

# What WE Are Doing

WOMEN IN ETFs

Dear Members,

Thank you for joining Women in ETFs! You are among our 700 initial members that we have welcomed in the six months since the official launch of our organization. 2014 has been an amazing year for WE - in the world of ETFs, a product with this fast a start would be heralded as a huge success! We are excited to envision what lies ahead for WE members and for the ETF industry as it benefits from the engaged and connected women involved in Women in ETFs.

We are pleased to share the first Quarterly WE Newsletter! This issue will provide a recap of what WE has been up to in 2014. Many notable events and initiatives have taken place such as the formation and launch of regional and country chapters, social and philanthropic events, media coverage and more! At each of the seven chapter launches, the energy and enthusiasm for the possibilities for the organization has been so impressive.

We are gearing up to start 2015 with a number of exciting initiatives, which we plan to keep you informed of through member communication and our new website. The new WE website will be introduced at our 2nd Annual WE Breakfast in January at the Inside ETFs Conference. The website will have information on membership, events, careers, and sponsor information. Each city and country chapter will have its own section, including how you can get more involved.

Last but not least, we want to thank law firm, Katten Muchin Rosenman, for their assistance on setting up the legal structure of Women in ETFs and for Jamie Nash and Anny Zhu for putting together this newsletter.

Wishing you happy holidays! Please do contact us at [board@womeninets.com](mailto:board@womeninets.com) with ideas and feedback.

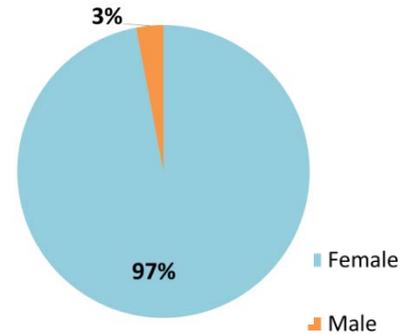
Joanne Hill & Sue Thompson  
Co-Presidents of Women in ETFs

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\* Click on the links above to be redirected to WE's website

## GENDER OF MEMBERS

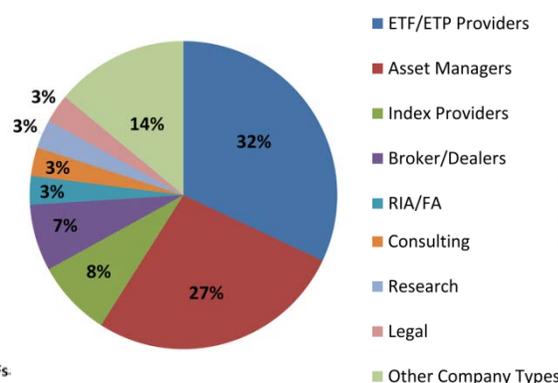


## WE Membership Statistics

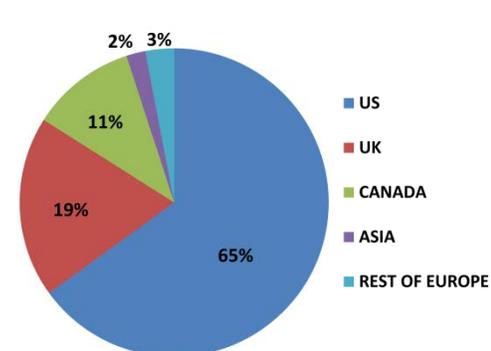
### CAREERS REPRESENTED



### COMPANIES REPRESENTED



### REGION OF MEMBERS



### Chicago Regional Kick-off September 17, 2014



The Chicago WE launch event was held at Chicago's acclaimed Little Goat Restaurant with a turnout of *106 attendees*. The Lead sponsors of the event were BlackRock and PowerShares. **Sue Thompson** representing BlackRock & **Laura Grusczyński** representing PowerShares welcomed everyone before Celebrity Chef & Owner of Little Goat, **Stephanie Izard**, spoke to the group.

### New York Regional Kick-off - "ETFs Drivers of Change" October 27, 2014



The New York WE launch "ETFs: Drivers of Change" was held at the Classic Car Club in downtown NYC with a turnout of *150 attendees*. **Brad Katsuyama**, Founder and CEO of IEX was the keynote speaker. The event attracted a diverse group of ETF industry participants as well as many current and future WE members. **Sponsors were Susquehanna, SSGA, and ProShares.**

### NY Chapter's Theme Event - "WE Renaissance Women!" November 13, 2014

A spontaneous event was hosted by the NY Chapter to promote more intimate networking opportunities over shared interests in a small-group networking event. *14 lucky members* had a chance attend the exclusive "The Salon: Art + Design" opening night of the Vernissage Party at the Park Avenue Armory. Members networked over their shared interest in art.

### European Launch Event November 7, 2014



European WE launched in London at a successful breakfast meeting with a turnout of *90 attendees*. A panel discussion with **Isabelle Bourcier**, **Debbie Fuhr**, **Rachel Lord** and **Deborah Yang** included topics such as the vision & mission of the WE network, the ETF landscape and what role WE plays in future plans and next steps. The event was sponsored by SPDR ETFs.

### Toronto Regional Launch Event November 12-13, 2014



**National Bank Financial Markets Podium** hosted the event with a well-received inspiring speech by **Dr. Pauline Shum**, Professor of Finance at the Schulich School of Business and Founding Director of the Master of Finance program. *70 attendees* joined us. In addition, 20 women including Chapter co-chairs **Tanya Rowntree** & **Deborah Frame** took part in the TMX market open: [TMX Opening Bell](#).

### San Francisco Regional Kick-off November 19, 2014



The San Francisco WE launch event was held at the Charles Schwab Event Center, and attracted *121 attendees*. **Elisabeth Kashner** and **Deepa Damre**, co-heads of the SF chapter, welcomed everyone before hearing from **Sue Thompson**, WE Co-President and BlackRock Managing Director, **Amy Schioldager**, BlackRock Senior Managing Director, and **George Pereira**, Charles Schwab's Investment Management SVP and COO.

### IMN's Global Indexing & ETFs Conference in Arizona December 7, 2014

#### Women in ETFs Founders Panel & Networking

The panel featured **WE Founders: Kathleen H. Moriarty, Sue Thompson, Deborah Fuhr, Michelle Mikos, and Linda Zhang**. They discussed the back-story on the launch of the group; critical components and drivers of the growth of ETF strategies from the perspective of women industry leaders; and women as investment decision-makers and leaders in financial service firms. Success stories and the importance of connecting dots in the ETF ecosystem were shared.

### Washington/Baltimore Regional Launch Event December 11, 2014



The DC/Baltimore kick-off event on December 11th was a fantastic success! *30 women* from a wide range of functions including research, portfolio management, operations, legal, and marketing discussed ideas for 2015 events and programs

for the new Washington chapter. Organizations represented included ETF sponsors, ETF managers, brokerage firms, exchanges, and law firms. **Joanne Hill** gave an inspirational introduction to the organization and its mission. The attendees had a strong level of interest in all the committees and activities of WE, including education and philanthropy. **A big thank you to ProShares for hosting and for ProShares and Nasdaq for sponsoring.**

### Women in ETFs Winter Symposium in Boston June 11 and December 15, 2014



**Boston was the first WE chapter to hold a launch event on June 11**, hosted by and held at SSgA's headquarters with *75 attendees*. The agenda included networking, comments from SSgA senior management on **gender balance in work place**, **research on The Influential Investor**, and a robust panel discussion on **Women's Role in ETF Industry** with speakers **Sharon French (F-Squared)**, **Beverly Goodman (Barron's)**, **Linda Zhang (Windhaven)**, and **Jill Mavro (SSGA)**. This was followed on **December 11 with WE Boston's Winter Symposium, sponsored by Jeffries, F-Squared, and SSgA**, for *90 members and guests* (photo above). After networking, the educational and philanthropic program delivered a professional development workshop with executive coach, **Colleen Boselli** from Strength Catalyst Partners, and an inspirational giveback session with the non-profit organization, Solutions at Work. Attendees donated business attire to support SolutionsWear, a program providing professional clothing to homeless and low-income men and women enrolled in job training.

*Stay up to date and view more photos of from our events by visiting [www.womeninets.com](http://www.womeninets.com)*

## Upcoming Events & Education Initiatives

Women in ETFs Breakfast at Inside ETFs Conference in Florida  
January 26, 2015

7am: Breakfast & Networking

7:30am: Panel Discussion moderated by **Sharon French**, President of F-Squared Capital, and focus on the **Investment Outlook for 2015**. Guest panelists include: **Liz Ann Sonders**, Senior Vice President, Chief Investment Strategist, Charles Schwab & Co. and **MaryAnn Bartels**, Managing Director, CIO of Portfolio Solutions, Bank of America Merrill Lynch

International Women's Day  
March 9, 2015

WE will be ringing to bells at NYSE & Nasdaq in observance of International Women's Day

WE Awards Event Will Be Held In November in New York City and Many Regional Events To Be Scheduled

Webinar pilot on topics such as career paths, the ETF industry and more in 2015

## WE in the News

Click on the below links to view WE news. Click [here](#) to view complete news archive.

Money Management Executive, [Top Women Execs Offer Insight, Advice](#)

Online PR News, [Deborah Fuhr of ETFGI and Co-Founder of Women in ETFs to Receive the William F. Sharpe Indexing Lifetime Achievement Award](#)

eFinancialnews.com, [Women in ETFs Leadership Member, Ursula Marchioni, Recognized as a 2014 Rising Star of Asset Management by Financial News](#)

ETF Trends, [Inside the Growth of Women in ETFs](#)

ETF.com, [Why We All Need Women In ETFs](#)

## Career Center

Time for a career change? Click [here](#) to view current job openings!

**CONNECT** | Create opportunities for professional advancement by expanding connections among women in the ETF industry

**SUPPORT** | Offer guidance for the current and next generation of women in ETFs

**INSPIRE** | Provide forums for education and idea sharing across the industry and beyond

## Share, Empower & Recruit New Members!

Women in ETFs was organized to bring together women in the ETF industry. Its mission is to further the careers of women today by leveraging our collective skill and ambition.

**ENGAGE** | WE would like you to become involved in your regional chapters, attend events, and possibly serve on committee(s) in support of our mission. Help our mission by sharing this newsletter within your network!

**RECRUIT** | Know someone who is interested in joining? Have them fill out their [WE application](#). We think members will find WE a unique opportunity to advance their knowledge and build a valuable network in this fast-growing industry.

**STAY INFORMED** | Join our [WE group on LinkedIn](#). Don't forget to visit our [website](#)!