

Women in Financial Markets (WIFM)
Marketing & Communications Committee Charter
February 26, 2026

Purpose

The Marketing & Communications Committee drives the strategic positioning and visibility of Women in Financial Markets (WIFM), supporting sustainable membership growth and organizational expansion across sectors and regions.

The Committee advances WIFM's mission to connect, elevate, and advance women in financial services through disciplined brand stewardship, targeted communications, and market expansion initiatives.

A core 2026 priority is to support expansion of WIFM's geographic footprint and deepen engagement within private markets, asset management, and the digital asset sectors.

Scope

The Committee oversees WIFM's external brand presence, strategic communications, partnerships, and promotional strategy.

It operates in close coordination with the Board and Events Committee to ensure activities directly support organizational growth, sponsor engagement, and industry credibility.

Strategic Objectives

- Strengthen WIFM's industry positioning and brand credibility
- Expand reach into new geographic markets
- Increase penetration within private markets, asset management, and digital assets
- Drive measurable membership growth and engagement
- Position WIFM leadership as visible, credible voices across financial services
- Maintain disciplined, consistent messaging aligned with WIFM's mission and strategic direction.

Operating Model

- Members: Bari Trontz (Board Member), Lona Mozumder (Board Member), Vanessa Battaglia (Board Member), Alexa Simone (WIFM), Tracey Rinaldi (Ambassador)
- Work organized through defined strategic workstreams with designated Leads
- Quarterly priority-setting aligned to growth objectives
- Performance measured through engagement, audience expansion, partnerships, and membership growth metrics

Success Measures

- Brand visibility and industry recognition
- Membership and event participation
- Sponsor and strategic partner engagement
- Geographic reach and sector penetration

Strategic Workstreams

1. Social Media (Lead: Lona Mozumder)

Mandate: Expand WIFM’s digital footprint across social platforms, including the launch of a WIFM Instagram channel. LinkedIn remains the primary social platform. Instagram will serve as a complementary, community-focused channel to showcase the WIFM experience — including events, programs, and member stories — and generate interest among prospective members.

KPIs: Engagement rates, audience growth, and membership inquiries sourced from social channels.

2. Strategic Partnerships – Women’s Organizations (Lead: Vanessa Battaglia)

Mandate: Expand reach and influence through selective partnerships or consolidation with aligned women’s finance organizations, including those with strong regional or sector-specific presence.

KPIs: New strategic partnerships established, co-branded initiatives executed, new member acquisition attributable to partnerships.

3. Community & Cause Partnerships (Lead: Bari Trontz)

Mandate: Align WIFM with thoughtfully selected social and charitable initiatives that reflect member values and provide meaningful opportunities to give back while strengthening member engagement and networking.

KPIs: Member participation, visibility generated, partner engagement and ongoing collaboration.

4. Industry Conferences & Visibility (Lead: Bari Trontz)

Mandate: Position WIFM and its members as visible leaders across key financial services conferences, ensuring representation across the full spectrum of the industry, including areas of targeted growth such as private markets, asset management, and digital innovation. Engagements will be mutually beneficial and cost-neutral.

KPIs: Speaking engagements placed, WIFM branded sessions, visibility generated.

5. Advertising & Growth Promotion (Lead: Alexa Simone)

Mandate: Deploy targeted paid promotion, primarily through LinkedIn sponsored campaigns, to accelerate visibility and membership growth in priority sectors and geographies.

KPIs: Engagement metrics (CTR, impressions, interactions), audience expansion in priority segments, campaign-driven membership growth.

6. Communications, Content & Brand Positioning (Lead: Full Committee)

Mandate: This workstream is the shared responsibility of the entire Committee. It shapes and stewards WIFM's market narrative through strategic communications with sponsors, members, partners, media, and prospective members.

Core focus areas include organizational messaging, brand governance, thought leadership and storytelling initiatives (e.g., Spotlight Series, video features, member profiles), and selective media relations to enhance industry credibility and visibility.

KPIs: Stakeholder engagement, content performance (opens, clicks, views, shares), media mentions and press placements, brand visibility within priority sectors.

7. WIFM Speakers Bureau (Lead: Vanessa Battaglia with Alexa Simon and Tracey Rinaldi support)

Mandate: Establish WIFM's official Speakers Bureau to position WIFM leadership and select members as visible, credible voices across conferences, panels, and media engagements.

This workstream will develop clear speaker criteria and an intake process, build and maintain a centralized database capturing expertise, sector focus, geography, and prior speaking experience, and create standardized speaker profiles. The WIFM Speakers Bureau will support proactive placement of WIFM speakers at industry events.

KPIs: Successful launch of the Speakers Bureau framework, establishment of a populated speaker database, and speaking engagements sourced through the Bureau.