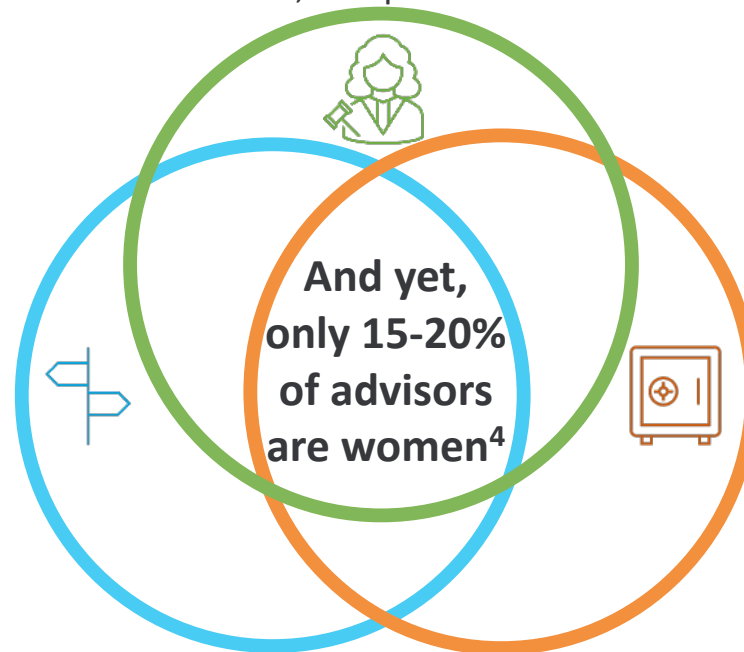


63%

63% of women under the age of 45 are the financial decision-makers in their household, compared to 37% of older women. ¹

70%

of widows switch financial advisors within a year of their partner's death. ²



**And yet,
only 15-20%
of advisors
are women⁴**

\$30T

\$30 trillion in assets will shift into the hands of US women by the end of the decade. ³

¹Merrill Lynch Wealth Management: "[Seeing the Unseen: The Role Gender Plays in Wealth Management](#)," 2020.

²Ruth Ackerman, Investment News, "Women & investing: Why many advisors are missing out," 2012.

³McKinsey & Company, "Women as the next wave of growth in US wealth management," 2020.

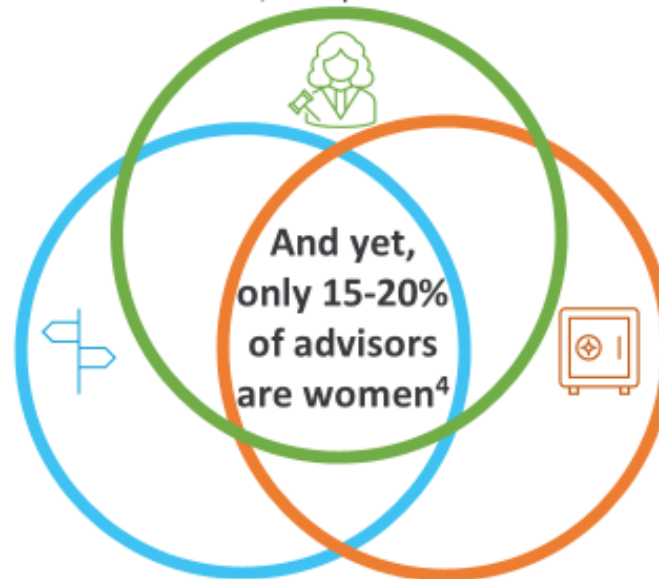
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What Unique Qualities do Women Advisors Bring to the Table?



I think it's the empathy aspect. I think it's the listening aspect. I think simplifying and breaking down details of financial planning in layman's terms. Women have the ability to explain and understand in a way that I feel like resonates possibly better, at least I feel that way, than a male counterpart

EMPATHY
RELATABLE VULNERABLE
CONNECTION TEAM
EDUCATE DETAIL-ORIENTED EMOTIONAL
COLLABORATIVE COOPERATIVE
TRUST
WOMAN CARING
HELP CONVERSATION
PERSONAL LISTEN
COMMITMENT
RELATIONSHIP

Why Are Women the Ideal Financial Advisors?



What Unique Qualities do Women Advisors Bring to the Table?



Relationships/ Connection



I have the ability to connect with people on that, male or female. I bring life events into my conversation. I am not, "Let's talk about business." I do it all. I really want to know the business of course, but I want to forge the relationship first to be sure it's a good fit.

Empathy/ Active Listening



Women are more empathetic. They want to tell you their story before they give you their money and you've got to listen and say, "Look, I've been through some of the same things." I don't tell them that I'm a financial adviser. I tell each of my clients that I'm their life advisor.

Education



I think simplifying and breaking down details of financial planning in layman's terms. Women have the ability to explain and understand in a way that I feel like resonates possibly better, at least I feel that way, than a male counterpart.

Inclusion



If you have a man [advisor] and he's not even talking to her and she's sitting over here like, "You know what, Buddy? I'm the one who writes the check and you're not even having a conversation with me." You totally disengaged her right here.

Women advisors feel that these strengths lead to better **trust** and better **holistic planning**, and make them **better advisors**.

Overcoming the Barriers to Women joining the Financial Advisory Industry



1

I don't know anything about this industry or careers available.

Financial literacy and career education in **high school and college**

2

Being an advisor is about sales and/or numbers/analytics.

Communicate that an advisor is about **relationships, empathy, listening, and helping people plan and meet goals**

3

It's an "old boy's club," and I'll be outnumbered and not taken seriously.

Visibility and representation of women – in leadership, on committees, on magazine covers

4

I won't be able to learn, sell, and earn enough to support myself.

Thorough training and a **salary for at least 1-3 years; promote benefits** of career (flexibility, stable income)

5

I'll be on my own.

Mentors and teams