



PARTNERS FOR EXCELLENCE

COLLABORATIVE. STRATEGIC. INNOVATIVE.



MISSION:

ATTRACT
WOMEN.

DEVELOP
POTENTIAL.

ADVANCE
CAREERS.

GROWING STRONGER SINCE 1936

Women in Insurance & Financial Services (WIFS) is an association of insurance and financial service professionals working together to attract, develop and advance women in our industry. We champion career opportunities, provide leadership development and strive to change the face of the profession.

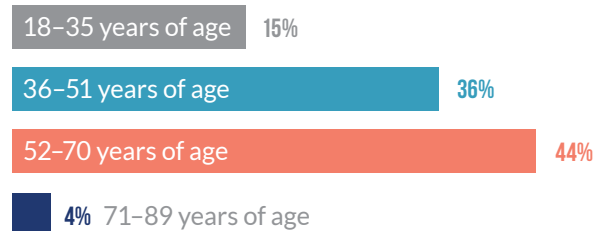
Since 1936, we have provided a forum to build and grow peer-to-peer relationships, intellectual capital and professional skills. Our vision is to be the global change leader inspiring women to achieve their dreams.

WIFS offers a multitude of engagement opportunities for our members, including monthly educational programs, local chapters, a twice-yearly mentorship program, the annual National Conference, leadership development opportunities, an initiative to attract newcomers to the industry called Project '36, a blog and a semiannual magazine.

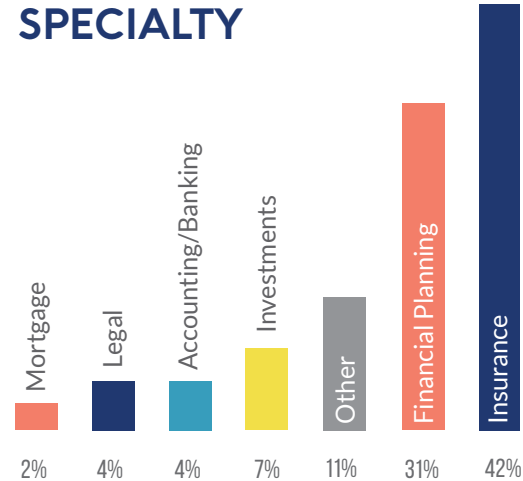


OUR MEMBERS

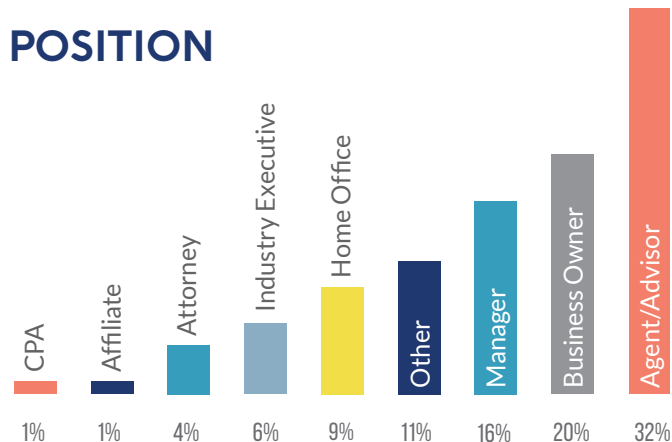
ENGAGING SIX GENERATIONS



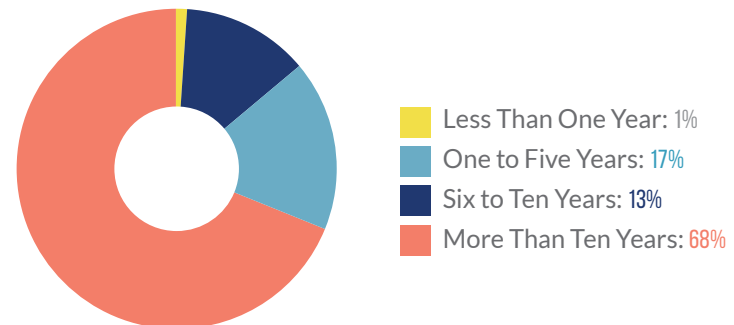
SPECIALTY



POSITION



YEARS IN INDUSTRY



MEMBER CONNECTION BOOSTS PROFESSIONAL DEVELOPMENT

“Whether you are exploring your growth trajectory as a person giving back to the community or as a changemaker making an impact in business, finding yourself within the WIFS community is easy. You are **surrounded by like-minded people** and thought leaders who think big and foster those ideas.”

– Sue Kuraja, Vice President/Brokerage Director, MassMutual

“Engagement with WIFS is important because it is where **women come together as their authentic, powerful selves** to learn from and support one another.”

– Lucila Williams, CFP, Founder/President, The Intentional Advisor,
President/Financial Advisor, Lotus Financial Partners

“**WIFS Conference is a valuable industry event** where remarkable individuals come together from all backgrounds and tenures to collaborate, learn, and inspire one another. The energy and relationships that are formed at this event are a true asset to our profession.”

– Tammy Robbins, Executive Vice President/
Chief Business Development Officer, Cambridge Investment Research

“I found the WIFS Conference to be **the best conference I have ever attended.**”

– Ron Bertke, CLU, LUCTF, Regional Marketing Director, Penn Mutual





PARTNERS FOR EXCELLENCE

Our program provides **broad industry exposure** and is focused on the future of financial services based on consumer and industry data. As a Partner, you are acknowledging these changes and publicizing your **advocacy for women** in the profession.

1

MAXIMIZE OPPORTUNITY

Women control 51% of consumer spending, which makes up \$20 trillion in the market, and they prefer to work with female advisors. The challenge: Women represent only 35% of the workforce. Attracting women is critical to success; our attraction initiatives capitalize on the opportunity.

3

ACHIEVE YOUR STRATEGIC GOALS

Collaborate in conversations among association leaders and partner executives to identify goals, establish success metrics and help create tailored approaches. Leverage the partnership to achieve your strategic goals to attract, develop and advance women.

2

DEMONSTRATE YOUR COMMITMENT

Support the delivery of professional development and advancement through WIFS programs including monthly webinars, peer study groups, National Conference and a first-class mentoring program.

4

FOSTER INDUSTRY COLLABORATION

As the voice for women in the profession, WIFS Leadership actively engages with industry organizations, associations, media and education providers.

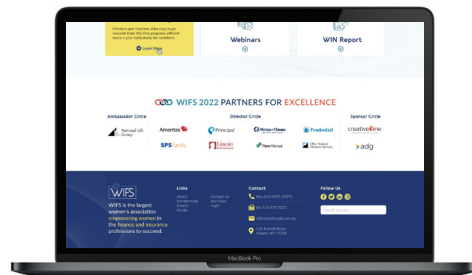
VISIBILITY TO SHOW YOUR COMMITMENT

ANNUAL EXPOSURE METRICS

Be seen as a **thought leader** that supports women through **inclusion in** internal and external association **communications. Expand your reach** with features in member collateral, on the WIFS website, on WIFS social channels and at industry events.

400,000+ IMPRESSIONS DELIVERED ANNUALLY VIA:

- Member email inclusions
- Webinar mentions
- AdviseHER
- National website
- Social media
- Membership materials



AdviseHER & LeadHER

The award-winning WIFS eMagazine provides expert insights on leadership, technology and professional development to a targeted distribution list of more than 1,000 members, prospective members, media outlets, industry organizations, associations, partners and sponsors. The LeadHER blog features hot topics impacting women in the profession and important industry news.

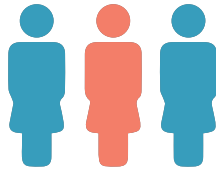


STRATEGIC PROGRAMS THAT DRIVE RESULTS



ATTRACTION

WIFS is committed to attracting **every generation of women** and **individuals pursuing career changes** to the profession. Receive **recognition** in our “Why the Career” promotion, **leverage the exclusive opportunity** to co-brand our career attraction brochure and feature a video message from your CEO on our website.



COLLABORATION

WIFS **actively engages** with **industry-leading** companies, organizations and educational institutions to attract, develop and advance women. Partners are kept abreast and presented with **unique opportunities** to participate in **evolving, cutting-edge thought leadership and initiatives to advance the profession.**



PROFESSIONAL DEVELOPMENT

We offer **custom programs** that support **staff development.** Members benefit from a **first-class mentorship program,** monthly education programs, study groups, **leadership development** programs, **webinars,** an annual national conference, monthly blogs, and our AdviseHER eMagazine.



VISIBILITY

Be seen as a **thought leader** who supports women in the profession by **leveraging inclusion** in internal and external association communications. **Expand your reach** with features in membership collateral, on the WIFS website and at industry events.

AN INVESTMENT THAT DELIVERS

RECOGNITION

Be **recognized for your dedication** to the attraction, development and advancement of women as a WIFS Partner for Excellence. Partners receive **exclusive access** to the Partner for Excellence logo for use in electronic and print communication. Co-branded versions of our career attraction brochure are also provided to **support company attraction initiatives**.

We offer varying levels of partnership. Partner at the level that **aligns with your strategic goals** to support women in the profession.



2023 WIFS PARTNERS FOR EXCELLENCE BENEFITS	Leadership \$55,000	Executive \$40,000	Ambassador \$30,000	Director \$20,000	Affiliate \$10,000
ATTRACT					
"Project '36" Annual In-Person Meeting Sponsor	✓				
"Next Gen" Webinar Series	2 webinars	2 webinars			
DEVELOP					
Main Stage Conference Speaker Sponsor (15 min. stage time)	✓				
WIFS Leader Available for Partner Program/Event (15–60 min. speaking/presentation)	✓	✓	✓	✓	
Webinar Topic Sponsor and Host	5 webinars	4 webinars	2 webinars	1 webinar	
ADVANCE					
Member of WIFS Industry Education Committee/Panel Quarterly	✓	✓	✓	✓	
Big Idea (<i>Sponsor Spotlight</i>) at Conference	✓	✓	✓	✓	
eMagazine Article(s)	2 articles	1 article			
Allowance for Blog Articles	5 articles	4 articles	2 articles	1 article	
CORPORATE					
Brand Visibility — Print and Digital	✓	✓	✓	✓	✓
Partner for Excellence Logo	✓	✓	✓	✓	✓
Complimentary Booth at WIFS Conference	✓	✓	✓		
WIFS Program Metrics/Reporting	✓	✓	✓	✓	✓
WIFS Sponsor Badge for Social Media	✓	✓	✓	✓	✓
Web Banner on WIFS Website for One Year	✓	✓	✓	✓	✓
Complimentary WIFS Memberships	30 memberships	20 memberships	10 memberships	5 memberships	
Complimentary Conference Registrations	6 registrations	4 registrations	2 registrations	1 registration	
Discounted Conference Registrations	20 registrations	15 registrations	10 registrations	5 registrations	

COLLABORATIVE. STRATEGIC. INNOVATIVE.

When women come together, awesome things happen. WIFS is changing the face of the profession.





LET'S EXPLORE PARTNERSHIP

866.264.WIFS

office@wifsnational.org

wifsnational.org



136 Everett Road | Albany, NY 12205

866.264.WIFS | office@wifsnational.org

wifsnational.org