



**THE AMERICAN COLLEGE**  
**CENTER FOR WOMEN**  
IN FINANCIAL SERVICES

# Advocacy for Women in Financial Services

[TheAmericanCollege.edu/Women](https://TheAmericanCollege.edu/Women)



THE  
**AMERICAN**  
**COLLEGE**  
OF FINANCIAL SERVICES®

# Advocacy and Amplification to Champion Women

## A note from the Executive Director

Welcome to The American College Center for Women in Financial Services! We advise professional women, their industry allies, and consumers on how to promote, advance, and advocate for women in financial services.

While we strive to prepare financial professionals to meet the needs of female consumers, we also conduct and leverage research regarding best practices for women working in financial services. Currently, white women occupy 23% and women of color occupy 4% of executive roles in the financial services industry.<sup>1</sup> Now is the time to turn up and step up, advancing gender parity in the financial services industry.

Contributions are making a real difference. Your generosity enables us to offer scholarships to The College's education programs and fund original research that informs the industry. Your continued support allows us to educate more women.

We extend a special thank you to our sponsors and donors. We have served women for over ten years, and our roots go deeper. The American College of Financial Services has set the standard for financial services professionals for almost a century.



**Joellen Meckley**  
Interim Executive  
Director

## OUR MISSION:

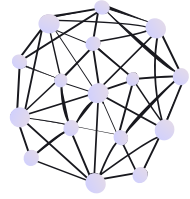
*To promote the advancement of women in the financial services profession through research, education, and awareness.*

## OUR VISION:

*To prepare financial professionals to meet the needs of female consumers.*

<sup>1</sup> Kweilin Ellingrud, Alexis Krivkovich, Marie-Claude Nadeau, and Jill Zucker. Closing the gender and race gaps in North American financial services. McKinsey & Company. October 2021.

# Inclusive Outreach that Connects Us All



## Timely and Impactful Research

Our ongoing, timely, and original research, impacting women in financial services, delivers insights on important topics spanning the field. Research from outside sources is also examined and evaluated to inform ongoing initiatives for the advancement of women.

## Women Working in Wealth<sup>SM</sup> Podcast

Join us for our monthly podcast highlighting the unique career opportunities for females in the financial services industry and serving to dispel industry myths. An immersive experience, the podcast invites presenters to share their journeys on their unique paths to career success.

Visit [TheAmericanCollege.edu/Podcasts](https://TheAmericanCollege.edu/Podcasts) to listen or access episodes on various streaming apps, including Spotify, Apple podcasts, and Google podcasts.

## Campaigns Focused on Elevating Women

**#25by2025** — Women currently represent 20% of financial advisors.<sup>2</sup> Our goal is that women comprise 25% of the financial advisor population by 2025.

**#Mission2030** — Currently, nearly 25% of high school students must complete personal finance education.<sup>3</sup> Join us in the mission for all U.S. high school students to be required to complete a one-semester personal finance course by 2030.

**#40by2040** — Fewer than 25% of executive roles are held by females.<sup>4</sup> We aspire for women to comprise 40% of C-suite and board positions by 2040 as an industry-wide standard.

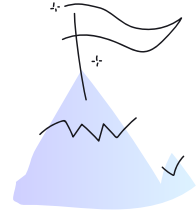
**#SeeHerBeHer** — To attract more women to careers in financial services, young women need to see women in roles that are typically held by men. If she can see her, she can be her.

<sup>2</sup> Investment News. Wealth management needs more female advisers. April 5, 2021.

<sup>3</sup> CNBC. Nearly 25 percent of U.S. students have access to personal finance education. April 22, 2022.

<sup>4</sup> McKinsey & Company. Still struggling: Not enough women in the c-suite. October 21, 2021.

# Help Us Help Women Rise



Funded by donations from individuals and organizations, the Center for Women in Financial Services' sponsors and donors allow us to support initiatives in research, education, and awareness.

We look to collaborate and partner with financial services organizations focused on advancing gender parity through the intersection of philanthropy and strategic planning to **do well by doing good for women**.

## Support Us

Demonstrate your commitment to the advancement of women in financial services and donate today! Visit [bit.ly/SupportWomensCenter](https://bit.ly/SupportWomensCenter).

## WMCP® Scholarships for Women

The Wealth Management Certified Professional® (WMCP®) Scholarship for the Advancement of Women in Financial Services is an unparalleled educational and mentorship experience focused on transforming women's lives. The scholarship includes a mentoring program sponsored by Women in Insurance & Financial Services (WIFS) and a complimentary WIFS membership provided by the scholarship's lead sponsor Ameritas.

Apply for a scholarship at [TheAmericanCollege.edu/Scholarships](https://TheAmericanCollege.edu/Scholarships).

## Meet Our Staff:



**Joellen Meckley**  
Interim Executive  
Director

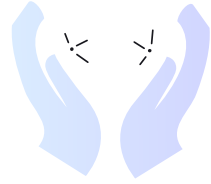


**Lindsey Lewis,**  
**MBA, ChFC®, CFP®**  
Director and Chair



**Kaylee Ranck**  
Research Director

# Applauding Women Working in Wealth<sup>SM</sup>



## Women Working in Wealth<sup>®</sup> Summit

Women from around the country in financial services and their allies come together to collaborate, celebrate insights and innovations, and support each other in advancing gender parity at the annual Women Working in Wealth<sup>SM</sup> Summit.

Industry leaders address how to break biases and uncover ways to charge ahead with care and courage. Leaders from the Center for Women in Financial Services also facilitate workshops on ways to advance the industry by promoting and advocating for women in financial services.

## Women Working in Wealth<sup>SM</sup> Awards

This award was created to showcase women who inspire, mentor, and strive to advance other women in financial services. Nominees are from varying experience levels. Recipients are announced at the annual Women Working in Wealth<sup>SM</sup> Summit and celebrated for their “roll up your sleeves” enthusiasm and commitment to help create gender parity in financial services.

## Align Your Brand as an Advocate for Women

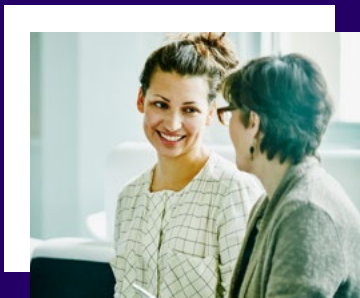
As a sponsor for the Women Working in Wealth<sup>SM</sup> Summit and Awards Ceremony, your organization can demonstrate its commitment to help advance gender parity in financial services.



**“The mission of The American College Center for Women in Financial Services resonates with me. By supporting and advancing women in the financial services profession, we can increase awareness and access to financial literacy and investor education. With the commitment of The College, women can and will transform the profession and help more individuals and families become financially resilient.”**

### **Marguerita (Rita) M. Cheng, CFP®, RICP®**

Chief Executive Officer, Blue Ocean Global Wealth,  
2022 Women Working in Wealth<sup>SM</sup> Award Recipient



# Activating Gender Parity

There are many ways to commit to advance women in financial services. Here are a few options to connect with the Center for Women in Financial Services and stay engaged:

- ✔ Take our pledge to promote, advance, and advocate for women in financial services.
- ✔ Connect and collaborate in partnership to expand your network and explore solutions.
- ✔ Subscribe to our newsletter for industry news, current events, and updates.
- ✔ Become a sponsor to use your influence and advocate for women.
- ✔ Register for CE webcasts, CE courses, and upcoming webinars to learn from industry insiders and thought leaders and to further deepen your skills.
- ✔ Attend Wednesdays with Women Working in Wealth™ to learn “how-to” advance women in financial services.
- ✔ Review research that delivers the data and details you need to propel change.

Visit [TheAmericanCollege.edu/Women](https://TheAmericanCollege.edu/Women) for more information.

## Easily Connect With Us on Social Media

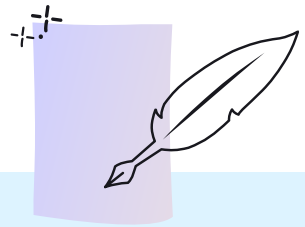
You can find us on LinkedIn, Instagram, Twitter, TikTok, and Facebook. #WomenWorkingInWealth



# An Informed Community Speaks

The Center for Women in Financial Services remains committed to you, your female colleagues, and allies. Our ability to perform original research informs how our community defines the challenges faced by all women who are connected to the financial services industry.

Together, we create accountability for promoting, advancing, and advocating for women. We invite everyone to review and take our pledge.



## Sign the Pledge!

As a woman working in wealth or her ally, I pledge to promote, advance, and advocate for women in financial services. Starting [Date] \_\_\_\_\_, I pledge to be accountable in the following areas:

- I will Sponsor women by helping increase their visibility and success in financial services.
- I will Mentor women within the industry. In each interaction, I will turn up and be present.
- Upon completion, or as appropriate, I will open up my network to advance women.
- I will Advocate for women, using my voice on social media and in my interactions in the office, at conferences, and within organizations.
- I will actively address inappropriate behavior, microaggressions, and/or horizontal oppression.

Signature: \_\_\_\_\_



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# A Legacy of Industry Leadership

Founded in 1927 by financial services education pioneer Dr. Solomon Huebner, The American College of Financial Services and its Centers of Excellence are dedicated to the pursuit of knowledge that aids the development of the industry and our communities. The College's mission is threefold: to provide applied financial knowledge and education; to promote life-long learning; and to advocate for ethical standards for the benefit of society.

**VISIT** [TheAmericanCollege.edu/Women](https://TheAmericanCollege.edu/Women)

**EMAIL** [WomensCenter@TheAmericanCollege.edu](mailto:WomensCenter@TheAmericanCollege.edu)

**CALL** 610-526-1442



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