Women in Financial Markets
Leadership Committee Update Report
September 17, 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

- WIFM conferences in NY (June 25) and London (July 7) were a huge success. New York key wrap-up from Leadership Committee:
    - NY oversold attendance but still had 32 no-shows. We are considering how to price members to incentive coming next year.
    - Conference theme "Markets in Motion" and speakers/panels received good feedback for being topical and engaging.
    - Breaks were appreciated and seemed right-timed, with one being just a social break.
    - Great social media pick up for the conference by WIFM members showing their attendance.
    - Money paid for food, keynote speaker travel expenses and her book put us at a loss and offering sponsors comp tickets and discounted pricing for members. With DB hosting next year's event, we plan to talk about DB paying for more food/reception costs.
- The Leadership Committee cohorts are all meeting with one concern, the low take-up of personal coaching. Leaders of cohorts assessing.
- Scholarships open for applications. We have 12 applications.
- Planning now for all sponsor cohort nominations – deadline Dec. 7
- All cohort end of year activities starting to get planned
- Scheduling Mentorship and Wolfpack end of year gatherings for various cities using Ambassadors.

2. Progress & Impact

Provide concise updates on goals and outcomes:

- All goals are on-track.
- Cohorts have met as expected and emails have gone out where people were not engaged.

- Both NY and London had record attendance at the annual conference
- Cassandra Seir scholarship will be given at $2,500 and parameters are set.

3. Challenges & Opportunities

Briefly outline:

• Challenge: We discussed engagement of Ambassadors on leadership with the Ambassadors. Ambassadors are primarily engaged in mentorship assignment, scholarship initial picking, conference planning/assisting, wolfpack helping with events, etc.

Opportunity: One item Ambassadors said could help and we plan to do is keeping Ambassadors fully engaged early in their tasks for 2027 by providing them with timeline information early to do their tasks.

4. Support Needed from the Board

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

- None at this time.

Women in Financial Markets
EMEA Committee Update Report
Date: September 17, 2026

2026 Committee Goals ***(including metric(s) to achieve by year end)***
1. <u>Events/Leadership</u> 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. <u>Membership/Sponsorship</u> Establish UK legal entity proposal
3. <u>EU Working Group/Nomination Committee</u> 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:

<u>Completed Events:</u>

• **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
• **FIA IDX Breakfast in London** – Jun 17
• **EU Conference in London** – Jul 7

Upcoming Events:

• **Event with Rabobank in Amsterdam** – Sept TBC
• **Event in Milan** – ~~Sept TBC~~ [being pushed to October]
• **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 18th
• **Tokenization Webinar** – TBC
• **ETFs Webinar** – TBC [November?]

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. Initial discussions underway.

Events

• **30** senior women RSVPed for the Derivatives Forum German Dinner
• **627 registered** for the Digital Assets Decoded Webinar, **242 attended**
• **EU Conference:** The inaugural WIFM Europe Conference 2026 was delivered successfully and received very strong attendee feedback. The event performed well across programme quality, speakers, moderation, venue and logistics, and established a strong foundation for future WIFM programming in Europe.

Attendee statistics: The final attendee list indicates strong participation and broad market representation:

- **158 registered attendees**
- **132 attendees on the day**
- **26 no-shows**
- **Attendance rate:** 83.5%

- **No-show rate:** 16.5%

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): **2,374 members**
- Q3 2026 (as of Sept 8): **2,657 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: **+274** new members
- Q3 2026: **+283** 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
  - UK Legal Entity proposal - This structure is under discussion and still underway. Query whether we will be able to establish this by end of year. Need to look at this keeping in mind our overall WIFM structure and goals, as well as creating a future template for other regions such as APAC.
  - We are re-engaging in the Middle East and trying to determine best structure to launch our first event there

- 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

Governance & Nominating Committee Update Report

Date: 9/11/26

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 Month & Year Board members started service and aligned terms
- Confirmed Board member seeking re-election
- Followed up from Offsite: sent Board "WIFM Board Member Selection Process" document which outlines the Nom/Gov Committee process
- Circulated "WIFM Board Prospective Nomination Form" 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)
- Sent Information on 2027 Board nominee, Melissa Stolfi, in advance of Annual Meeting
- Updated and sent WIFM Board Self-Assessment; Collected & summarized results
- Created vote document for Annual Election meeting on Sept 17, 2026
- Updated & reviewed By-Laws; sent to Nomination & Governance Committee

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)
    - 9/8/26
        - Discussed EU Structure
        - Update on revised By-Laws; discussed items for clarification
        - Discussed WIFM Board Self-Assessment status
        - Agreed on items for Vote at the Annual Meeting on 9/17/26
        - Reviewed Terms and Board Members up for reelection in 2026 and 2027
        - Discussed Prospectives & pipeline for 2027

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

Sponsorship and Membership Committee Update Report

Date: September 17, 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:

- Working to confirm last few corporate sponsors for 2026 Gala
- Revisiting paid membership structure based on results since launch; shifting to annual paid structure
- Great feedback from a successful sponsor dinner hosted in New York in July
- Positive feedback received from summer intern events for Sponsoring organizations in NYC and Chicago

2. Progress & Impact

Updates on goals and outcomes:

- 47 organizations have confirmed 2026 sponsorship for a total of $886K, as of Sept 4.
    - Secured 98% of target fundraising goal ($900k), including 3 diamond premier and 9 Platinum sponsors, as of Sept 4.
    - Established sponsor relationship with 8 new firms, including 1 diamond premier
    - Working to confirm 5 remaining 2026 sponsors that will put us over set budget
- Paid membership for 2026 in the US growth (excluding complementary members):
    - Champion tier: 155 (18 added in Jun-Aug 2026)
    - Visionary tier: 78 (23 added in in Jun-Aug 2026)
- Global membership growth across the regions:
    - Q1 2026: 874
    - Q2 2026: 979
    - Q3 2026: 956 (through Sept 10)
- Ongoing focus on the US target growth regions - LA, Chicago, Boston, DC and Houston

3. Challenges & Opportunities

<u>Challenges:</u>

- Revise paid membership model for 2027 ahead of year-end to allow for timely notification to current members and corporate sponsors.
- Establish year-around networking events that will be low effort while providing additional engagement opportunities for members across the US.
- Send out a survey to current Visionary and Champion members (complementary and paid) to seek detailed feedback on the paid membership model.

Opportunities:

- Board members and ambassadors to confirm remaining 2026 corporate sponsors by end of September, ahead of Gala.

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.
- Budget allocated to facilitate year-around networking events across the US.

Women in Financial Markets

Events Committee Update Report

Date: September 17, 2026

2026 Committee Goals
1. 20 events - Americas & APAC (including sponsor benefits)
2. Reduce no-show rate
3. 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 – 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 21, virtual: Digital Assets Decoded webinar
- April 22, NYC: Generation Love event
- April 29, Boston: ISDA Annual General Meeting panel on View from the Trading Floor
- April 30, NYC: Options Group marquee event
- May 14, NYC: Tradeweb marquee event
- May 19, NYC: Equinox - Beats Ride
- June 10, LA: Bloomberg women's buyside network
- June 11, Chicago: STAC happy hour
- June 16, NYC: Dechert event
- June 16, London: LSEG marquee event
- June 24, NYC: WIFM conference
- July 21, Boston: Equinox Beats Ride
- July 22, LA: Equinox Beats Ride
- July 23, DC: Wilmer Hale political/policy panel From Ballots to Balance Sheet
- June/July/August, virtual: Summer Leadership Series - 3 sessions
- July 29: Intern event at NYSE
- July 29: Sponsorship Dinner
- September 9, DC: Prediction Markets, where trading and real life events collide
- September 10, Singapore: The new Power Couple, Human leadership in an AI world

Upcoming Events (and Programs) in Progress

- September 16, DC: The View from the Capitol: Young professionals shaping financial policy in Congress
- September 24, LA: TCW Marquee event (Navigating the next market cycle)
- October 14, Boston: A Wealth of Perspectives (Wellington office)
- October 15, NYC: TBD event at BNPP's office
- October 21, Houston: Bloomberg marquee event
- October 22, NYC: WIFM gala
- October 26, NYC: WIFM Speed Networking event (DB office)
- October 28, Chicago: CME marquee event, Beyond the Ledger: Future of Digital Assets and Tokenization
- November 4, NYC: Nomura marquee event
- November 23, NYC: BofA marquee event
- TBD: Marquee events for DTCC, ICE, MUFG

2. Progress & Impact

- All 2026 Marquee events have been completed or are scheduled (3 sponsors not planning an event this year).

- Intern event was a success with good engagement across many sponsoring organizations.
- Brainstorming additional networking opportunities for members that are lower effort to plan and execute than traditional content-based programs.

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 2027 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. Starting in 2027 we will be asking each board member to sign up to attend a minimum number of events per year.

Women in Financial Markets

Finance Committee Update Report

Date: 09/17/26

2026 Committee Goals *(including metric(s) to achieve by year end)*
6. 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: $900K (originally $825K)
7. 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
8. Develop and implement an investment strategy for excess funds
9. Work with the Leadership Committee on plan to perpetuate the Cassandra Seier Scholarship
10. Assist as needed on a UK legal structure and setup to support WIFM's expansion in the region
11. 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:

- Working with SAX LLP on the 2025 tax filing. As in previous years, the Finance Committee will review and sign off on behalf of the Board. Submission deadline is November 15. This new firm is proving to be very useful from a resource/guidance perspective so while their fees will be higher than OJ Flanagan, we believe it's worth the value for now.
- Working on fine tuning the full-year forecast and starting work on the 2027 budget.
- UK legal structure work continues. The CIO structure being considered requires a level of independence from the U.S. entity. We are in the process of doing additional due diligence the limitations that creates and the associated compliance requirements.
- The draft investment policy will be ready for discussion and approval at the November Board meeting
- Stripe payments is now linked to our new Auction platform ahead of the upcoming U.S. Gala.

2. Progress & Impact

Provide concise updates on goals and outcomes:

- Progress:
  - July YTD revenue plus committed but yet paid gala commitments total ~$902K. This puts us 12.6% ahead of 2026 full year Gala budget of $801K.
  - Gala sponsorship as of Sept. 10th is $886K, 18% ahead of budget. We expect to hit and likely exceed our aspirational sponsorship goal of $900K.
  - FY revenue is estimated surpass the $1mn mark and FY expenses to come under budget by ~10%.
  - Transferred London Conference proceeds to UK bank account. Balance as of August 26 was GBP 2.4K. Monthly fees are GBP 4.25 (~$5.75)

- Impact Metrics:
  - Of the $886K in 2026 Gala sponsorship commitments, we received 55% of it through Sept 10th.
  - Restricted funds for the Cassandra Seier Scholarship total $21.2K. We will be awarding a $2.5K scholarship in 2026.
  - As of July 31st, unrestricted cash, net of reserves, combined with projected additional cash inflows, is expected to more than fully fund all remaining 2026 expenses.

3. Challenges & Opportunities

- Challenges:
  - Ensuring appropriate accounting, compliance, and governance oversight for the WIFM UK entity.
  - We will need to write-off our first sponsorship due to non-payment (NASDAQ's $2.5K sponsorship of the 2025 Singapore FIA breakfast).
- 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:

- Assistance in chasing outstanding 2026 sponsorships with the goal of collecting it all before the end of the year.

Women in Financial Markets

Marketing & Communications Committee Update Report

Date: September 17, 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. **Year-End Targets:** • Build a repeatable 360-degree marketing framework for select WIFM events • Increase attendance 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 via local partnerships • Strengthen sponsorship engagement opportunities within the respective sponsor companies

Key Activities Since Launch

- Established and recruited the Marketing & Communications Committee, bringing together ten professionals across marketing, communications, graphic design, Martech and digital, and brand expertise.
- Assigned roles / responsibilities to each committee member, including marketing and communications leads for US / APAC and for Europe.
- Developed committee priorities aligned with WIFM's long-term growth objectives.
- Launched a comprehensive marketing and communications program supporting WIFM's 2026 conference series across all digital channels including email, website, and social media.
- 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.
- Initiated planning for 20th year anniversary full-year program.

Progress

- Drafted a WIFM Brand & Messaging Playbook to provide Board and Advisory Council members, ambassadors, staff, and designated spokespeople with a clear and consistent foundation for how we speak about WIFM. The comprehensive document covers the WIFM story and core messaging, why join WIFM, why sponsor WIFM, messaging by audience, our mission and vision, brand promise, positioning statement, elevator pitch, and much more. Status: under review.
- Gala promotion is underway, supported by an established look and feel for the New York and London galas, with distinct regional color palettes consistent with the approach used for the conferences. A series of promotional activities will build momentum, including footage from last year's galas, sponsor spotlights, and additional content. Opening video for galas in currently in production.
- Established the foundation for the WIFM Speakers Bureau by consolidating several years of WIFM speakers into a comprehensive database capturing their organizations, areas of expertise, speaking topics, LinkedIn profiles, and other speaking engagements. Next steps include gathering missing information through direct outreach and launching a website submission form for individuals interested in being considered for the Speakers Bureau.
- Initiated discussions with CRM providers to identify the platform best positioned to support WIFM's growth in the years ahead. The goal is to select, implement, and fully integrate a new CRM before the current EveryAction contract expires in October 2027, ensuring a seamless transition.
- Regional M&C leads have begun developing plans to support regional growth priorities.
- Planning is underway for a full year of marketing activities celebrating WIFM's 20th anniversary. Visuals, including the logo and tagline, "20 Years of Unstoppable Momentum," are ready.
- Designed new WIFM PP slides, templates for social media, and templates for email communication.
- Post-conference promotion, beginning in late August generated approximately 200 new LinkedIn followers in three weeks.

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 will not be sustainable long-term. Will need to establish a budget for 2027.

Opportunities:

- Launch a monthly global events calendar email providing members with an at-a-glance view of upcoming WIFM events across all regions. Launch in December.
- Launch a quarterly digital newsletter in January 2027 that will live on the WIFM website and be emailed to members --- will feature recaps of recent activities, upcoming opportunities, member profiles, and recognition of promotions and new roles.
- Shift event communications from targeted regional distribution to the full global membership base, increasing visibility into the breadth of WIFM activity, enabling members to participate while traveling, and encouraging them to share relevant events with colleagues and friends in other locations. Appropriate registration and access controls will be established where needed.

Board Support Requested

- Continue serving as evangelists for WIFM by engaging with WIFM LinkedIn posts.
- Provide feedback on the evolving WIFM brand 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.