLA's '2.0' version of this presentation focuses specifically on college aged women.

Another major enhancement is our ever-growing collection of videos featuring members of the "WLA Nation" who share their own stories of how they found to the career (and one account of 'how financial planning found her!').

## Sally Law Tribute

2018 also brought some sadness to the WLA – we lost a dear friend and tireless supporter, Sally Law. Sally was a pioneer in the field and had many friends across both the firm and the industry. We dearly miss her but are grateful to have received many donations to the Sally Law Memorial Fund from over 30 of her friends and supporters. We will be spending time this year carefully considering how to most appropriately honor Sally's memory and commitment to the WLA through the use of these funds.



Speaking of the financial status of the WLA, we are pleased to report we have raised just shy of \$800,000 in pledges and funds collected from over 140 individual and corporate supporters. Your support and continued commitment to the WLA's mission is truly appreciated – we could not continue this important work without you!

What's next for us? We are currently working to hone our strategy to ensure our programs and activities continue to effectively support our mission. We are actively taking steps to expand the reach of our efforts beyond Raymond James to become a force for change in the industry. We look forward to sharing our plans for 2019 and beyond at the RJFS National Conference (Las Vegas – April), as well as the RJA Summer Development (July – Orlando) and the RJ Women's Symposium (September – Orlando). Please continue to visit our website, [www.womensleadalliance.org](http://www.womensleadalliance.org), as we are continually expanding and enhancing its content.

Again, thank you for your continued support of our efforts. Together, we can **Change the Conversation** and make the achievement of this vital mission possible!

Please direct any questions or comments to: Michelle Danielson at [michelle@womensleadalliance.org](mailto:michelle@womensleadalliance.org).