Women in Financial Markets
Governance & Nominating Committee Update Report
Date: 6/4/26

2026 Committee Goals
1. 19 Board Members, as of 5/29/26 - - 14 based in the US, 5 EMEA
2. Ensure Committees are properly resourced, with Chair & Board Members
3. Engagement with Advisors & Ambassadors
4. Succession planning for Board and Officers
5. Update Bylaws

1. Key Activities

Summarize major initiatives and updates since the last meeting:

- Confirmed and announced 2 new Advisory Council Members: Tamira Treffers-Herrera, Rabobank Vice Chairperson and Co-Head North America Wholesale Coverage (Atlanta based); Fred Crosnier, JP Morgan Global Head of Operations, Asset Management
- Checked in with new Board Members who were onboarded in January 2026
    - Committee participation
    - Assessed experience thus far
- Reviewed Committee assignments & new Communications & Marketing Committee
- Sponsorship Committee expanded to include "Membership"
- "Conference Lead" & "Scholarship Lead" providing dedicated support to Leadership Committee
- Circulated nomination forms for current WIFM Board members to recommend prospective Board Members and Ambassadors for Governance & Nominating Committee consideration
    - Refer potential Board and Ambassador candidates based on character, commitment to serve WIFM, professional experience, background & geographic location.
        - Seeking senior, experienced individuals
        - Diversity, fill current/future gaps
            - Geography (growth regions)
            - Firms and experience (Private Markets, AI/Fintech, Trading)
- Board assessment planning for Sept 2026
- Plan for Annual Election meeting in Sept 2026

2. Progress & Impact

Provide concise updates on goals and outcomes:

• Progress:

- Onboarded 4 Board members in 2026
- Board Committees/Chairs meetings underway for 2026, with accountability for WIFM initiatives
- Held 3 Nom & Gov meetings in 2026, plus 1 WIFM Offsite follow-up discussion with Board Members on Global Structure & Governance
    - 2/12/26
        - Ambassadors reviewed & confirmed Committee placement
        - Two Advisory Council additions approved:
            - Fred Crosnier, JP Morgan
            - Tamira Treffers-Herrera, Rabobank

- 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

- 4/14/26
  - Board Committees & Ambassador assignments reviewed
  - Discussed Advisory Council members & 2 additions approved:
    - Fred Crosnier, JP Morgan
    - Tamira Treffers-Herrera, Rabobank
  - Refined Advisory Council & Ambassador expectations
  - Continued Bylaw feedback & edits (in progress). Updates/clarifications:
    - Term limits
    - Officer roles
    - Conflicts of Interest
    - Committees
    - Ambassadors
    - Advisory Council
  - Refreshing/updating Board Prospectives (in progress)
- 5/20/26
  - WIFM Offsite follow-up discussion with Board Members on Global Structure & Governance
    - Discussed Ambassadors & Working Groups
    - Expectations & Accountability
    - Geographic expansion
- 6/2/26
  - Board Committees & Ambassador assignments reviewed
  - 2 Advisory Council members confirmed (will be added to WIFM website):
    - Fred Crosnier, JP Morgan
    - Tamira Treffers-Herrera, Rabobank
  - Dechert assisting with Bylaw update (in progress), with clarifications including:
    - Term limits
    - Officer roles
    - Conflicts of Interest
    - Committees
    - Ambassadors
    - Advisory Council
  - Refreshing/updating Board Prospectives (in progress)

Board Committees

- 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:

- Identifying, prioritizing & connecting with prospectives to build pipeline
- Re-election / roll-off alignment with calendar year. Must establish 3 year terms (beginning & end) with each Board members (Jan 1st start, end on Dec 31st two years later)

• Opportunities:

- Leverage recommendations from Board Members to help build the pipeline of prospectives

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
EMEA Committee Update Report
Date: June 4, 2026

2026 Committee Goals *(including metric(s) to achieve by year end)*
1. Events/Leadership 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
2. Membership/Sponsorship Establish UK legal entity proposal
3. EU Working Group/Nomination Committee 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:
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 in London** – Jan 22
- **WILG & WIFM Evening at The Fold in London (Exclusive Advisory Council Event with Georgie Dickins)** – Feb 24
- **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 in London** – Mar 5
- **Digital Assets Decoded Webinar** – Apr 21

Upcoming Events:

- **FIA IDX Breakfast in London** – Jun 17
- **EU Conference in London** – Jul 7
- **Event with Rabobank in Amsterdam** – Sept TBC
- **Event in Milan** – Sept TBC
- **TradeTech FX** – Sept 16
- **Event with Nomura and 100 Women in Finance** – Sept 24
- **Event with Maven Securities** – Oct 7 or 8
- **Fixed Income Leaders Summit (FILS) in Antipolis** – Oct 13-15
- **Event in Paris** – Oct 29
- **JPMAM and Women in ETFs Event in London** – Nov 11
- **EU Gala in London** – Nov
- **Tokenization Webinar** – TBC
- **ETFs Webinar** – TBC

2. Progress & Impact
Provide concise updates on goals and outcomes:

Entity Progress

- UK bank account has been opened
- Identified a law firm (CMS) that is interested in helping us achieve the charity entity status

Events

- **30** senior women RSVPed for the Derivatives Forum German Dinner
- **627 registered** for the Digital Assets Decoded Webinar, **242 attended**

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 February 18): **2,100 members**
- Q2 2026 (as of June 1): **2,333 members**

Quarterly Growth

- Q1: **+105** new members
- Q2: **+79** new members
- Q3: **+144** new members
- Q4: **+343** new members
- Q1 2026: **+293** new members
- Q2 2026: **+233** 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:
  - Lack of ability to fundraise locally in EMEA continues to be a challenge
  - Temporary time constraints on 1 EU Board Member (Susi de Verdelon)

- Opportunities:
  - 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:

- N/A

Women in Financial Markets
Sponsorship and Membership Committee Update Report
Date: June 4, 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:

- Continuing to reach out to existing and new corporate sponsors to promote 2026 Gala and sponsorship opportunities — need board to follow up on all outstanding leads
- Leveraging New York conference to promote US paid membership growth
- Revisiting paid membership structure based on results since launch; considering rolling vs annual structure
- Sponsor engagement event in planning stages for mid-July in New York to target 30-40 senior leaders
- Summer intern events for Sponsoring organizations currently in planning stages for NYC and Chicago

2. Progress & Impact
Updates on goals and outcomes:
- 20 organizations have confirmed 2026 sponsorship for a total of $490K, as of May 28.
    - Secured 54% of target fundraising goal ($900k), including 3 diamond premier and 6 Platinum sponsors
- Paid membership for 2026 in the US growth (excluding complementary members):
    - Champion tier: 137 (12 added in April/May 2026)
    - Visionary tier: 55 (9 added in in April/May 2026)
- Global membership growth across the regions:
    - Q1 2026: 874
    - Q2 2026: 407 (as of May 2026)
- Ongoing focus on the US target growth regions - LA, Chicago, Boston, DC and Houston

3. Challenges & Opportunities

Challenges:
- Establish an outreach model to increase new Visionary and Champion member signups throughout the year.
- Continuing to use this year to gather data on optimal membership model for the US. Discussions about moving to a rolling membership model ongoing.
- Updating disclosure policy for sponsors (ie data disclosure on their members) and membership policy (ie upgrades, refunds, etc).

Opportunities:

- Board members, advisory council and ambassadors to continue following up with sponsors who have not responded to initial Q1 outreach.

4. Support Needed from the Board

- Ensure we remind event attendees to post pictures and comments after each event they attend to drive greater member engagement.
- Continue outreach to current and prospective sponsors.

Women in Financial Markets
Finance Committee Update Report
Date: June 4, 2026

2026 Committee Goals *(including metric(s) to achieve by year end)*
1. Work closely with the Sponsorship Committee to align on fundraising goals and collect sponsorship funds in a timely manner **a.** Target: Minimum: $750K; Stretch Goal: $825K
2. Propose and maintain oversight of WIFM's budget and finances. Work collaboratively with other Committees to support their financial needs **a.** At a minimum meet budgeted revenue & come in at or under the expense budget
3. Develop and implement an investment strategy for excess funds
4. Work with the Leadership Committee on plan to perpetuate the Cassandra Seier Scholarship
5. Assist as needed on a UK legal structure and setup to support WIFM's expansion in the region
6. Ensure completion of all annual tax filings and regulatory reporting to maintain not-for-profit status a. Submit State of Delaware annual filing by March 1st b. Submit IRS 990 and NYS tax filings by November 15

1. Key Activities

Summarize major initiatives and updates since the last meeting:

- All outstanding 2025 receivables have been received except for the $2.5K NASDAQ sponsorship.
- UK bank and Stripe accounts set up to handle payments from the UK. Linking to the CRM platform is in progress.
- Received IRS approval for the extension of the 2025 tax filing. As in previous years, the actual filing will be done by the November 15 deadline.
- Received an additional $1K from Marisol Collazo for the Cassandra Seier Scholarship. These are considered restricted funds and now total $21K.
- Our tax accountants, OJ Flanagan have merged with SAX LLP and fees for tax services will be considerably higher for 2026. We're in the process of considering alternatives.

2. Progress & Impact

Provide concise updates on goals and outcomes:

- Progress:
  - Of the $97K in outstanding 2025 receivables at the beginning of the year, only $2.5K remains outstanding.
  - Through May 29, $160K of the $490K in committed gala sponsorships has received, putting us ahead of prior years in sponsorship collections.

- Impact Metrics:
  - Gala Commitments to date represent 65% of proposed $750K Gala budget goal.
  - Available unrestricted cash (net of reserves) and outstanding 2026 Gala sponsorship commitments provide funding coverage for 85% of the remaining expense budget.
  - YTD expenses continue to be in line with proposed budget.

3. Challenges & Opportunities

- Challenges:
  - Ensuring appropriate accounting, compliance, and governance oversight for the newly established unincorporated association in the UK.
- Opportunities:
  - Developing 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: June 4, 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 is partnering with the Sponsorship and Membership Committee to strategically support growth in 4 regional locations, using events to help women connect in some of the most active financial services hubs: Boston, Chicago, DC, LA.

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
- February - May, virtual : CityCV Board Director series – completed 2 of 4 sessions
- March, virtual : WIFM sponsored Women's History Month series – 4 sessions
- March 4, Sydney: Future of APAC Capital Markets with DTCC speaker
- March 5, NYC : Equinox spin class for WIFM members at Champion and Visionary levels
- April 22, NYC: Generation Love event
- April 30, NYC: Options Group marquee event
- May 14, NYC: Tradeweb marquee event
- May 21, virtual: Board-ready series

Upcoming Events (and Programs) in Progress

- June 10, LA: Bloomberg event
- June 11, Chicago: STAC happy hour

- June 16, NYC: Dechert event
- June 16, London: LSEG marquee event
- June 24, NYC: WIFM conference
- July 23, DC: Wilmer Hale political/policy panel
- July (exact date TBD): Intern event at NYSE
- October 22, NYC: WIFM gala
- November 5, NYC: Nomura marquee event
- TBD Dates, DC: Additional DC-based events
- TBD Date, LA: TCW Marquee event
- TBD Date, Chicago: CME marquee event
- TBD Date, Houston: Bloomberg marquee event

2. Progress & Impact

• Progress: Continued planning for marquee events, planning intern event discussed at offsite, good engagement with regional leads and engaging ambassadors for help with 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
Leadership Committee Update Report
June 4, 2026

2026 Committee Goals ***(including metric(s) to achieve by year end)***
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

- Updates on cohort activity sent to sponsors that have participants in cohorts.
- Notes on those that aren't participating in cohorts also sent to sponsors.
- WIFM conference planned. London also hosting conference.
- Scholarships open for applications.

2. Progress & Impact

Provide concise updates on goals and outcomes:

• Progress: Conferences: Set for WilmerHale on June 25. Conference theme: Markets in Motion: Leading through Uncertainty (keynote; tokenization; political fireside; commodities; private markets)

- Anticipate full attendance. LinkedIn campaign creating buzz.
- Film to kick off, photographer, videographer.

3. Challenges & Opportunities

Briefly outline:

• Challenge: Need a bigger space next year.
Opportunity: Secured DB for next year. Confirming dates.

4. Support Needed from the Board

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

- None identified.

Women in Financial Markets

Marketing & Communications Committee Update Report

Date: June 4, 2026

2026 Committee Goals ***(including metric(s) to achieve by year end)***
1. Drive sustainable membership growth across all tiers while increasing engagement and demonstrating the value of the WIFM community. **Year-End Targets:** • Grow Visionary, Champion, and Insider membership across key markets. • Increase conversion from Insider to paid membership tiers • Strengthen membership engagement through integrated marketing and communications programs • Support WIFM's North Star of serving a global network of 20k members.
2. Events Marketing & Audience Development Develop and execute integrated marketing and communications programs that drive attendance, engagement, sponsorship visibility, and membership growth across WIFM's key events. **Year-End Targets:** • Build a repeatable 360-degree marketing framework for select WIFM events • Increase attendance and revenue for these select events • Integrate membership growth objectives into event marketing campaigns • Establish consistent event branding, messaging, and promotional strategies
3. Brand Content & Industry Visibility Strengthen WIFM's brand and visibility globally through compelling content, thought leadership, and consistent messaging. **Year-End Targets:** • Develop and implement a WIFM messaging and value proposition framework • Launch a sponsor focused value video • Establish a WIFM Speakers Bureau • Expand thought leadership, testimonial, and media initiatives
4. Strategic Partnerships & Expansion Support WIFM's growth through strategic partnerships, sponsorship opportunities, and expansion into key markets and communities. **Year-End Targets:** • Expand relationships with complementary organizations, industry groups, and conference providers • Support growth initiatives in Europe and other priority markets • Strengthen sponsorship visibility and engagement opportunities • Evaluate strategic partnership and affiliation opportunities

Key Activities Since Launch

- Established and onboarded the Marketing & Communications Committee, bringing together professionals across marketing, communications, design, partnerships, CRM, and regional leadership.
- Developed committee priorities aligned with WIFM's long-term growth objectives.
- Launched the first phase of a comprehensive marketing and communications program supporting WIFM's 2026 conference series.
- Activated promotional campaigns for the New York and London conferences across email, social media, video, and member communications channels.
- Began development of a WIFM messaging framework and value proposition to strengthen brand consistency across membership, sponsorship, and event initiatives.
- Initiated planning for a sponsor value video, testimonial program, media outreach strategy, and Speakers Bureau framework.
- Continued evaluation of strategic partnership opportunities to expand WIFM's reach and impact.

Progress

- Marketing and communications campaigns launched for the 2026 New York and London conferences.
- Since launch of conference marketing campaign on May 13, generated 5 new Visionary members, 9 new Champion members, and 75 new Insider members.
- Secured 45 Visionary conference registrations and 34 Champion conference registrations.
- Achieved more than 13,000 social media impressions and nearly 9,000 video views across conference campaign content.
- Conference invitation email campaigns achieved open rates exceeding 30% among Visionary and Champion members. This is double the industry standard of 15%.
- Established foundational workstreams to support a more integrated and scalable approach to marketing, communications, and member engagement.

Challenges & Opportunities

Challenges:

- Balancing the need for rapid execution with the development of a more integrated and scalable marketing framework that can support WIFM's continued growth.
- Budget for design, video, etc. Bari is leveraging her MUFG resources, and this is will not be sustainable long-term. Will need to establish a budget for 2027.

Opportunities:

- WIFM's conferences as a catalyst for membership growth, engagement, sponsorship visibility, and brand awareness.
- Strengthen WIFM's positioning as a leading voice for women across financial services.
- Build a more cohesive and consistent member, sponsor, and event experience through integrated marketing and communications.
- Expand strategic partnerships and geographic reach to support long-term growth objectives.

Board Support Requested

- Continue serving as evangelists for WIFM by promoting membership, conferences, and key initiatives across your networks.
- Identify strategic partnership, sponsorship, and speaking opportunities that align with WIFM's growth objectives.
- Support social media amplification of major WIFM announcements and events.
- Provide feedback on the evolving WIFM value proposition and messaging framework as development progresses.
- Provide, at minimum, a two-week lead time for M&C requests. Bring us into the conversation at the ideation stage.