

SWAT Team: DRAFT Strategy for WIND to WIFM Transition

The purpose of this strategy is help ensure that the transition from WIND to WIFM is substantively meaningful – that we don't end up with an organization that is derivative heavy despite its claim to be focused on the broader financial markets.

- **Focus:**
 - As part of its broadening footprint, WIFM would first focus on three subject areas:
 - Fintech
 - Equity Capital Markets
 - Securities / Derivatives
- **Research:**
 - Assign individual in Events Committee for each of the two new areas.
 - That individual is then responsible for researching (see Attachment A and B for initial ideas for the two new areas):
 - Key individuals;
 - Key conferences (to check their agendas for speakers and topics); and
 - Key topics.
 - That individual will also suggest which of the “key people” to sit down with in order to get a better sense of what they see happening in the industry and areas in which WIFM should lean in with programming.
- **Events:**
 - Events Committee would then use this information to set a minimum number of events per year for each of our three areas (e.g., 2-3).
- **Board Members:**
 - Nominating Committee would use the list of key individuals as part of their determinations for future board nominees.
- **Marketing:**
 - Marketing Committee would make sure that our marketing features events, individuals, topics that are in all three areas – not just derivatives.
- **Partnerships:**
 - WIFM leadership would consider if we should cross-market with some of the other conferences / groups.