



Women in Financial Markets
Sponsorship and Membership Committee Update Report

Date: March 3, 2026

2026 Committee Goals (including metrics to achieve by year end)
Increase number of sponsors from 47 to >50 (6% YOY growth)
Increase number of paying US members from 175 to 263 (50% increase vs Feb 2026)
Expand membership and engagement in 5 target US cities

1. Key Activities

Major initiatives and updates since the last meeting:

- New committee established to oversee WIFM sponsorship and membership initiatives.
- Finalized the 2026 sponsorship drive email and 1-page attachment describing sponsorship benefits by level.
- Begin outreach to all existing and prospective sponsors in mid-March.

2. Progress & Impact

Updates on goals and outcomes:

- Progress: Tribeca 360 reserved for the 2026 NYC WIFM Gala on 22 October.
- Metrics:
 - Two organizations have already confirmed 2026 sponsorship (Tradeweb & DRW holdings at Platinum level).
 - Roll out of paid membership in the US has resulted in 47 for Visionary tier 128 Champion tier in the past 2 months (excluding complimentary memberships).
 - Global membership has grown to over 9,000 members through year-end 2025. Committee will: (1) define what is a “member”?, (2) ensure database is scrubbed to remove duplicates and individuals with no contact information, and (3) establish a 2026 goal to increase YOY membership growth by 10%.

3. Challenges & Opportunities

- Challenges: Establish an outreach model to increase new Visionary and Champion member signups throughout the year. Retain existing sponsors while onboarding new sponsors.
- Opportunities: Board members, advisory council and ambassadors to start engaging with sponsors now. Create a list of new potential sponsoring organizations.

4. Support Needed from the Board

- Review full current sponsor list and confirm assigned firms. Begin outreach for 2026 Gala.
- Confirm board coverage for each sponsor relationship.

Women in Financial Markets
EMEA Committee Update Report
Date: March 3, 2026

2026 Committee Goals <i>(including metric(s) to achieve by year end)</i>
<p><u>Events/Leadership</u></p> <ul style="list-style-type: none"> EU Gala for 200 guests in November 2026 Launch inaugural paid-for EMEA WIFM Conference 2 Flagship Events + 4 General Events (all on technical content) 6 Conferences (max. 1 on soft skills) 2026 Target Locations: Paris, Frankfurt, Milan, Amsterdam, Abu-Dhabi/Dubai, secured with Wolfpacks
<p><u>Membership/Sponsorship</u></p> <ul style="list-style-type: none"> Establish UK legal entity proposal
<p><u>EU Working Group/Nomination Committee</u></p> <ul style="list-style-type: none"> Review WG Future Leaders: Aim for 1-2 additions to Ambassador every 6mths

1. Key Activities

Summarize major initiatives and updates since the last meeting:

- [Highlight key activities or programs.]

Completed Events:

- **Event with LSEG and TP ICAP - Significance of Paris: Rise of the New Global Financial Centre in Paris** – Jan 20
- **Event with Eurex WomenDBG - Mental Health and Wellbeing for Women Working in Finance Workshop** – Jan 22

Upcoming Events:

- **Eurex Derivatives Forum - WIFM German Dinner in Frankfurt** – Feb 24
- **Eurex Derivatives Forum - WIFM Breakfast & Fireside Chat in Frankfurt** – Feb 25
- **Event with Bloomberg - Outlook 2026: Focus on Geopolitics and Financial Markets** – Mar 5
- **FIA IDX Breakfast in London** – Jun
- **EU Conference in London** – Jun
- **Fixed Income Leaders Summit (FILS) in Antipolis** – Oct 13-15
- **JPMAM and Women in ETFs Event in London** – Nov 11
- **EU Gala in London** – Nov

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

- **30** senior women RSVPed for the Derivatives Forum German Dinner

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**
- Q1 2026 (as of Feb 18): **2,100 members**

Quarterly Growth

- Q1: **+105** new members
- Q2: **+79** new members
- Q3: **+144** new members
- Q4: **+343** new members
- Q1 2026: **+293** new members

2026 Programming

- **225** women based in Europe participating in the **Wolfpack Program**, making up **22** Wolfpacks
- Out of 338 individuals in the **Mentorship Program**, **86** are based in EU/UK (representing **25%**)
- Out of 102 women in our **Leadership Cohorts**, **25** are based in EU/UK (representing **~25%**)

3. Challenges & Opportunities

Briefly outline:

- Challenges: [Identify any key hurdles or risks.]
 - Lack of ability to fundraise locally in EMEA continues to be a challenge
 - Temporary time constraints on 1 EU Board Member (Susi de Verdalon)
- Opportunities: [Potential areas for collaboration or new areas to explore.]
 - Continued focus to add WG members based in 2026 target locations
 - 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
 - Drive membership via sponsorship activation – Target: 100+ senior leaders
 - Engage more pro-actively with Male Allies in region – Target 10 EMEA based

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: March 3, 2026

2026 Committee Goals <i>(including metric(s) to achieve by year end)</i>
Work closely with the Sponsorship Committee to align on fundraising goals and collect sponsorship funds in a timely manner
Target: Minimum: \$750K; Stretch Goal: \$825K
Propose and maintain oversight of WIFM's budget and finances. Work collaboratively with other Committees to support their financial needs
At a minimum meet budgeted revenue & come in at or under the expense budget
Develop and implement an investment strategy for excess funds
Work with the Leadership Committee on plan to perpetuate the Cassandra Seier Scholarship
Assist as needed on a UK legal structure and setup to support WIFM's expansion in the region
Ensure completion of all annual tax filings and regulatory reporting to maintain not-for-profit status <ul style="list-style-type: none">• Submit State of Delaware annual filing by March 1st• Submit IRS 990 and NYS tax filings by November 15

1. Key Activities

Summarize major initiatives and updates since the last meeting:

- Similar to previous years, we concentrated on collecting the \$97K in outstanding 2025 receivables.
- Finalized the 2nd draft of the 2026 budget being presented to Board for approval at the March 3rd Board meeting.
- Initiated discussion at the Feb 17 Finance Committee meeting regarding establishment an investment policy. WIFM Ambassador and committee member, Tracey Rinaldi, to assist.
- In initial discussions with Jackie Mesa on options for perpetuating the Cassandra Seier scholarship fund.

- Committee member, Vanessa Battaglia, is part of the European team working the most suitable UK legal structure for WIFM.

2. Progress & Impact

Provide concise updates on goals and outcomes:

Progress:

- Received \$50.5K of the \$95.5K in outstanding sponsorship commitments.
- Issued the required 2025 1099 tax forms to our vendors and 2025 gala tax receipts to our sponsors.
- Delaware annual filing submitted on time.
- Donations to date earmarked for the Cassandra Seier Scholarship fund total \$20K. These are considered restricted funds and can only be used for this purpose.

Impact Metrics:

- Current cash on hand net of reserves can cover over 52% of the proposed 2026 expense budget.
- Moved \$150K to the Vanguard account to maximize returns on the excess cash we have on hand. Current balance is \$763K. We will move funds back into the Chase operating account as needed.
- Payments for 2026 programming are in full swing.

3. Challenges & Opportunities

Challenges:

- While collection of sponsorships greatly improved from years past, outstanding sponsorships continue to spill over to the following year.

Opportunities:

- Establishment of the most suitable legal structure in the UK that allows for expansion in the region
- Establishment of an investment policy that maximizes return on excess funds while preserving principal

4. Support Needed from the Board

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

**Women in Financial Markets
Events Committee Update Report
Date: March 3, 2026**

2026 Committee Goals (including metric(s) to achieve by year end)
20 events - Americas & APAC (including sponsor benefits)
Reduce no-show rate

Continue building out event programming in new geographic locations, aligning with 5 locations for membership growth and engagement

Discussion of goals

Event goal: Last year the Committee's goal was 15 events. The goal this year will be 20 events, a 30% increase, with continued expansion of programming opportunities across regions in the Americas and APAC. Ambassadors will be utilized more fully to help plan events and execute logistics.

Attendance: The average attendance rate in 2025 was 65%. The goal for 2026 is to maintain a 75% average attendance, supported by the new membership tiering structure and financial commitment to attend some in-person events.

Geographic expansion: In 2025, WIFM hosted events in 9 US & APAC cities: New York, Boston, Washington DC, Orlando, Hong Kong, Singapore, Los Angeles, Chicago, Houston (UK & EMEA reported separately). In 2026, the Events Committee will partner with the Sponsorship and Membership Committee to identify key locations that align with WIFM's membership growth, using events to help women connect in some of the most active financial services hubs.

1. Key Activities

Summarize major initiatives and updates since the last meeting:

Completed Events

- January 20, NYC: Bank of America marquee event
- January 20, Paris: LSEG and TP ICAP event
- February 11, Austin: Cleary sponsored lunch at FIA/SIFMA AMG conference

Upcoming Events (and Programs) in Progress

- February-May, virtual: City CV board director series - 4 sessions
- March, Virtual: WIFM sponsored Women's History Month - 4 sessions
- March 4, Sydney: Future of APAC Capital Markets, DTCC event
- March 5, NYC: Equinox spin class for Trailblazers
- Week of April 20, NYC: Generation Love event
- April 30, NYC: Options Group marquee event
- April/June TBD, NYC: Tradeweb marquee event
- May, NYC: WIFM conference
- June/July TBD, NYC: Dechert event
- October 22, NYC: WIFM gala

2. Progress & Impact

- Progress: First committee meeting held to organize, discuss upcoming events, and assign an ambassador to each event to help lead planning and execution.

3. Challenges & Opportunities

- Challenges: One key challenge as WIFM expands into additional cities will be ensuring enough bandwidth to handle logistics and maintain high quality programming.
- Opportunities: Leverage the team of ambassadors, especially in key cities identified as growth opportunities, to help plan events.

4. Support Needed from the Board

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

- Assist Event Committee by starting discussions with sponsors on potential topics and dates for 2026 marquee events.
- Board members should attend as many events as possible, prioritizing sponsors’ marquee events, and ensure a minimum of one board member at each in person event to introduce the event, thank hosting organization, speakers, and attendees, promote upcoming events, describe WIFM membership/value, etc.

Women in Financial Markets
Governance & Nominating Committee Update Report
March 3, 2026

2026	Committee Goals
	19 Board Members, as of 1/1/26 - - 14 based in the US, 5 EMEA
	Ensure Committees are properly resourced, with Chair & Board Members
	Engagement with Advisors & Ambassadors
	Succession planning for Board and Officers
	Update Bylaws

1. Key Activities

Summarize major initiatives and updates since the last meeting:

- 4 new Board Members elected at the Annual WIFM Election & Strategy Session on 9/4/2025 have been onboarded & service began 1/1/2026.
 - Assigned “Board Buddies”
 - Completed Experience/Skills Matrix
 - Added to Committees
- Committee review
 - Described and defined focus/responsibilities of the Committees
 - Made adjustment and new Committee assignments for the new Board Members
 - Balanced Committee composition.
- New Communications & Marketing Committee
- Added “Membership” to the Sponsorship Committee
 - Expanded responsibilities under “Sponsorship & Membership Committee”
 - Targeted efforts to retain & expand revenues from corporate sponsors & Gala support
 - Targeted efforts to launch, track & expand revenues from individual members

- Established “Conference Lead” and “Scholarship Lead” under Leadership Committee
- Circulated nomination forms for current WIFM Board members to recommend prospective Board Members and Ambassadors
 - Refer potential Board and Ambassador candidates based on qualities including character, commitment to serve WIFM, professional experience, background and geographic location.
 - Seeking senior, experienced individuals
 - Diversity, fill current/future gaps
 - Geography (growth regions)
 - Firms and experience (Private Markets, AI/Fintech, Trading)
 - Send nominations for Governance & Nominating Committee to consider.
- Board assessment planning for Sept 2026
- Annual Election meeting will also be Sept 2026

2. Progress & Impact

Provide concise updates on goals and outcomes:

- Progress:
 - Added 4 Board members for 2026
 - Notified all Board Committees/Chairs that meetings for 2026 should be set up to ensure accountability for all WIFM’s initiatives and drive growth
 - 5 Nom & Gov meetings on the calendar for 2026
 - Initial meeting on 2/12/26
 - Ambassadors reviewed & confirmed Committee placement
 - Two Advisory Council additions approved:
 - Fred Crosnier - <https://www.linkedin.com/in/frederic-crosnier-84249b/>
 - Tamira Treffers-Herrera - <https://www.linkedin.com/in/tamira-treffers-herrera/>
 - Bylaw feedback & edits (in progress). Bylaw updates/clarifications:
 - Term limits
 - Officer roles
 - Conflicts of Interest
 - Committees
 - Ambassadors
 - Advisory Council
 - Refreshing/updating Board Prospectives (in progress)
 - Prioritize
 - Set up calls/meetings to screen
- 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

- Challenges:
 - Refreshing, prioritizing & 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
March 3, 2026

2026 Committee Goals <i>(including metric(s) to achieve by year end)</i>
Organize and Execute 2026 WIFM NY Conference with Record Attendance
Make sure all cohorts are engaged and attending throughout 2026.
Conduct 4 meetings for mentorships and wolfpacks leads throughout 2026. Make sure connections are continually at least monthly.
Create parameters and amount for Cassandra Seier Scholarship

1. Key Activities

- Mentor and Mentee matches set and calls for mentee and mentor orientation took place.
- Wolfpack groups formed and call for wolfpack leads took place
- Cohorts formed and first meetings have occurred for 3 out of 4 cohorts.

2. Progress & Impact

Provide concise updates on goals and outcomes:

- Progress: Conferences: Tentative sponsor and host for WIFM conference is Deutsche Bank in NY on May 6.
 - Mentors and Mentees have been matched with 169 matches. Ensured all had chemistry calls.
 - 50 wolfpacks created with close to 500 women
 - 3 Cohorts formed; 1 nearly formed – approximately 26 in Emerge, 54 in Rising Stars and 22 in Trailblazers; Call for Male Ally nominations is out.

3. Challenges & Opportunities

Briefly outline:

- Challenges:
 - Many mentors and mentees didn't show up for initial chemistry calls or wanted to be rematched even after we tightened the application forms. Consider whether we continue to take student mentees.
- Opportunities: Excited for cohorts and more opportunities for in-person gatherings of cohorts, mentors/mentees and wolfpacks.

4. Support Needed from the Board

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

- Would like thoughts on **conference** themes and conference keynotes
 - Last year's theme "Navigating Change: Identifying Risks and Opportunities in Financial Markets"
 - Keynotes best if there's a personal connection
- **Cassandra's scholarship** raise is around \$21,000. Working with Margoth, we propose an annual scholarship of \$2,500. The rest is invested so we don't touch principal but fund an annual scholarship from earnings.
- If the board wants a higher raise for a larger scholarship, we can put a portion of the board annual donations towards the scholarship for 1-2 years and raise funds from the Advisory Council, which she ran. Need board feedback on this idea.
- Also, need feedback on candidates for Cassandra's scholarship. Other scholarships are for graduating high school students, focus on interest in financial services and need.

**Women in Financial Markets
Marketing & Communications Committee Update Report
Date: March 3, 2026**

2026 Committee Goals <i>(including metric(s) to achieve by year end)</i>
Strategic Partnerships & Industry Visibility Expand partnerships across industry conferences, women's organizations, and social impact initiatives, and establish a WIFM's official Speakers Bureau. Year-End Targets: <ul style="list-style-type: none">• 3 conference partnerships + 3 speaking engagements + branded activations• 2 women's organization partnerships + 1 consolidation/merger advanced• 1-2 social impact partnerships• Launch WIFM Speakers Bureau framework
Social Media Growth Strengthen digital visibility and launch Instagram. Year-End Targets: <ul style="list-style-type: none">• +10% LinkedIn growth (14,000 → 15,400+)

<ul style="list-style-type: none"> • Launch Instagram • 1,000 Instagram followers
<p>Targeted Membership Growth (Paid Promotion) Drive sector- and region-focused membership expansion. Year-End Targets:</p> <ul style="list-style-type: none"> • 20 new paying U.S. members • 50 new member sign-ups in Asia & EMEA • Track campaign performance (CTR, engagement, conversions)
<p>Content & Media Visibility Expand thought leadership and external visibility. Year-End Targets:</p> <ul style="list-style-type: none"> • 6 member spotlight features • 3 media mentions/placements

Key Activities Since Launch

- Finalized and approved 2026 Charter; established workstreams and accountability.
- Initiated conference outreach (MFA, Eurex, iConnections, Greenwich Economic Forum, LPGP).
- Began discussions with United Way NYC (Women United) for joint social impact programming.
- Developing 2026 editorial calendar and Instagram launch plan.
- Defined geographic and sector targeting for paid campaigns (U.S., Asia, EMEA; private markets, asset management, digital assets).
- Structured Spotlight Series cadence and began media outreach planning.

Progress

- Governance and KPI framework established.
- Partnership pipeline initiated.
- Social growth and paid targeting strategies defined.
- Instagram launch planning underway.
- Execution is in early stages; performance will be tracked quarterly against year-end targets.

Challenges & Opportunities

Challenge: Early-stage execution across multiple new initiatives.

Opportunities:

- Conference visibility for WIFM leadership
- Strategic collaboration with United Way NYC (Women United)
- Instagram as a new awareness channel
- Geographic expansion via targeted campaigns

Board Support Requested

- Identify priority conferences and partnerships
- Input on consolidation opportunities with other women’s organizations
- Participation in speaking/media opportunities
- Social amplification support