



ASSOCIATION OF AFRICAN AMERICAN
FINANCIAL ADVISORS
SHAPING THE FUTURE

THE ASSOCIATION OF AFRICAN AMERICAN FINANCIAL ADVISORS PRESENTS:

WOMEN'S IMPACT INITIATIVE NETWORK

WIIN

BEYOND BOUNDARIES

INSPIRING WOMEN TO LEVEL UP TO REACH NEW HEIGHTS IN WEALTH MANAGEMENT

CHICAGO, IL | June 19th-20th

WELCOME MESSAGE

Dear Attendees,

I am delighted to welcome you to the inaugural Quad- A WIIN Conference 2024. This gathering is a cornerstone for those of us committed to enhancing the representation and success of women in the Financial Services Industry.

This conference embodies that vision, bringing together some of the brightest minds and most dedicated female and male professionals in the industry. Having supported and witnessed the growth of countless advisors, I am confident that the insights and connections you gain here will be invaluable.

The sessions planned are geared towards equipping you with the tools to expand your network, increase your net worth, and break through the glass ceilings you encounter.

Thank you for being here and for contributing to the vibrant future of our industry. Enjoy the conference and let us make these couple of days together transformative

Dr. Alex David

Interim Chairman of the Board

Independent Contractor Division Raymond James



WELCOME MESSAGE

Welcome to WIIN!

I am thrilled to welcome you to this year's WIIN Conference. As a woman who has been navigating the industry for over two decades, I understand the unique challenges and opportunities that come with our territory. This conference is a culmination of our collective experiences and aspirations—a platform designed not just for learning, but for growing and thriving together.

My journey in this field has been both challenging and rewarding. I've witnessed remarkable transformations and have had the pleasure of seeing many women rise to remarkable heights. That's why I am particularly excited about the "EmpowerHER" session, where we delve into the transformative roles women advisors play within our industry.

This conference is close to my heart because it is about more than just financial advice; it's about empowering each other in every stride we take. Let's use this time to connect, learn, and inspire. Here's to making this conference as enriching for you as it promises to be.

I'm looking forward to enlightening conversations and transformative experiences!

Sheena Gray

Interim CEO

Association of African American Financial Advisors (AAAA)



ABOUT



The ASSOCIATION OF AFRICAN AMERICAN FINANCIAL ADVISORS (AAAA) is a nonprofit financial organization that was created to address the needs and concerns of African American Financial Advisors and affiliated Professionals. As a membership-based organization, we are committed to continuing our work uplifting communities impacted by adversity, lack of opportunities, and industry gaps.

We work in alliance with leading financial institutions and firms, academic leaders at Historically Black Colleges and Universities that support finance degree programs, legislative and regulatory bodies, and lastly, consumer interest organizations.

AAAA was founded as a means to foster the value of career opportunities within financial services and advance the profession of Black/African Americans in the industry. We are committed to creating equitable opportunities for our members and appreciate you joining us.



ABOUT WIIN

The Women's Impact Initiative Network, within the Association of African American Financial Advisors (AAAA), was formed to serve the vital purpose of addressing the underrepresentation of women in the wealth management sector of the Financial Services Industry.

Empower Women in Wealth Management

WIIN is driven by the Financial Services industry's historical gender disparities and the urgent need for a more diverse and inclusive workforce where there is shared equity and inclusivity. By fostering an environment of empowerment, continuous learning, and collaboration, this network aims to reshape the industry landscape and create new opportunities for women, particularly in the field of wealth management.

This initiative strives to elevate the number of licensed Black/African American women in C-Suite roles and aims to attract and retain a higher presence of women in the industry.



WIINs overarching goal is to generate heightened interest from existing professionals in the industry, career changers and next generation talent from colleges and universities, as it relates to the topics we explore and showcase.



WIIN highlights the achievements of female industry professionals, stimulate demand for increased content pertaining to women in wealth and asset management, and enhance mentorship and sponsorship opportunities.



Convene at 311 West Monroe Street Located in The Loop neighborhood of downtown Chicago, Convene 311 W Monroe destination pays homage to the city's rich industrial and musical history by interweaving modernist architecture with an interior design reminiscent of Chicago's underground jazz scene.

The space exhibits warm hues through ambient lighting with rich pops of color and intricate detailing throughout. Convene 311 W Monroe is located between South Wacker Drive and South Franklin Street in the Loop near Washington/Wells Station and Quincy Station.



FLEXIBLE MEETING
& EVENT SPACE



STATE OF THE ART
TECHNOLOGY



HIGH SPEED
WIFI



2024 WIIN REGIONAL CONFERENCE



DAY 1

Wednesday, June 19th 2024

The Emily Hotel: 311 N Morgan St, Chicago, IL 60607

WELCOME RECEPTION - CHARCUTERIE CHIC

6:00 PM - 7:00 PM

Join us for "Nibbles & Network: Charcuterie Chic," an engaging evening where networking meets gastronomy. This concise event is designed to spark connections in a cozy atmosphere, highlighted by a live charcuterie demonstration. Witness the art of crafting the perfect charcuterie board, learning tips and tricks from a culinary expert, while you mingle and exchange ideas with fellow professionals. Enjoy the unique blend of delicious bites and meaningful conversations, making every interaction as rewarding as the flavors on your palette. Don't miss this chance to enrich your professional network and culinary skills in one delightful evening.

AAAA SOCIAL EVENT: JANET JACKSON CONCERT (VIP SUITE, INVITE ONLY)

8:00 PM

Join us for an unforgettable night of music and networking at the iconic United Center in Chicago, IL. AAAA is thrilled to invite select attendees to our exclusive booth for a special evening featuring the legendary Janet Jackson. This event promises a blend of thrilling live entertainment paired with the opportunity to connect with like-minded individuals in a dynamic setting.

DAY 2

Thursday, June 20th 2024

The Convene: 311 W Monroe St, Chicago, IL 60606

REGISTRATION

7:00 AM - 10:00 AM

BREAKFAST

7:00 AM - 8:30 AM

EVENT KICK OFF (WELCOME)

8:45 AM - 8:50 AM

2024 WIIN REGIONAL CONFERENCE



DAY 2

Thursday, June 20th 2024

EMPOWERHER: UNVEILING THE POWER OF WOMEN ADVISORS AND CLIENT EMPOWERMENT

8:50 AM - 9:40 AM

Description: "EmpowerHER: Unveiling the Power of Women Advisors and Client Empowerment" is an insightful and inspiring exploration into the transformative role that women advisors play within the financial services industry and beyond. This comprehensive guide illuminates the unique strengths and perspectives women bring to financial advising, showcasing how they are reshaping the landscape of client relationships, financial planning, and empowerment. "EmpowerHER" serves as both a celebration of the accomplishments of women advisors and a practical handbook for those aspiring to make a significant impact in the lives of their clients.

Moderator: Clara Sierra, Moody's, Senior Director

Speakers: Tammia Rowe, JP Morgan, Market Director of Wealth; Cary Carbonaro, ACM Wealth Sr VP, Director of Women and Wealth; Nneka Constantino, Merrill Lynch, Vice President, Senior Financial Advisor; Marie Taylor, Edward Jones, Edward Jones -Financial Advisor

SESSION BREAK

9:40 AM - 9:50 AM

BE INTENTIONAL: CULTIVATING YOUR PROFESSIONAL NETWORK

9:50 AM - 10:40 AM

Description: In the fast-paced world of wealth management, the power of a supportive professional network cannot be overstated. This session is dedicated to the art and science of building meaningful connections within the industry. This interactive workshop will guide attendees through the process of identifying potential executives, allies, and collaborators who align with their professional goals and values. Participants will learn strategies for reaching out, establishing rapport, and nurturing relationships that are both supportive and mutually beneficial. Through practical exercises and real-world examples, attendees will leave equipped with the tools and confidence to intentionally grow their network and find their village in the wealth management community. This session emphasizes the importance of quality over quantity in networking, and how intentional actions can lead to lasting professional relationships and career opportunities.

Moderator: Sheena Gray, AAAA, Chief Administrative Officer

Speakers: Gabriela Ramirez, UBS, Executive Director, Wealth Management, Head of Field and Strategic Hiring; Lauren Burthey, Homrich Berg, Director; Shevawn Adams, RBC, Senior Manager Field Diversity Enablement; Dayana Velasco, Wells Fargo Advisors, Senior VP

2024 WIIN REGIONAL CONFERENCE



DAY 2

Thursday, June 20th 2024

MARKET MAVENS: MAKE YOUR NET WORK YOUR NET WORTH

10:50 AM - 11:40 AM

Description: Join us as we explore the powerful strategy of leveraging your network to boost your net worth within the wealth management industry. In this engaging session, you'll gain valuable insights and practical tools to elevate your professional relationships, turning them into a key asset in your financial planning. Discover how to make your network work for you, directly contributing to your overall net worth.

Moderator: *Cynthia Hoes, Nationwide Financial, Associate VP*

Speakers: *Iliana Levy, Morgan Stanley, Executive Director Market Manager; Jennifer Johnson, Wells Fargo Advisors, Managing Director, Market Leader - Illinois; Naomi Lynn, Wells Fargo Advisors, Branch Manager, Executive Director*

PEER SHARING + NETWORKING

11:45 AM - 12:25 PM

LUNCH AND LEARN - SPONSORED BY WELLS FARGO ADVISORS

12:30 PM - 1:30 PM

Description: Women and Wealth - Mind the Challenges: They Lead to Your Success reviews the strengths and challenges faced by women investors, the gaps in retirement savings, and how women invest. This presentation also shares some insight about perceptions versus reality, key steps to becoming a better investor and what actions to take in the present to enjoy the benefit in the future.

Speakers: *Tracey Tynes Horlback, CRC®, ACC - Executive Director and Sheila Jacobs, CFP®, CAP® - Managing Director*

2024 WIIN REGIONAL CONFERENCE



DAY 2

Thursday, June 20th 2024

PUT YOUR MONEY TO WORK: BUILDING WEALTH STRATEGIES FOR WOMEN BY WOMEN

1:35 PM - 2:25 PM

Description: Women face unique financial challenges and opportunities. This session focuses on developing wealth strategies tailored to the needs of women clients. Experts will cover topics from investment planning to retirement and estate planning, emphasizing communication skills and empathy to build strong, trust-based relationships with clients

Moderator: DawnMarie Montgomery, Thrivent, Director, Diversity, Equity and Inclusion;

Speakers: Danielle Darling, Resource One Advisors, Financial Advisor; Nesha Zeigler, Advocacy Wealth Management, LLC, Managing Director; Cathy Walker, RBC Wealth Management, Sr Manager, Trustee & Philanthropic Solutions

THE FUTURE OF WEALTH: EMBRACING AI, TECHNOLOGY AND INNOVATION

2:35 PM - 3:25PM

Description: In a rapidly evolving industry, staying ahead means embracing change. This session dives into the latest technological advancements and innovations reshaping wealth management. From fintech to digital assets and beyond, learn how to leverage these tools to enhance your services, streamline operations, and deliver exceptional client experiences.

Moderator: DeAnna Ingram Jones, NEPC. LLC, Consultant

Speakers: Lacy Garcia, Willow, Founder/CEO; Leila Shaver, My RIA Lawyer, Founder; Valarie Vest, Cambridge Investment Group, Executive Vice President and Chief Experience Officer;

BREAKING THE GLASS CEILING: STRATEGIES FOR ADVANCEMENT IN WEALTH MANAGEMENT

3:35 PM - 4:25 PM

Description: This session will explore the paths to leadership for women in wealth management. Industry veterans and trailblazers will share their journeys, offering practical advice on navigating career advancement, overcoming barriers, and leveraging mentorship and networking opportunities. Attendees will leave with actionable strategies to elevate their careers to the next level.

Moderator: Laura Stone, JP Morgan Wealth Management, Regional Director of Wealth

Speakers: Atricia Roberts, CURO Wealth, COO / Partner; Julie Ragatz, Carson Group, VP, Next Gen & Advisor Development Programs; Libet Anderson: Concourse Financial Group Securities, President

2024 WIIN REGIONAL CONFERENCE



DAY 2

Thursday, June 20th 2024

WELLNESS AND WORK – LIFE HARMONY FOR WOMEN IN WEALTH

4:35 PM – 5:35 PM

Description: Mastering the Motherhood/Work Balance" is specifically designed for executive women in finance who are navigating the challenging yet rewarding journey of balancing a high-powered career with motherhood. This session offers strategies for managing stress, avoiding burnout, and fostering a healthy work life balance.

Moderator: Shaakira N. Mason-Holloway, J.P. Morgan Wealth Management, Market Director, Executive Director

Speakers: Libet Anderson: Concourse Financial Group Securities, President; Kara Hughes, YCharts, VP of Marketing; Linda Reeves, Merrill Lynch, Director, Business Development Manager

AAAA NETWORKING RECEPTION (SPONSORED BY J.P. MORGAN WEALTH MANAGEMENT)

5:40 PM – 7:40 PM

HOW IS AAAA PROACTIVELY SERVING ITS MEMBERS?

1. AAAA collaborates with sponsoring and partnering firms to enhance the demand for Black/African American financial professionals and promote their inclusion in pivotal decision-making policies.
2. AAAA offers comprehensive practice management support to licensed Black/African American financial professionals across different generations, including Millennials, Generation X, Baby Boomers, and the Silent Generation.
3. We work to enhance the well-being of the Black/African American community in America through AAAA's client Symposium initiatives. These Symposiums are focused on financial wellness and financial planning; both aimed at improving financial awareness and overall financial health of the Black/African American Community.

