

2020 calendar of events



January



STRATEGIC NETWORKING & CAREER MANAGEMENT (MEMBERS ONLY)

January 28 – Merion Cricket Club, Haverford PA

The business world is matrixed. Knowing your colleagues and clients is important but reaching out beyond the daily comfort zone of work can drive new career and personal growth. Jane Marcus, Senior Client Partner at Korn/Ferry International will share with members her career management strategies and approaches to relationship-based networking.

February



DELIVERING COMPELLING PRESENTATIONS

February 27 – Aberdeen Standard Investments, Philadelphia PA

Effective presentations can elevate the profile of your latest project or lead to a promotion. Rose Galloway of Parsons Hill Group will outline the top three guiding principles for effective presentations and provide concrete steps you can take to improve your own performance.

April



GET CONFIDENT ON VIDEO

April 23 – WIN Webinar - 4:30 Zoom

Dr. Laura Sicola, Founder, Vocal Impact Productions, will lead WIN members in a conversation on how to use camera angles and lighting, how to master your platform and more. We hope after this program you will feel more confident and empowered and ready for your next virtual meeting.

May



MASTERING TODAY'S CHALLENGES (MEMBERS ONLY)

May 2 - Virtual Coffee Hour - 9:30 Zoom

Macroeconomic trends impact many facets. From the profitability of our industry, growth of personal assets and the political landscape. What does the outlook look like for 2020 and beyond and what is behind it? A panel of industry experts will address their perspectives on monetary policy, trade and a look at the year ahead.



CREATE AN IMPACTFUL BRANDED LINKEDIN PROFILE

May 14 - WIN Webinar - 4:30 Zoom

In this workshop, our presenter, Anne Pryor, Top LinkedIn Strategist and Trainer, and CEP Priority Partnership, will share techniques to create an impactful, branded LinkedIn profile that will help you find and create meaningful connections to grow your business network and brand.



VIDEO CONFERENCES THAT GET RESULTS

May 21 – WIN Webinar - 4:30 Zoom

Now that you know the inside scoop on how to look, sound and feel more confident using camera angles, lights, and other tools, it's time to get down to business! WIN is excited to offer the second part of a webinar with Dr. Laura Sicola, Founder, Vocal Impact Productions.

June



SERVANT LEADERSHIP

June 24 – Host SEI - 4:30 Virtual Program

A servant leader shares power, puts the needs of the employees first and helps people develop and perform as highly as possible. Learn how putting both a team and the customer first can benefit your business. Rhonda Cook, Chief Risk Officer and graduate of the US Military Academy at West Point will share her perspectives on leadership excellence.

July



FROM PRIVILEGE TO PROGRESS

July 29 - WIN Webinar - 4:30

Melissa DePino and Michelle Saahene met at Starbucks in Philadelphia on April 12, 2018. They connected after witnessing two innocent black men being arrested for not buying a coffee. Michelle was the first person to speak up, and Melissa tweeted the video, which went viral with over 13

million views. Melissa and Michelle continue the conversation they started that day through social media campaigns and as speakers who create awareness and inspire action toward racial justice.

August



SUMMER SOCIAL, A MEMBER & FAMILY-ONLY EVENT

August 19 - Virtual Social - 4:45

We are thrilled to announce that the annual WIN Summer Social will take place (albeit virtually) this year! Our host location this year will be Sweet Farm in Half Moon Bay, California. Sweet Farm is the first non-profit sanctuary in the world to address the global impacts of factory farming across animals, the plants and the planet. Refreshments are BYO and your families are invited to join us at the start of the event for the farm tour.

September



GENDER LENS INVESTING

September 15 - Host Glenmede Trust Company – 4:30 Virtual Program

Gender lens investing strategies incorporate benefits to women and girls into analysis and decision-making. Its goal is to profitably invest in firms that help advance gender issues and equality without sacrificing financial returns. Please join us for a panel discussion on the impacts and opportunities of Gender Lens Investing.



ELECTIONS AND GOVERNMENT: INVESTING IMPACTS

September 24 - Host Hartford Funds – 4:30 Virtual Program

Elections and policy changes can have a significant effect on the nation's economic climate. In this session, we'll offer a Presidential election outlook, as well as evaluate how recent policy updates, such as ESG disclosures, activist investing, and board diversity can influence the investing landscape.

October



COURAGEOUS LEADERS

October 13 - Host Lincoln Financial Group - 4:30 Virtual Program

Lincoln Financial, a long-time WIN sponsor will host two speakers in a TED-talk like format on career evolution. Amber Williams, VP of Client Investment Strategies at Lincoln Financial and Daniela Mardarovici, Co-Head US Multisector/Core Plus Fixed Income at Macquarie Investment Management will share their individual journeys – from defining moments to lessons that helped shape their decisions and their opportunities.



CAREER CAROUSEL FOR YOUNG PROFESSIONALS

October 28 - WIN Program - 4:30 Virtual Program

Join us and four panelists from across various functions of financial services to learn more about some of the career paths available to you. The first 45 minutes will be dedicated to a moderated panel with pre-determined questions, and the last 15 minutes will be an opportunity for audience members to ask questions.

November



PA CONFERENCE FOR WOMEN

November 11 - Philadelphia Convention Center - Virtual Program

The conference includes a full calendar and spectrum of sessions that will inspire creativity and action both personally and professionally. Ticket registration this year will be directly from PA Conference for Women.



THE COVID EFFECT: A PANEL DISCUSSION ON COMMUNITIES, ECONOMY, INVESTMENTS

November 12 - Host FS Investments – 4:30 Virtual Program

A panel of experts will discuss COVID -19's financial impact in our homes, our communities and our world.

December



ANNUAL HOLIDAY PARTY (MEMBERS ONLY EVENT)

December 3 - Flemings Prime Steakhouse – Radnor PA

Join members of WIN for our most festive networking event of the year. Enjoy cocktails, hors d'oeuvres and merry company while we celebrate the holiday season.
