



2025 WIFM Goals and Metrics

Connect, Elevate and Advance - Core to the WIFM mission is to create opportunities for our members to connect with each other, learn about key industry initiatives while developing as leaders, and expand their professional networks. The primary way we help our members connect is through our in-person and virtual events held throughout the year. We create awareness for WIFM and our events via LinkedIn and our website. We host development programs to provide opportunities for women to build skills and advance in their careers.

2025 Goals for WIFM:

1. Increase WIFM membership base by 12% to 9K global members and grow WIFM member participation by 15% at our events in 2025
2. Grow our LinkedIn followers to over 13k+ followers in 2025 and successfully launch our new website. Leveraging Google Analytics, identify where our members are most engaging with our online content and adjust content to help our membership and sponsorship support grow.
3. Leverage AI plus recruit a volunteer member/student (with the right skill level) to help generate content and frequency of our engagement.
4. Plan and successfully execute US and EU galas to raise funds to support WIFM mission exceeding the budgeted base case of \$600k with a stretch goal of \$850k.
5. Host a minimum of 25 in-person and virtual events including a WIFM conference in 2025 that drives connection opportunities for our members, increases awareness for our key sponsors, and helps to diversify our membership base outside of the the US and outside of NYC area (evaluate our success by increasing attendance at events and attendee satisfaction via surveys with a goal of establishing some baseline metrics in 2025.)
6. Expand the participation and impact of our programming to 700 WIFM members, which includes our 3 co-hort leadership programs, ally program, wolfpacks, mentoring and scholarship efforts.
7. Drive financial sustainability for WIFM by engaging with existing and new sponsors and efficiently using our resources to fund further growth.
8. Grow the WIFM board to 20 board members. Include 2 additional women to the WIFM Advisory Council.

WIFM Goals in 2025	2025 Target	% Growth over 2024	2024 Actual
1) Grow WIFM Membership Growth and Event Participation for Members	9K member target and 1K (15% of our members attend a WIFM event)	15%	8K members and 886 (11% of WIFM members attended an event)
2) Increase LinkedIn Followers	13K	30%	9K
3) Exceed our Fundraising Goals and Host Successful Galas in US and EU	\$600k (base case) & \$825K (stretch)	1.3% over base case (-0.03% in stretch)	Gala 2024 budget was \$592K/Actual was \$854K)
4) Connect WIFM Members through our Events and Diversify our Presence	25 Events	9%	23
5) Expand the Scale and Impact of our Programming for our Members	700 participants	35%	520 in cohorts, Ally, Wolfpacks and Mentoring Programs in 2024
6) Meet our base case budget and driving towards future growth	\$644K income and \$1.1M expenses	Exceeding budgeted revenue by 45% and under on expenses by 16%	\$1.6 M in available funds at year end with \$300K set aside in reserves
7) Grow WIFM Board & Advisory Council	20 Board Members & 9 Advisory Council	11% & 29%	18 Board Members & 7 Advisory Council

APPENDIX:

Connect Stats

- **What % of our members registered for a WIFM event in 2024?**
 - **11%** (886 members)*
 - *since transitioning to the CRM for event registration in June 2024
- **How many events did we host in 2024 vs 2023?**
 - **2024**

- 16 in-person
 - 7 virtual
- 2023
 - 12 in-person
 - 7 virtual
- **What were our most successful events in 2024? (Outside of the Gala and conference)**
 - Asset Management Derivatives Forum - WIFM Washington Update in Laguna
 - Treasury Clearing: Market Structure Impact and Path to Readiness in NYC
 - Boston events
 - EU Gala in London
- **What website analytics do we have, and are we seeing an increase in traffic?**
 - We will have Google Analytics on our new website.
- **What LinkedIn analytics do we have, and are we seeing an increase in traffic?**
 - 9,000+ followers YTD, a 50% increase from 6,000 followers at the end of 2023
 - Over 300,000 organic impressions in 2024
- **How many new members have we added? Where are we seeing the greatest growth?**
 - ~8,000 global members YTD, a 33% increase from 6,000 members at the end of 2023
 - 532 new members in the last 3 months (majority from the US, followed by the UK, with 32 new APAC members)
- **Current Global Distribution**
 - 4202 in the United States
 - 3098 in the Tri-State Area (NY, NJ, CT)
 - 191 in Boston
 - 1850 in Europe
 - 94 in APAC
 - 1945 Other/Unknown

Elevate Stats

- **How many WIFM members have updated their profile with us in the last 12 months?**
 - The email “WIFM Announcement - CRM & Update Contact Info” received a 35.84% open rate.
 - The self-service page received over 4000 views. We are unable to track which members have made updates.
- **Have we received any success stories about jobs being filled through our job postings or whisper network?**

Advance

- **What was the growth in our programming in 2024 vs 2023?**
 - **Cohort Programs (Emerge, RS, and TB)**
 - 2024- 95 women
 - 2023- 91 women
 - **Ally Program**
 - Cohort 1- 14 men

- Cohort 2- 17 men
- **Wolfpack Program**
 - 2024- 305 in 40 Wolfpacks
 - 2023- 235 in 33 Wolfpacks
- **Mentorship Program**
 - 2024- 106 women
- **Scholarships**
 - 2024- 99 applications, 15 winners
 - 2023- 30 applications, 20 winners

2025 Outlook

- **What does our programming look like for 2025?**
 - **Cohort Programs**
 - 102 cohort members
 - **Wolfpack Program**
 - 488 women total
 - **Mentorship Program**
 - 91 Matches
 - **Sponsor Hosted Events**
 - 11 marquee events (including S&P)