



Women in Financial Markets Board Meeting 12/8/25 Meeting Minutes

On December 8, 2025, a meeting of the Board of Directors (“Board”) of Women in Financial Markets (“WIFM”) was held, commencing at 3:00 p.m. (Eastern).

Board members participating in person: Tara Dziedzic, Victoria Greenberg, Lona Mozumder, Katie Oliverio, Tara Pardo, Marta Poleszczuk, Joyce Thormann, Bari Trontz, Tracy Rucker-Wilson, Karen Wares and Julie Winkler

Board members participating virtually: Vanessa Battaglia, Simona Composto, Nichola Hunter, Tracey Jordal, Jackie Mesa and Margoth Pilla

Board members who were unable to attend: Susi de Verdelon and Samantha DeZur

Melody Mokhtarian participated in her role as Director of Membership and Development and Alexa Simone participated in her role as Membership and Events Coordinator at the invitation of the Board.

Ms. Winkler called the meeting to order.

President & CEO Update:

Ms. Wares offered condolences to the board on the tragic passing of Cassandra Seier. She shared that Ms. Seier would want the organization to keep going and that the board should know she had trust in us to continue the mission of WIFM.

Ms. Wares shared that the proposed membership tiers were passed by board vote and that feedback received would be taken into consideration. She also shared that her goals for 2026 include establishing more structure in global regions and provide clearer definition/scope of WIFM committees and the roles of board members and ambassadors assigned to the committees.

Board Chair Remarks:

Ms. Winkler highlighted how proud she was of the board coming together to support one another.

She also shared with the board the successful event in Singapore and thanked the grass roots effort by local WIFM ambassadors to curate a great event.

Sponsorship Committee:

Ms. Wares congratulated the board on a very successful Gala and shared that the Gala raised \$834,000 with 47 sponsors. She shared that the committee is working on securing the venue for 2026 and will keep the board updated.

EU/UK Committee Update:

Ms. Jordal shared that the EU/UK has seen growth in Q4 of this year. She congratulated the board on a very successful EU Gala and shared that there were a lot of posts and visibility. She shared they are still establishing activity in Paris, with a potential event in January if they can identify a few women in Paris to help.

The committee will have a strategy session to identify better ways to recruit sponsors that are based in the UK/EU. They are also looking to expand working group members located in other cities, while continuing to partner with other institutions/firms.

Finance Committee Update:

Ms. Pilla shared that the budget is in a net positive and that the organization can use membership fees to help maintain a full year of expenses on reserve.

She will continue to investigate how WIFM can potentially incorporate in the UK.

Events Committee Update:

Ms. Rucker Wilson shared that the committee was successful in diversifying the locations of WIFM events. She also asked for at least 1 WIFM board member attend each event.

Governance Committee:

Ms. Dziejcz shared that the goal of adding four new board members had been accomplished, with onboarding effective in January. She shared that committee assignments for board members and ambassadors will be communicated shortly.

The board should continue sending recommendations for board prospectives and ambassador nominees.

Leadership Committee:

Ms. Mesa shared that the cohorts have ended for the year and that the cohort leads are in the process of hiring/renewing the leadership coaches.

She also shared the mentorship applications have opened and that we are still actively recruiting mentors. Wolfpack applications will open shortly.

Membership & Development update:

Ms. Mokhtarian provided the board a preview of the private portal on the WIFM website.

Further Business:

Ms. Wares shared with the board that she is looking into having a board retreat and her goal was to host it in Q1/Q2.

Adjournment: With no further business, the meeting adjourned.