

2023 calendar of events



JANUARY

- JAN 25** **Your Story is Money. Learn How to Tell It! (Member Only Event)**
Stacy Havener, Founder, and CEO of Havener Capital Partners. Stacy’s message of “Rebel” is a defining tagline for a proclaimed introvert, powerful storyteller, and successful founder. Her authenticity and storytelling ability are incredibly powerful while helping us learn how to step up to our brand authenticity and embrace relatability. Location: Merion Cricket Club in Haverford.

FEBRUARY

- FEB 13** **WIN New Member Meet and Greet-Zoom**
WIN welcomes our newest members to a virtual meet & greet! We invite you to learn how to make the most of your WIN membership, upcoming events, access points to the WIN network, and how to capitalize your new member benefits.
- FEB 22** **Lessons from the C-Suite**
If getting to the C-Suite is a career goal, or if you just want to position yourself for your next “big thing”, join us for a panel you won’t want to miss...with three of Philadelphia’s most successful leaders who will share their career journeys and lessons learned along the way to the C-Suite. Hosted by Hirtle Callaghan.

MARCH

- MAR 29** **Women Funding Innovation through Angel Investing**
As we seek to help expand the number of women investors and women-led high-growth businesses in the greater Philadelphia region WIN welcomes Executive Director of Robin Hood Ventures, Ellen Weber and Gail Ball of Delaware Innovation Space who will introduce us to the many aspects of angel investing, including how much money is needed to be an investor, how to source deals, how diligence works, how to value an investment, and much, much more. Hosted by KPMG Philadelphia.

MAY

- MAY 15** **Member only virtual Happy Hour & Trivia**
Join your fellow WIN members for an hour of banter and fun competition. Prizes will be awarded, and you’ll learn new trivia too! Hosted by Eileen Ward of the WIN Membership Team.

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MAY

MAY 10

Building Your Network Authentically

Join us for a dual program and networking event, surrounded by the fabulous stylings at Anthropologie in Wayne. It will be an evening to both refresh your closet and your network including a short presentation on how to build your network authentically.

JUNE

JUN 7

Mid-Year Market Perspectives

Join WIN and a panel of top investment & economic leaders for an update on the State of the Economy and guidance for navigating the financial markets in H2 2023. Hosted by Vanguard.

JUN 20

Golf Outing in partnership with CFAP-Member Guest

We welcome WIN members and guests, CFA members to our annual golf outing sponsored by the CFA Society of Philadelphia. Phlmont Country Club will host golfers and guests with dinner following.

JULY

JUL 26

WIN Annual Member Only Summer Social

We are thrilled to announce that our Member-Only Summer Social is back again at the Overbrook Golf Club. Wine and heavy hors d'oeuvres are on the menu in this beautiful garden setting where you will spend time with your "old" friends from WIN and meet new members as well!

AUGUST

AUG 2

Allyship and Advocacy

This event brings together a diverse audience to discuss the topic of "Allyship and Advocacy." This event, to be held at Lincoln Financial Group, will feature a panel of expert speakers who will address the importance of Advocacy and Male Allyship for women in corporate America. Hosted by Ascend & Lincoln Financial Group.

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SEPTEMBER

SEPT 13 **Design Thinking 2.0**

Following up on our amazing September 2022 Design Thinking event, Marla Carson and Collin Keen from SEI will again lead the group in understanding the fundamentals and application of Design Thinking as well as incorporate the experiences of a group of attendees from last year's program. Hosted by SEI at their Oaks headquarters.

SEPT 20 **Career Panel**

Are you thinking about a professional certification and don't know where to start? Then WIN has a session just for you! A panel discussion that will cover the features of career benefits of the CFA, CFP, MBA, and FINRA licenses and how to get started in pursuing one, or more, of these programs. Hosted by The Haverford Trust Company.

SEPT 25 **Negotiating a Better Salary**

Learn how to maximize compensation both for current and new job opportunities. Many professionals are reluctant to ask for a well-deserved raise and less likely to aggressively negotiate for higher, more robust salaries and compensation packages. Hear from Xin Lewis, Kingsley Gate Partners. Virtual lunchtime event.

OCTOBER

OCT 5 **Boardroom Readiness**

Do you aspire to have a seat on a board? If so, how do you prepare yourself to be "boardroom ready?" Hear from a group of experienced board members who will share their thoughts on opportunities in the Corporate and Not-for-Profit sectors as well as what could be the best preparation for board service. Hosted by FS Investments.

OCT 25 **Nightmare On Wall Street – Scary Stories in Cybersecurity**

Cyber threats are everywhere and threaten our work life, our personal life and our clients' lives. What can you do to prevent you (and your company) from dealing with a Scary Cyber Story? Hosted by Brandywine Global Investment Management.

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NOVEMBER

NOV 15 **Fireside Chat featuring the SEC**
Hartford Funds will host a fireside chat with Jorge Tenreiro, Division of Enforcement, U.S. Securities and Exchange Commission) regarding the SEC’s regulations and enforcement. The discussion will include an overview of the SEC, new rules, enforcement priorities and regulatory hot topics (AI and crypto).

DECEMBER

DEC 7 **Annual Holiday Social (Member-Only Event)**
Enjoy some holiday shopping with your friends from WIN for a member-only wine and light bites gathering at [Valley Forge Flowers](#). Kick off your holiday season, cross some shopping off your list, and spend time with WIN friends all in one evening!

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