



**Women in Financial Markets
Sponsorship Committee Update Report**

Date: December 8, 2025

1. 2025 Updates

- 47 Sponsors
- \$834k Gala revenue (vs our 2025 goal of \$825k)
 - \$816k sponsorship dollars

2. Deliverables

Complete

- Sent a “Don’t Miss Out on WIFM’s 2026 Annual Gala” email to sponsor contacts, 2025 Gala attendees, and EU Gala attendees asking them to take action and confirm their sponsorship for 2026 – 5 completed the interest form

Q1

- Send a survey to sponsor contacts by end of Jan
- Create a list of target firms in financial markets
- Send communication out to sponsors about 2026 gala

**Women in Financial Markets
EU Committee Update Report**

Date: December 8, 2025

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

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
- **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
- **TradeTech FX in Barcelona** – Sept 17
- **JPMAM and Women in ETFs Event in London** – Oct 2
- **Fixed Income Leaders Summit (FILS) in Amsterdam** – Oct 16
- **ING Event in Amsterdam** – Nov 11
- **EU Gala in London** – Nov 12
- **BNP Breakfast Event in London** – Dec 3

Upcoming Events:

- **Leadership Event – “Expanding What’s Possible”** – Dec 10

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 Marex x WIFM Wolfpack Event
- **100** RSVPs for the FIA IDX Breakfast
- **82** RSVPs for the Jefferies Breakfast Event
- **114** RSVPs for the JPMAM and Women in ETFs Event
- **32** RSVPs for the ING Event

- **157** attendees for the EU Gala

Membership Stats

- Q1 2025 (as of April 28): **1,241 members**
- Q2 2025 (as of June 5): **1,320 members**
- Q3 2025 (as of September 15): **1,464 members**
- Q4 2025 (as of December 3): **1,807 members**

Quarterly Growth

- Q1: **+105** new members
- Q2: **+79** new members
- Q3: **+144** new members
- Q4: **+343** new members

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: [Identify any key hurdles or risks.]
 - Lack of Committee/Working Group support in Paris
 - Lack of events in Paris - deferral to 2026
 - Full event schedule in October/H2
 - Rigour/Key person risk in the European WG
 - Fundraising Backdrop/Global vs Local investments into WIFM
 - Temporary time constraints on 1 EU Board Member (Susi de Verdalon)
- Opportunities: [Potential areas for collaboration or new areas to explore.]
 - 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:

- [Provide any specific recommendations for Board approval at next meeting, specify any resource needs, or specific feedback or questions for the Board.]

Women in Financial Markets
Finance Committee Update Report
Date: 12/1/25

<p>2025 Committee Goals <i>(including metric(s) to achieve by year end)</i></p>
<p>1. Work closely with the Sponsorship Committee to align on fundraising goals and collect sponsorship funds in a timely manner</p> <p style="padding-left: 20px;">a. Target: Minimum: \$610K; Stretch Goal: \$825K</p>
<p>2. Propose and maintain oversight of budget and finances for WIFM. Work collaboratively with other Committees to support their financial needs</p> <p style="padding-left: 20px;">a. At a minimum meet budgeted revenue of \$644K & come in at or under the \$1.1mn expense budget</p>
<p>3. Complete annual tax filings and maintain not-for-profit status</p> <p style="padding-left: 20px;">a. Submit State of Delaware annual filing by March 1st</p> <p style="padding-left: 20px;">b. Submit IRS 990 and NYS tax filings by November 15</p>

1. Key Activities

Summarize major initiatives and updates since the last meeting:

- The Finance Committee met on Nov 14 to discuss the first iteration of the 2026 which we are sharing with the full board at the December 8th meeting for review and feedback. We plan to seek final budget approval at the first Board meeting in 2026.
- Gala revenue totaled \$834K exceeding our \$825K goal but lower than 2024 (\$855K). To date we have received payments from all but 5 of the 47 gala sponsors- a big improvement from previous years.
- The current 2025 full-year forecast is showing a net revenue of \$73K rather than the budgeted loss of \$0.5K.
- Filed the 2024 Federal and NYS tax returns by the November 15th deadline. The tax accountants also performed a financial review as required by NYS and found no areas of concern.

2. Progress & Impact

Provide concise updates on goals and outcomes:

- Progress:
 - Making good progress at diversifying our revenue sources. We are set to start receiving membership fees in the U.S. and working on rolling it out internationally in 2027.
 - To date, we have received \$12.8K for the scholarship we plan to award in Cassandra’s memory.
- Impact Metrics:
 - We expect to end the year above budget in revenue by 40% and lower than budgeted expenses by 26%.

3. Challenges & Opportunities

- Challenges:
 - Continued need to shorten the time between sponsorship commitment and receipt of funds.
 - The registration requirement in the UK is temporarily halting the membership fee rollout in that region. Aiming to finalize the registration process in 2026.
- Opportunities
 - International membership fee rollout
 - Exploring additional opportunities for diversifying sources of revenue
 - Establishing a good investment strategy for our reserves

4. Support Needed from the Board

- Looking for ongoing pro-bono legal advice regarding our international expansion plans as well as investment advice for our funds in reserve.
- Need to add another Board member to the Finance Committee

Women in Financial Markets

Events Committee Update Report

Date: December 2025

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

EXECUTIVE SUMMARY

- **Progress to Date:** All planned 2025 events completed (exceeding annual goal of 15 events)
- **Geographic Expansion:** Hosted events in 9 cities - New York, Boston, Washington DC, Orlando, Hong Kong, Singapore, Los Angeles, Chicago, Houston (excludes UK / EU, reported separately)
- **Key Challenges:** Event no-show rate remains frustratingly high, averaging 35% across all events. Rollout of new membership model may help reduce late cancellations and no-shows.

1. KEY ACTIVITIES

COMPLETED EVENTS

- February 12, Orlando - Cleary sponsored lunch
- March, Virtual - WIFM sponsored Women's History Month - 3 sessions
- March 5, DC - Cleary sponsored event
- March 7, New York – WIFM New York Stock Exchange Closing Bell
- March 24, Boston - JP Morgan sponsored event
- March 25, New York - Deutsche Bank sponsored event
- March 27, Hong Kong - Jefferies sponsored event
- **April 3, New York - S&P Marquee Event**
- April 22, Singapore - BofA sponsored event
- **June 5, NYC - Options Group Marquee Event**
- **June 17, LA – TCW Marquee Event**
- June/July/August, Virtual - WIFM sponsored Summer Leadership Series - 3 sessions
- **September 18, New York - DTCC Marquee Event**
- **September 25, New York - Capital Group Marquee Event**
- **September 30, Chicago - CME Group Marquee Event**
- October 7, New York - WIFM Senior Women Event
- November 3, New York - WIFM Senior Women Event
- **November 11, Houston - Bloomberg Marquee Event**
- **November 12, New York - Nomura Marquee Event**
- November 13, New York - BNPP sponsored event
- December 2, Boston - State Street sponsored event

MARQUEE EVENTS to be completed in January 2026:

- Bank of America (TBD NYC)
- LSEG / TP ICAP (TBD Paris)

2. PROGRESS & IMPACT

- **Events:** Completed 6 virtual and 18 in person events in cities across U.S. and Asia
- **Attendance Rate:** Average attendance rate of 65% remains below ideal 75% target rate
- **Geographic Expansion:** Successfully hosted events in NYC, Boston, DC, Orlando, Hong Kong, Singapore, LA, Chicago, and Houston.

3. CHALLENGES & OPPORTUNITIES

Challenges & Mitigation

- **Sponsor Engagement:** only 2 sponsors did not confirm a marquee event for 2025 but tentatively planned for January 2026 (compared to 50% confirmed at mid-year report)
- **Attendance Reliability:** Despite reminder emails and attendance policy notices, no-show rates remain at approximately 35%; will monitor any changes to this baseline after new membership model is rolled out

Opportunities for 2026

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

4. SUPPORT NEEDED FROM THE BOARD

Sponsor Engagement

- Request: assist Event Committee by starting discussions with sponsors on potential topics and dates for 2026 marquee events

Women in Financial Markets

Governance & Nominating Committee Update Report

Date: 12/1/25

2025 Committee Goals
1. Add & onboard 4 Board Members, including 2 in EU/UK and 2 in the US. Currently WIFM has 15 Board Members. There will be 19 Board Members on 1/1/26, with 5 of the 19 in the EU/UK.
2. Ensure Committees are properly resourced, with Chair & Board Members
3. Continue engagement with Advisors & Ambassadors
4. Succession planning for Board
5. Update Bylaws

1. Key Activities

Summarize major initiatives and updates since the last meeting:

- Nominated and voted on 4 new Board Members at the Annual WIFM Election & Strategy Session on 9/4/2025.
 - The Governance & Nominating Committee interviewed the 4 proposed candidates in advance of the recommendations to the Board.
 - Majority of the WIFM Board voted to add Tara Pardo, Katie Oliverio, Simona Composto, & Vanessa Battaglia to become Board members.
- 4 new WIFM Board members will begin service on 1/1/2026. Each new Board member has been assigned a “board buddy” and will be assigned to 2 WIFM Committees.

- Circulated nomination forms for current WIFM Board members to recommend prospective Board Members and Ambassadors.
 - Current board members should refer potential Board and Ambassador candidates based on qualities including character, commitment to serve WIFM, professional experience, background and geographic location.
 - Please send nominations for Governance & Nominating Committee to consider.
- Reviewed Committees. Made adjustment and new Committee assignments for the new Board Members. Rebalanced Committee composition.
- Changed the cadence for the annual board assessment. Board members historically completed the board assessment before the Annual Election meeting (moved from June to Sept). A 2-year cadence is appropriate, so the next assessment will be in September 2026.
- Moved Annual Election & Strategy Meeting to September.
- Experience/Skills matrix – updating to include new 2025 Board members (Nicola, Samantha, Marta) and new additions for 2026 (Tara, Katie, Simona, Vanessa).

2. Progress & Impact

Provide concise updates on goals and outcomes:

- Progress:
 - Identified priority prospective Board Members during Gov & Nom Committee meeting. Added 4 Board members for 2026.
 - Committees must set up meetings for 2026. Board Committees ensure accountability for all WIFM’s initiatives and drive growth of the organization. Confirmed in matrix.
- Impact Metrics:
 - Committee meetings underway.
 - Receive prospective nominations from current Board members, reach out to prospective Board Members and facilitate conversations with the Gov & Nom Committee.
 - Update WIFM Bylaws.

3. Challenges & Opportunities

Briefly outline:

- Challenges:
 - Enhancing prospective EU/UK Board Members.
 - Connecting with prospectives to build pipeline.
 - Re-election / roll-off will align with calendar year, but need to confirm 3 year terms (beginning & end) with each Board members (Jan 1st start, end on Dec 31st two years later).
- Opportunities:
 - Leverage recommendation form so current Board Members can help build the pipeline of prospective Board members.

4. Support Needed from the Board

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

- Share Board recommendation via form.
- Stay engaged with Ambassadors supporting the Committees and share feedback.

Women in Financial Markets
Leadership Committee Update Report
 December 8, 2025

2025 Committee Goals <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 met routinely throughout the year and we have received positive feedback from many participants. Cohorts will receive surveys for feedback (formally or informally)
- End of year parties across many regions for wolfpacks and mentorships are taking place in December.
- Applications for wolfpacks and mentorships have gone out and published on website.

2. Progress & Impact

Provide concise updates on goals and outcomes:

- Progress: Cohorts met; wolfpacks and mentorships successful through year; conference planning to begin
- Impact Metrics: Informal feedback on cohorts, mentors and wolfpacks have been positive.

3. Challenges & Opportunities

Briefly outline:

- Challenges: We need to search for a venue for 2026 conference in May. Many leadership members and ambassadors are starting to inquire on locations.
- Opportunities: Ideally we find a bigger space than last year.

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 themes and speakers now for invites in Jan.