



Women in Financial Markets Board Meeting 3/3/26 Meeting Minutes

On March 3, 2026, a virtual 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 virtually: Vanessa Battaglia, Susi de Verdelon, Tara Dzedzic, Victoria Greenberg, Nichola Hunter, Tracey Jordal, Jackie Mesa, Lona Mozumder, Katie Oliverio, Tara Pardo, Margoth Pilla, Marta Poleszczuk, Joyce Thormann, Tracy Rucker-Wilson, Karen Wares and Julie Winkler

Board members who were unable to attend: Simona Composto, Samantha DeZur and Bari Trontz

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.

Approval of Board Minutes:

The December 18, 2025, Board meeting minutes were approved.

Board Chair Remarks:

Ms. Winkler thanked everyone for their hard work and noted that WIFM’s Q1 program numbers already reflect the strong impact the organization is making. She added that WIFM is on track for another busy and productive year.

President & CEO Update:

Ms. Wares noted that the Board offsite will be held May 1-3 in Tarrytown, NY. She looks forward to strategic discussions and the opportunity to connect with one another. She asked board members to please RSVP to Melody if they can attend.

She noted that the Board will begin receiving monthly updates to provide greater transparency into global activities. She invited Board members to share feedback or additional information they would like included in the updates.

Ms. Wares acknowledged the slower-than-anticipated growth in paid memberships and emphasized that the promotion of memberships and the delivery of value to paying members will be ongoing areas of development.

She also reiterated that one of this year’s priorities is advancing the regional growth strategy, with a focus on strengthening community engagement and establishing clearer structure in key strategic locations. Ms. Wares referenced an email previously shared with the Board and noted that the Sponsorship Committee will now also assume membership engagement responsibilities to support the regional expansion initiative.

Sponsorship & Membership Engagement Committee:

Ms. Greenberg reported that the committee will soon distribute the 2026 sponsorship package for board members to begin their outreach to their sponsors. Two email templates, one for past sponsors and one for new sponsors, will be included. She asked Board members to personalize the correspondence and copy Melody so outreach can be tracked.

She noted that the committee will also share a prospect list and requested that Board members provide updates as they engage with prospects.

Ms. Greenberg acknowledged that paid membership growth is currently below budgeted projections. She emphasized the importance of continuing to identify meaningful benefits that encourage individuals to become WIFM members, such as “member-only” perks like the Equinox event or preferred access to key WIFM programs. She invited Board members to share ideas with her and with Ms. Rucker-Wilson.

It was also noted that the website will be updated to streamline the membership sign-up process.

EMEA Committee Update:

Ms. Jordal reported that the committee has been renamed EMEA to reflect its expanded outreach in the Middle East.

She noted that the committee is currently evaluating venues for the Gala, with a target attendance of 200 participants.

She also shared plans to launch WIFM’s first inaugural paid conference outside the United States in June and invited Board members to suggest potential keynote speakers.

Ms. Jordal added that, while past programming has focused primarily on soft-skills content, this year’s events will emphasize more substantive topics. She also noted that post-event surveys will be distributed to attendees, including questions about how participants would like to get involved, to help strengthen WIFM’s presence outside the US.

She concluded by highlighting that membership growth in the region has almost doubled, driven largely by the events held throughout the EU.

Finance Committee Update:

Ms. Pilla reported that the initial revenue forecast will need to be revised due to lower-than-expected paid membership numbers. She noted that she will share the updated forecast with Board members and will seek electronic approval.

She also shared a suggestion that the Board invite Advisory Council members to contribute to the Cassandra Seier Scholarship, allowing WIFM to invest the funds and use the interest to support future scholarships. She added that she is exploring additional investment opportunities.

Ms. Pilla requested Board approval of the 2026 expenses and the year-end financials. A motion was made for both items and both were approved by the Board.

Events Committee Update:

Ms. Rucker-Wilson reported that one virtual series has already launched and that the Women’s History Month webinar series will begin this week. She also shared that the committee, in collaboration with the

Ambassadors, has begun planning the marquee events for the year. She noted that the committee will continue to support events in the traditional cities while also aligning programming with the regional growth strategy.

She added that Melody will update the sponsorship tracker with the status, and Board members were encouraged to remind their sponsors of this benefit during their 2026 sponsorship outreach.

Ms. Rucker-Wilson emphasized the value of having WIFM Board representation at all events for opening or closing remarks and networking. She asked Board members to aim for 3–4 representatives at each marquee event and to inform Melody of their availability.

Governance Committee:

Ms. Dziedzic reported that a new committee, Marketing & Communications, has been added and that paid membership responsibilities now fall under the Sponsorship Committee.

She reminded the Board to continue submitting nomination forms and to provide recommendations for prospective Board members and Ambassador nominees.

Ms. Dziedzic also noted that Board terms will now follow a calendar-year cycle, reflecting the shift of Board elections to September. Terms will begin in January and run through the end of the year, with each term lasting three years. She added that she is currently reviewing the bylaws to reflect updates.

Leadership Committee:

Ms. Mesa reported that the Wolfpack, Mentorship Program, and three of the four cohorts have officially kicked off for the year.

She noted that planning is underway for the annual conference, with the hope that Deutsche Bank will host on May 6. The committee is developing the event theme and identifying potential speakers.

Board members were asked to submit any speaker or keynote recommendations to Jackie and Melody.

Marketing & Communications:

Ms. Mozumder reported that the committee is exploring conference partnerships and has developed an operating model organized into six workstreams. She noted that the committee is focused on identifying strategies to increase membership, including establishing a speaker’s bureau and launching an Instagram presence.

Further Business:

It was noted that WIFM has access to up to 20 hours of pro bono legal support from Dechert for contract reviews, bylaw updates, and other legal needs. Please let Ms. Mesa know what you need.

The Board also discussed that members of the community occasionally express interest in volunteering. Ms. Jordal shared that the EMEA Committee has an established process for managing volunteer inquiries and will circulate it to the full Board.

Board members and staff were additionally asked to compile a list of projects or tasks that need to be completed so that a centralized “punch list” can be created.

Adjournment: With no further business, the meeting adjourned.