

# Finance & Fundraising Committee

## Committee Members

Co-Chairs: Karen Wares and Julie Winkler

Committee Members: Cassandra Seier, Susi De Verdalon, Margoth Pilla, Tara Dziedzic & Marisol Collazo

Goals (2021-2022 goals)	Leads	KPIs	Plan Date	Rating	Trend
Wellness Charity Fundraiser	Karen	Plan and execute a charitable fundraiser in Q1 with a goal of \$1k.	Q1 2022 - Completed		
Recruit, Hire and Onboard Head of Membership	Marisol, Cassandra	Onboard of resource in Q1	Q1 2022 - New hire started		
Plan, fundraise and host WIND Annual Gala 2022	Karen, Julie, Cassandra	Stretch goal of \$500k Gala income with \$310K as base case by attracting corporate sponsors. Estimate ~125-150 in person attendees.	Q3 2022		
Obtain Corporate Sponsors for Marquee events: DC update, Macro event, X-border derivatives update, Regulatory update	Events committee	Meet or exceed base case \$40k in fundraising to support marquee events throughout the year.	All year		
Propose and maintain oversight of budget and finances for WIND. Work collaboratively with other Committees to support their financial needs	Margoth	Meet a balanced budget for 2021-2022 year while adding full-time staff and exceeding our fundraising goals	All year		

## Executive Summary on Progress

- Update on 2022 budget to be shared at Nov Board meeting and a proposed 2023 budget
- Gala stretch goal has been exceeded with \$625,000 committed among 37 sponsors!!!
- Planning has begun for 2023 Gala including taking on the feedback from the 2022 event

## Noteworthy Items

- Detailed update on Gala to be provided at Nov Board meeting
- Need to work with Committee Chairs to further refine 2023 budget (larger expense allocation expected in 2023 includes: higher Gala expenses, Leadership programming scaling, more events (including expansion to Europe), marketing assistance and re-branding, and enhanced WIND CONNECT offering

# Communications Committee

## Committee Members (5)

Chair: Lona Mozumder

Committee Members: Tracey Jordal, Ying Cao, Cassandra Tok, Marisol Collazo, Julie Winker

Goals (2022 goals)	Leads	KPIs	Plan Date	Rating	Trend
Gala Preparation	Lona	Gala marketing, LinkedIn, Web, Email	Complete		
Women's History Month	Lona	LinkedIn engagement, Video content, Email marketing, membership engagement	Complete		
Conference partnerships	Lona	FIA, SIFMA, ISDA	Ongoing		
Scholarship Program, Wolfpack	Lona	All form submission through Formstack, LinkedIn engagement	Complete		
LinkedIn Membership Growth	Lona	Page views, Unique visitors, Followers	Ongoing		

## Progress Report:

1. Completion of successful event at NYSE with Dr. Forbes and Subadra Rajappa has been confirmed as the moderator, marketing material being worked on
2. Derivatives Masterclass with Sam Priyadarshi: We will do in person ONLY, no virtual attendees, this will now be a joint event with LSEG (platinum sponsor at gala). Need to iron out details with John Horkan at LSEG
3. FIX Trading event : First time ever with a booth

## Key projects:

- Holiday newsletter
- Scaling and updating the website
- Branding : Next big project for Digital Strategy team