



WOMEN IN CONSUMER FINANCE

2023 AGENDA



DECEMBER 11-13



PALM SPRINGS



WELCOME TO PALM SPRINGS.

We're thrilled to have you here for our 6th annual conference. Our agenda was carefully crafted to provide you with ample opportunities for reflection and connection. We hope the next 3 days generate a feeling of belonging and self-confidence.

On our agenda, you'll see symbols that indicate what to expect. Here's a breakdown of what they mean.



CONNECTION OPPORTUNITY



TEAM ACTIVITY



INSPIRATIONAL STORIES & SPEAKERS



ACTIVE & ENGAGED LEARNING

















GET CONNECTED...

WiFi Network: WCF2023
Password: helloWCF



<p>8:30 AM ↓ 12:30 PM</p>	<p>Pre-Conference Activities Prior registration required. See page 13 for meeting locations and times.</p>	
<p>12:30 PM ↓ 2:00 PM</p>	<p>Open Time for Networking</p>	
<p>2:00 PM ↓ 3:15 PM</p>	<p>Meet Your Team Check NetworkingTag or the WCF registration desk for details on where to meet your team.</p>	<p>sponsored by  SPRING OAKS CAPITAL LLC</p> 
<p>3:30 PM ↓ 4:00 PM</p>	<p>Official WCF Welcome Kick-off the conference with us in the Crystal Ballroom</p>	
<p>4:00 PM ↓ 4:30 PM</p>	<p>Keynote - Sallie Krawcheck Learn more about Sallie on page 6.</p>	<p>sponsored by SKUX</p> 
<p>4:30 PM ↓ 5:10 PM</p>	<p>Our Stories Learn more about the storytellers on page 8. Crystal Ballroom.</p>	<p>sponsored by  LegacyNOW A product of ESTATE REGISTRY</p> 
<p>5:10 PM ↓ 6:30 PM</p>	<p>Networking Reception Network over drinks in the Esmeralda foyer and patio.</p>	
<p>6:30 PM ↓</p>	<p>Dinner on Your Own (or with your team) Make plans with your team or friends.</p>	<p>sponsored by  SPRING OAKS CAPITAL LLC</p> 
<p>AFTER DINNER</p>	<p>Meet with Friends at The Place The lobby bar/outside firepits</p>	

<p>7:15 AM ↓ 8:30 AM</p>	<p>Breakfast Whole Shebang team tables are in Mountain View (Mezzanine); Open seating in Stir (ground level)</p> 
<p>8:00 AM ↓ 8:20 AM</p>	<p>Optional Morning Mindfulness Session Get into the perfect headspace for the day in the Crystal Ballroom</p> 
<p>8:30 AM ↓ 9:45 AM</p>	<p>Workshop #1 See pages 9-10 for options and locations.</p> <p>sponsored by</p>  
<p>9:45 AM ↓ 10:15 AM</p>	<p>Networking Break Crystal Foyer</p> 
<p>10:15 AM ↓ 11:30 AM</p>	<p>Workshop #2 See pages 10-11 for options and locations.</p> <p>sponsored by</p>  
<p>11:30 AM ↓ 12:45 PM</p>	<p>Lunch - Rose Lawn Attendees from Career Champion firms (Citizens, Capital One, Discover) -- find each other at the tables with your company names.</p> 
<p>12:45 PM ↓ 1:35 PM</p>	<p>Our Stories Learn more about the storytellers on page 8. Crystal Ballroom.</p> <p>sponsored by</p>  
<p>1:35 PM ↓ 2:15 PM</p>	<p>Fireside Chat Learn more about panelists on page 7. Crystal Ballroom.</p> <p>sponsored by</p>  
<p>2:35 PM ↓ 3:45 PM</p>	<p>Trivia Smackdown Compete for our HUGE trophy & bragging rights. Crystal Ballroom.</p> <p>sponsored by</p>  

3:45 PM



4:15 PM

Networking Break

Crystal Foyer



4:15 PM



5:30 PM

Structured Networking Activity

3 activity options available. See page 14 for details.

sponsored by



6:30 PM



9:00 PM

Dinner & Dancing

Let loose with us in the Esmeralda Ballroom

sponsored by



9:00 PM



11:00 PM

After Hours & Karaoke

Sing your heart out with friends, or just enjoy watching, in the Stir nightclub (ground level)

sponsored by



DAY 3

December 13

7:15 AM



8:30 AM

Breakfast

Whole Shebang team tables are in Mountain View (Mezzanine); Open seating in Stir (ground level)



8:00 AM



8:20 AM

Optional Morning Mindfulness Session

Get into the perfect headspace for the day in the Crystal Ballroom.



8:30 AM



9:45 AM

Workshop #3

See pages 11-12 for options and locations.

sponsored by



10:00 AM



10:40 AM

Closing Keynote - Gemma Bulos

Learn more about Gemma on page 6. Crystal Ballroom.

sponsored by



10:40 AM



11:00 AM

Reflections

Reflect on your experience & takeaways. This is a quick yet powerful closing session. Crystal Ballroom.

sponsored by



KEYNOTES

SALLIE KRAWCHECK

Founder & CEO of Ellevest

sponsored by

SKUX

As the CEO and Co-founder of Ellevest, an investing platform that helps women build and manage their wealth, Sallie Krawcheck's professional mission is to get more money in the hands of women. She is a Wall Street trailblazer with nearly three decades of experience in the financial services industry. Sallie has led Merrill Lynch, Smith Barney, and Citi Wealth Management as CEO, and Citi as CFO. She's been named "The Last Honest Analyst" by Fortune and one of the "Most Influential Women in Finance" by Barron's.



Monday - December 11th at 4 PM

GEMMA BULOS

Social Entrepreneur, Speaker, Singer

sponsored by

 GDS LINK

Gemma Bulos is a visionary leader, a catalyst for change, and a relentless advocate for creating a better world. Through her multifaceted talents and boundless dedication, she inspires and empowers youth and women to embrace their purpose and raise their voices to join her in the pursuit of global progress and social justice. She has launched three award-winning social impact organizations on three continents. Collectively, these organizations have positively impacted the lives of over one million people.



Wednesday - December 13th at 10 AM

FIRESIDE CHAT

sponsored by



Tuesday - December 12th at 1:25 PM

This chat features a powerhouse panel of senior women and their stories of challenge and achievement in the consumer finance industry.

AMY ANUK

RevUp Capital & Halogen Ventures

Amy Anuk is a global C-suite executive. She most recently served as Senior Vice President and Managing Director of Encore Advantage. While there, she founded Encore's Women's Leadership program.



MELINDA MCBRIDE

SVP, Enterprise Alliances and Emerging Markets Leader at Equifax

Melinda has more than 25 years of experience in the technology and data & analytics industries. She's built her expertise around alliances, alliance management, and partner innovation.



YOLANDA SCHUFFORD

Chief Communication & Public Affairs Officer at Beyond Finance

Yolanda manages lobbyists in key states and develops strategies to protect and encourage good policy for the ARM industry. Her work has been recognized locally and nationally through multiple awards.



MARISA CALDERON

Executive Director, NCRC Community Development Fund, Inc.

Marisa is an experienced executive who has been recognized and cited nationwide for her expertise in financial services. She's dedicated to the issues of economic mobility and bridging the racial wealth gap.



STORYTELLERS

Inspiring women will take the stage to share their stories of challenge, heartbreak, and perseverance. It's one of the most loved and emotional parts of the conference. Bring your box of tissues and a notebook, because there are many lessons to learn.

See more details about storytellers and what they'll share on [NetworkingTag](#).

Monday - December 11th at 4:30 PM



CASSANDRA HURST
iCare Financial Corp



LISA FISCHER
Mission Lane



JESSICA KLANDER
Bassford Remele

Tuesday - December 12th at 12:45 PM



LYNN REYNOLDS
CBE Companies



DOROTHIA ALLEN-TAYLOR
Capital One



NIA ROSE
DCM Services

sponsored by



WORKSHOP BLOCK #1

Monday - December 11th at 8:30 AM

sponsored by



1

How to Make Your Voice Heard

(for emerging – experienced leaders) LOCATION: Valencia 1&2

Learn to effectively articulate your ideas, assert yourself in meetings, and communicate confidently. We'll address common challenges and subtle forms of discrimination, such as being interrupted, being asked to take notes, or being given less strategic assignments than male colleagues. You'll leave with actionable tips and a plan for improvement.

Led by Dr. Marlene Fuller (Citizens Bank) & Carri McQuerrey-Funk (DLL)

2

Moving from Transactional Communications to Transformational Connections

(for experienced leaders) LOCATION: Valencia 5&6

Transformational exchanges empower and enlighten. Learn how to give and get the most out of every relationship. Discover what you have to offer, what you have to gain, and how to practice the boundaries necessary for maintaining transformational connections.

Led by Bekah Luebcke & Lisa Rozzelle (Crown Asset Management)

3

Listening is the Secret to Effective Communication. Why is it So Hard?

(for all levels) LOCATION: Crystal G

Great listening improves communication, betters relationships, and increases empathy. But so many of us have trouble actually doing it. We'll explore the barriers to effective listening and how to overcome them. You'll leave with the tools necessary to listen more deeply and enhance your personal and professional life.

Led by Cassandra Hurst (iCare Financial Corp.) & Della Franklin (Unifin)

4

How to Reinvigorate Your Career and Remain Engaged at Your Company

(for experienced and mid-career leaders) LOCATION: Crystal I

Feeling stuck, unchallenged, or disengaged? This workshop will help you rediscover a passion for your work. You'll explore ways to grow in your current organization by identifying what energizes you, where your interests lie, and what skills you may desire to develop.

Led by Suzanne Currier (Currier Coaching)

5

Let's Write Your Next Chapter

(for executive leaders or experienced professionals approaching retirement)
LOCATION: Crystal H

Do you have more of your career behind you than ahead? If you find yourself thinking about the mark you've made and considering what you still want to accomplish, whether you've got your eye on a big career move, you're ready to sit on a board or engage in philanthropy, or ready to retire, we'll help each other clarify our dreams and chart the path forward.

Led by Sherry Jordana (Sherry Jordana Associates)

6

Roundtable: The Challenges of Business Ownerships

(for business owners) LOCATION: Toulon

This is an opportunity to gather with WCF attendees who are business owners and share challenges and solutions around growth, strategy, operations, leadership, culture and more. This session will be led by one of your peers, and will have a loose agenda that allows for addressing your top of mind issues.

Led by Aleks Whitchurch (Quanta Credit Services, Inc)

WORKSHOP BLOCK #2

Tuesday - December 12th at 10:15 AM

sponsored by



1

Influencing at the Executive Level

(for experienced – executive leaders) LOCATION: Valencia 1&2

Whether you need to present to the board, speak on a conference panel, or influence a broad organizational decision, you'll learn how to communicate with impact, both verbally and non-verbally. Gain insights into your own strengths and areas for improvement and develop a plan for honing your executive presence.

Led by Sherry Jordana (Sherry Jordana Associates)

2

Managing across Life Stages and Locations

(for all levels) LOCATION: Valencia 5&6

This workshop will boost your confidence to manage a diverse and dispersed workforce effectively. You'll learn how to acknowledge the different life stages, backgrounds, and values among your team and how to leverage this diversity to enhance teamwork, collaboration, and innovation.

Led by Paige Corin (Tidewater Finance) & Rachel Auerbach (Blitt & Gaines, P.C.)

3

Recognizing Unconscious Bias and What to Do about It

(for all levels) LOCATION: Crystal G

In this workshop, we'll focus on practical steps managers and leaders can take to identify and address unconscious bias and mitigate its negative effects. You'll leave with tools you can use to take action right away and also to work with your team to enhance understanding of this important topic and how to continuously improve the culture at your organization.

Led by Crystal Walker (Management Leadership for Tomorrow)

4

How to Create a Positive Succession Plan

(for executive leaders) LOCATION: Crystal H

In this workshop, we'll explore the elements of a successful succession planning program, including identifying key positions and individuals within the organization, assessing their readiness for leadership roles, and developing and implementing a plan for grooming them for future leadership roles. We'll also talk about the importance of communication and transparency in the succession planning process, both for the individuals being developed and the rest of the organization.

Led by Tonia Brown (ARM Compliance Business Solutions) & Nidhi Daga (JP Morgan Chase)

5

Building a Strong Financial Foundation & Future

(for all levels) LOCATION: Crystal I

Money is our #1 source of stress, and it has an outsized impact on our futures and overall well-being. Data shows that when we take command of our money, it can become a driver of confidence. In this workshop, you'll learn tools to take control of your finances and achieve long-term financial security.

Led by Ashley Bleckner (Ellevest)

WORKSHOP BLOCK #3

Wednesday - December 13th at 8:30 AM

sponsored by



Moss & Barnett

Prioritizing mental health creates a more productive and engaged workforce, lowers absenteeism rates, and improves overall business outcomes. That's why this workshop block focuses on mental health. You'll spend 75 minutes learning about stress management, work-life balance, and prioritization. Our hope is that you'll take this knowledge back to your organization and foster healthier a workplace for yourself and others.

1

Navigating Work and Maintaining Your Mental Health & Wellness

(for emerging leaders) LOCATION: Valencia 1&2

This workshop will offer practical tools and strategies to help manage stress, build resilience, and maintain a healthy balance. We will cover mindfulness techniques and other stress reduction strategies that you can use to cope with personal and professional demands. Additionally, we will explore ways to establish healthy boundaries, set realistic goals, and manage your time effectively.

Led by Danielle Banner (JP Morgan Chase & Co.), Amy Lanning (Estate Information Services), Cayla-Simone Riggs (Kredit Financial)

2

Managing Your Team in the Context of Mental Health

(for experienced leaders) LOCATION: Valencia 5&6

Today's environment demands that leaders must not only attend to their own well-being but also the mental health of their team members, and few of us have formal training in this area. This workshop will help to frame and start the conversation.

Led by Jessica Atkinson (WILB Effect) & Litza Bodden (Shining Light LLC)

3

Fostering a Culture of Mental Health & Well-being

(for executive leaders) LOCATION: Crystal G

Promoting mental health in the workplace requires a multi-faceted approach that involves addressing both individual and organizational factors. Employers who prioritize mental health are more likely to have a productive and engaged workforce, lower absenteeism rates, and improved overall business outcomes. But where do you start? This workshop will offer a framework for further discussion with the leadership team.

Led by Michelle Macartney & Tricia Wyatt (Bridgeforce)

4

Roundtable: I'm Close to Retirement and Have Lots of Complex Feelings

(for executive leaders) LOCATION: Crystal I

Is your next step retirement? Gather with a group of women at the same stage for an open and honest discussion about your plans, your dreams, and the complex emotions that retirement can bring up, including excitement, uncertainty, and perhaps even some fear or anxiety. You'll find a supportive environment to share your concerns, questions, strategies and tips for navigating this life change.

Led by Lisa Bonalle-Hannan (GDS Link)



PRE-CONFERENCE ACTIVITIES

Monday - December 11th before the conference officially begins

FAULT LINE JEEP TOUR

A naturalist guide will pick you up for an adventure through the cuts and canyons of the San Andreas Fault Zone. A bottled water and granola bar will be provided at check in.

Meet in front of the hotel at 7:45AM. You'll depart at approximately 8:00 AM. You'll return to hotel at around 12:30 PM.

LIVING DESERT TOUR

A bus will pick you up out front of the hotel for a quick 15-minute ride to The Living Desert, a beautiful and unique 1,200-acre wildlife sanctuary and botanical park. On this 2-hour tour, you'll explore botanical gardens that replicate ten major North American desert regions.

Meet in front of the hotel at 8:15 AM. The bus will depart at approximately 8:30 AM. You'll return to hotel at around 12:30 PM.

BEAR CREEK WASH HIKE

A bus will pick you for quick 15-minute ride to the trail. The 2-hour hike will take you through canyons and boulders surrounded by native shrubs and trees. You'll take a refreshing stop at a local date-shake shop on your way back to the hotel.

Meet in front of the hotel at 8:15 AM. The bus will depart at approximately 8:30 AM. You'll return to hotel at around 12:30 PM.

MIND & BODY SEMINAR

Reflect, stretch, and set your intentions for next few days during this relaxing meditation and yoga session. Yoga mats will be provided for those who do not have them. Make sure to bring a notebook and pen. A bottled water and snack will be provided.

Begins at 9 AM in Mountain View (Mezzanine level) and will wrap up around 11 AM.

NETWORKING ACTIVITIES

STRUCTURED MEET & MINGLE

Meet approx. 8-12 new people in our elevated version of speed networking. If you're looking for something specific (like a supplier, mentor, or new team member), this is your chance to put it out there. You never know who knows the right person and can make an impactful introduction. Helpful forms and pens will be distributed to help you keep track of all your new connections.

LOCATION: Crystal Ballroom

ROLE ROUNDTABLES

Dive into a discussion with peers who have a similar role as you. Get insight into the challenges you're facing and chat about the latest trends with women who understand exactly where you're coming from. If you're very experienced in these areas, this is an opportunity to offer your insight or mentorship to others. Self-led tables will be separated into in following categories:

- Compliance
- Legal
- Operations
- HR
- Sales & Marketing

LOCATION: Valencia 1&2

COMMUNITY CONNECTION

We know that many of you attend WCF with hopes of connecting with women who understand what you're going through on a personal level. These roundtable style conversations will help you connect with and build bonds with fellow attendees based on your personal life rather than your professional life. Self-led tables will share experiences about:

- Being a working mom
- Caring for aging parents
- Being a military veteran or family member
- Parenting a child with special needs
- Diversity, equity, inclusion and belonging

LOCATION: Valencia 5&6

COMMUNITY IMPACT

WCF isn't just about helping women in finance excel. We also want to help women across the country and around the world thrive. To help us do that, we partner with organizations that work to develop financial stability for women and girls. This year we partnered with LIFT and For the Good.

FOR THE GOOD

When girls transition to secondary school they benefit from significantly reduced fertility rates, higher incomes, and more decision-making power. For the Good works with communities in regions or Kenya and sub-Saharan Africa to keep girls in school.

www.forthegood.org



LIFT

Poverty, like wealth, is passed down from generation to generation. LIFT's mission is to break that cycle by investing in parents. We build families' well-being, financial strength, and social connections to lift two generations at once.

www.whywelift.org



HELP MAKE AN IMPACT.

Mental health is central to reaching success. LIFT parents also need access to tools like yoga mats, classes, Headspace, and Calm. Please help by making a tax deductible donation for as little as \$25. Use the QR code to the right to learn more.



generously supported by our lead community impact partners



THANK YOU

Magic. So often, that's the word that comes to mind when I try to describe Women in Consumer Finance.

Through the years, I have seen women's eyes light up when they realize they're not alone. I have seen burdens lifted from shoulders when women finally open up about the challenges they're facing. I have seen women stand taller when they recognize they're capable of more.

All of these moments are nothing short of magical. And they all have one thing in common – belonging.

Over the last year, I've returned to that word again and again. It's more evident to me now than ever before just how essential a sense of belonging is to success.

This year, I made a big decision. I sold my company (and former parent company of WCF), insideARM. Over the last couple of years, I began to feel that it was time for me to move on. I discovered my passion in supporting women and girls, and knew that's where I wanted to focus my full attention. Still, it was a big and slightly daunting decision.

Any anxiety I felt about it was eased by the encouragement I received from so many of you. Your support over the years made me believe in myself and my goals. For that, I would like to take a moment and say thank you.

Thank you for being a member of this community. Thank you for believing in the mission of WCF. Thank you for making me feel like I belong. That sense of belonging gave me the courage to follow my passion and take my next step.

I am so excited for what the future holds. I hope you will continue to be a part of our initiatives and that you find the support you need to propel you forward here.

STEPHANIE EIDELMAN

Founder & CEO
Women in Consumer Finance



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CAREER CHAMPIONS



SEE YOU IN 2024

NOVEMBER 11-13 | OMNI HOTEL | FORT WORTH, TX

Earlier date, easier location, same inspiring content and unbeatable connection opportunities. Get your boots and hats ready because we're heading to Texas!

Extra early registration pricing lasts until March 23.

