



**Women in Financial Markets**  
**Leadership Committee Update Report**  
**June 5, 2025**

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| <b>2025 Committee Goals</b><br><i>(including metric(s) to achieve by year end)</i>       |
| 1. All cohorts organized and meet at least 6 times during 2025                           |
| 2. Wolfpacks and mentorships filled by January and at least 2 check ins for each in 2025 |
| 3. WIFM conference in May 2025, featuring WIFM priorities and mission                    |

### **1. Key Activities**

*Summarize major initiatives and updates since the last meeting:*

- All cohorts are meeting routinely and we have received positive feedback from many participants.

The 2025 conference occurred on May 21 and sold out over 2 weeks in advance with around 150 attendees.

### **2. Progress & Impact**

*Provide concise updates on goals and outcomes:*

- Progress: Conference complete.
- Impact Metrics: Survey results are overwhelmingly positive, especially regarding sessions and networking.

### **3. Challenges & Opportunities**

*Briefly outline:*

- Challenges: We should find a bigger space for next year, provide more breaks, better backdrop for session, water on tables, potential for headshots perhaps.
- Opportunities: 1) Continue marketing post-event through website, gala, etc. 2) Follow up with speakers and attendees for sponsorship while conference is fresh.

### **4. Support Needed from the Board**

*Specify what is required from the board including any decisions needed:*

- Good opportunity for board to focus on conference attendees for sponsorship.

**Women in Financial Markets**  
**Events Committee Update Report**  
**Date: June 2025**

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| <b>2025 Committee Goals</b><br><i>(including metric(s) to achieve by year end)</i> |
| <b>1. 15 events – Americas &amp; APAC (including sponsor benefits)</b>             |
| <b>2. Reduce no-show rate</b>  |
| <b>3. Expand in new geographic locations</b>                                       |

**EXECUTIVE SUMMARY**

- **Progress to Date:** 9 of 15 planned events completed (60% of annual goal)
- **Attendance Metrics:** Current attendance rate averaging 66% across all events
- **Geographic Expansion:** Hosted events in 6 cities (not including UK / EU) – NY, Boston, DC, Orlando, Hong Kong, Singapore
- **Key Challenges:** 34% no-show rate; 5 sponsors with uncommitted marquee events

**1. KEY ACTIVITIES**

**SUCCESSFULLY COMPLETED EVENTS**

- **February 12, Orlando - Cleary Sponsored Lunch**
  - Event: FIA/SIFMA Asset Management Derivatives Forum & WIFM Washington Update
  - Registrations: 115
  - Attendees: 95
  - Show rate: 83% -- excellent
- **March, Virtual - Women's History Month Series**
  - Format: 3 sessions featuring WIFM award winners and shortlisted individuals
  - Total registrants: 511 versus 312 in 2024 (across 4 events)
  - Total attendees: 294 versus 171 in 2024 (across 4 events)
  - YoY attendance: increase of approximately 129%
- **March 5, DC - Cleary Sponsored Event**
  - Event: Navigating Change: Financial Services Under the New Administration
  - Registrations: 80
  - Attendees: 44
  - Show rate: 55%

- **March 7, New York – New York Stock Exchange Closing Bell**
  
- **March 24, Boston - JP Morgan Sponsored Event**
  - Event: Empowerment: Leadership and Self Advocacy
  - Registrations: 100
  - Attendees: 59
  - Show rate: 59%
  
- **March 25, New York - Deutsche Bank Speed Networking Event**
  - Registrations: 141
  - Attendees: 100
  - Show rate: 71%
  - Note: DB expressed interest in hosting additional summer events
  
- **March 27, Hong Kong - Jefferies**
  - Event: Building Networks & Elevating Excellence: Female Trailblazers in Finance & Corporates
  - Registrations: 44
  - Attendees: Unknown
  
- **April 3, New York - S&P Marquee Event**
  - Event: GenAI Discussion with Hina Shamsi (CTO, Morgan Stanley)
  - Registrations: 129
  - Attendees: 64
  - Show rate: 50%
  - Note: Excellent feedback on speaker quality
  
- **April 22, Singapore**
  - Event: Leading Through Disruption and Change
  - Registrations: 99
  - Attendees: 75 from 43 companies
  - Show rate: 76%

#### **EVENT PLANNING IN-PROGRESS**

- *June 5, New York - Options Group Marquee Event*
- *June 17, LA – TCW Marquee Event*
- *June 16-18, London - LSEG IDX Breakfast – Marquee Event*

- June/July/August, Virtual - Summer Leadership Series
- September TBD, New York - DTCC Marquee Event
- September 25, New York - Capital Group Marquee Event
- October TBD, Chicago - CME Group Marquee Event
- November 12, Nomura – conversations for event in NY
- Date TBD, Bloomberg – conversations for event in Houston

### SPONSORS WITH UNCOMMITTED MARQUEE EVENTS

- Bank of America
- ICE

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## 2. PROGRESS & IMPACT

- **Event Calendar:** 9 completed events with 9 more in active planning process
- **Attendance Rate:** Averaging 66% attendance across all events, below ideal target of 75%
- **Geographic Expansion:** Successfully hosted events in NY, Boston, DC, Orlando, Hong Kong and Singapore with plans for Chicago, and Houston.

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## 3. CHALLENGES & OPPORTUNITIES

### Challenges

- **Sponsor Engagement:** 2 sponsors have not confirmed their marquee event, placing Q3-Q4 at greater risk of calendar congestion
- **Attendance Reliability:** Despite reminder emails and attendance policy notices, no-show rates remain at approximately 34%

### Opportunities

- **Analytics Development:** Enhance data collection at events to better understand member preferences and engagement drivers via real-time survey.

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## 4. SUPPORT NEEDED FROM THE BOARD

### Sponsor Engagement

- Request: Confirm Bank of America and ICE interest for marquee event and lock in dates for events still in planning phase.

### Attendance Policy

- Implement new attendance policy including: 3-strike system for no-shows (automatically placing them on the waitlist upon registration) and priority registration for reliable attendees.

**Women in Financial Markets**  
**Finance Committee Update Report**  
**Date: 6/2/25**

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| <b>2025 Committee Goals</b><br><i>(including metric(s) to achieve by year end)</i>   |
| 4. Work closely with the Sponsorship Committee to align on fundraising goals and collect sponsorship funds in a timely manner<br>a. Target: Minimum: \$610K; Stretch Goal: \$825K  |
| 5. Propose and maintain oversight of budget and finances for WIFM. Work collaboratively with other Committees to support their financial needs<br>a. At a minimum meet budgeted revenue of \$644K & come in at or under the \$1.1mn expense budget |
| 6. Complete annual tax filings and maintain not-for-profit status<br>a. Submit State of Delaware annual filing by March 1st<br>b. Submit IRS 990 and NYS tax filings by November 15  |

### 1. Key Activities

*Summarize major initiatives and updates since the last meeting:*

- Received payments from five of the 23 2025 gala sponsors totalling \$80K. Total outstanding to date is \$350K.
  - Continuing to work on collecting the 2024 Barclays gala sponsorship money (\$20K).
  - WIFM Conference revenue totaled \$14.6K exceeding budget by 22%; related costs of \$26.2K came in 48% under budget; net event loss was \$11,6K vs expected loss of \$38K; last year's net conference loss was \$10.4K.

### 2. Progress & Impact

*Provide concise updates on goals and outcomes:*

- Progress:
  - Cash on hand as of May 31 is 769K; May YTD expenses totaled \$318K which is 28% to full-year budget; YTD Net Income is a loss of \$191K.
- Impact Metrics:
  - Current cash on hand net of reserves is sufficient to cover ~95% of remaining budgeted expense and outstanding 2024 payables.
  - 2025 Gala sponsorship commitments to date total \$430K from 23 sponsors.

### 3. Challenges & Opportunities

- Challenges:
    - Shortening the time between sponsorship commitment and receipt of funds to minimize use of reserves needed to cover our payment obligations.
    - Properly setting up our platform to accept foreign funds from potential sponsors and /or members. Looking for legal counsel assistance.
  - Opportunities:
    - Explore opportunities to diversify sources of revenue (e.g. membership fees)
- 4. Support Needed from the Board**
- Assistance on the challenges noted above.

**Women in Financial Markets**  
**EU Committee Update Report**  
 Date: June 5, 2025

| <b>2025 Committee Goals</b><br><i>(including metric(s) to achieve by year end)</i>   |
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| <b>1. <u>Events/Leadership</u></b><br>EU Gala for 160 guests in November 2025<br>Attend 6 Conferences (one of which in Paris)<br>Host 2 Flagship Events (one of which in Paris)<br>Host 4 General Events, coordinate with Sponsorship/Leadership<br>Synch with global cttee to connect programming locally |
| <b>2. <u>Membership/Sponsorship</u></b><br>Actively manage/engage with Sponsors with EU/UK presence<br>Grow the membership, focusing specifically growth in Paris  |
| <b>3. <u>EU Working Group/Nomination Committee</u></b><br>Strengthen EU WG<br>Add EU Ambassadors/EU Board Member Options for Nom Cttee   |

**1. Key Activities**

*Summarize major initiatives and updates since the last meeting:*

- [Highlight key activities or programs.]

**Completed Events:**

- **Derivatives Forum Networking Breakfast & Fireside Chat in Frankfurt – Feb 26**
- **Derivatives Forum Inaugural German Dinner in Frankfurt – Feb 25**

- **LSEG Market Close Ceremony to celebrate Women's History Month** – March 19  
This marked WIFMs first time participating in the LSEG Market Close.
- **ISDA AGM Panel in Amsterdam** – May 14

#### **Upcoming Events:**

- **Marex x WIFM Wolfpack Event in London** – Jun 5
- **FIA IDX Breakfast in London** – Jun 17
- **Leadership Webinar with Cambridge Judge Business School** – Jun 20
- **Jefferies Breakfast Event in London** – Jul 3
- **SocGen Event in Paris** – H1 TBC
- **BNPP Event in London** – Sept TBC
- **TradeTech FX in Barcelona** – Sept 16
- **JPMAM Event in London** – Oct 2
- **Fixed Income Leaders Summit (FILS) in Amsterdam** – Oct 15
- **Bloomberg Event in London** – Oct 15
- **ING Event in Amsterdam** – Oct TBC
- **EU Gala in London** – Nov 12

## **2. Progress & Impact**

*Provide concise updates on goals and outcomes:*

- **Progress:** [Summarize progress on key goals achieved since last meeting.]
- **Impact Metrics:** [Include participation numbers, testimonials, or relevant data.]

#### **Events**

- **20** senior women in attendance for the Derivatives Forum Inaugural German Dinner
- **40** women in attendance for the LSEG Market Close Ceremony
- **200** RSVPs for the upcoming Marex x WIFM Wolfpack Event
- **100** RSVPs for the upcoming FIA IDX Breakfast

#### **Membership**

- **1,320** members in EMEA
  - **105** new members were added in Q1

#### **2025 Programming**

- Out of 503 women in the **Wolfpack Program**, 115 total are based in the EU/UK (representing 23%)
- Out of 182 women in the **Mentorship Program**, 36 total are based in the EU/UK (representing 20%)

- Out of 102 women participating in our **Leadership Cohorts**, 16 are based in the EU/UK (representing 16%)

### **3. Challenges & Opportunities**

*Briefly outline:*

- Challenges:
  - Lack of Committee/Working Group support in Paris
  - Lack of events in Paris
  - Full event schedule in October/H2
  - Rigour/Key person risk in the European WG and Ctte
  - Fundraising Backdrop/Global vs Local investments into WIFM
  - Temporary time constraints on 1 EU Board Member (Susi de Verdelon)
- Opportunities:
  - Add 2 WG members based in Paris
  - Identify and partner with 5 additional woman's networks
  - Actively manage and engage with Sponsors who have EU/UK presence (candidates identified from 2025 list)
  - Identify and agree bespoke EU/UK events for Platinum/Gold Sponsors

### **4. Support Needed from the Board**

*Specify what is required from the board including any decisions needed:*

- We are securing a keynote speaker for the EU Gala on Nov 12. An ask was made to Francine Lacqua from Bloomberg.