

FWA *What's New!*

THE FINANCIAL WOMEN'S ASSOCIATION OF SAN FRANCISCO FOUNDED 1956

Celebrating More Than
50 Years of Promoting
Financial Women's Success

A quarterly publication for members and friends of the Financial Women's Association of San Francisco.

President's Letter

Dear FWA members and friends:



Laura Pilz

The Financial Women's Association of San Francisco theme for 2010 is *Involvement* – for members, sponsors, scholarship recipients and the community

at large. Our members tell us networking is one of the primary reasons they join FWA and becoming involved in a committee or program is an ideal way to connect with a purpose.

In this issue of our newsletter, we highlight a number of committee opportunities. We currently have over 50 members who assist with the Scholarship Committee and welcome more. The Scholarship Luncheon event in June and the Financial Woman of the Year Luncheon in the fall provide a variety of opportunities for members to participate. We are expanding the marketing and communications strategy for FWA to include social media and are seeking volunteers to round out that committee as we move into the implementation phases (particularly those of you that are social media savvy).

Through our Alliance Committee and Sponsorship Committee we are connecting with our corporate partners at many levels. FWA has developed a reputation for great programming. Drawing on our membership and our connections in the community, we

are producing a series of programs with PricewaterhouseCoopers and participated in a terrific evening at Mills College in February (see [page 5](#)). In March we partnered with the Association for Corporate Growth in the East Bay for a program on the Credit Markets. The feature article in this issue highlights our multifaceted relationship with Charles Schwab & Co., our first Visionary Sponsor for 2010.

As the financial industry continues to address challenges, our members reaffirm the value of joining FWA. Thank you to all of you who renewed your membership for 2010. I am pleased to announce that our renewal rate this year was the highest it's been in the past five years. This is a terrific trend for our organization and a hopeful sign for the industry.

We have many fabulous programs and events on the schedule for the year ahead and the announcement of our Financial Woman of the Year will be made in May. We look forward to connecting with our members, sponsors and friends to make 2010 a dynamic and successful year for all.

Best,

Laura Pilz

SPRING 2010

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Win-Win for Schwab and FWA!



Charles Schwab & Co., Inc. and the Financial Women's Association of San Francisco are partnering to engage Schwab employees in the professional development and industry programs and resources we offer; as well as to tap into the expertise of their senior women.

Schwab has been a longtime supporter of the FWA, last year they were one of four Visionary Sponsors and have recently pledged as our first 2010 Visionary Sponsor. They also continue leadership support by having members on the FWA Board and Committees. At the Financial Woman of the Year luncheon they strategically used their sponsorship tables to invite clients

as well as employees. This showcased their support for the FWA and our Scholarship Fund while providing a unique opportunity for employees to engage with clients at an interesting and exciting event.

This year's partnership includes a variety of activities that will help Schwab utilize its corporate sponsorship more fully and will hopefully expand the participation of their employees. We are working with the company's HR/Diversity & Inclusion team to leverage the expertise of Schwab's female executive leaders by having them speak at FWA forums and as mentors in the FWA speed mentoring program. FWA events are being incorporated in Schwab's internal employee calendar. Other ideas under consideration include a brown bag lunch for Schwab employees about the programs and

opportunities that would be available to them as members and the possibility of the FWA joining Schwab and Macy's in their support for the *Wardrobe for Opportunity* fashion show fundraiser later in the year.

Our leadership is thrilled with Schwab's proactive approach to building a stronger partnership by taking their sponsorship from simply attendance at major events to full engagement with the breadth of opportunities membership provides throughout the year.

If you are interested in learning more about how your company could partner with us, please contact Fiona Grandi at fgrandi@kpmg.com.

5 Ways of Making the Most of Your FWA Membership

1. Raise your visibility.

Does your company (or you) have space that FWA can use to host a meeting, event or special occasion? Do you have special skills that the FWA can benefit from? Do you want to get involved but have limited time? Are you able to sponsor a table at a FWA event?

2. Attend meetings and events regularly.

Become a presence. Position yourself with new members as someone in the know. Build your network by following up with the people you meet at events. Offer to get together for coffee and then follow up again before the next event.

3. Join a committee.

FWA has a number of committees currently looking for membership participation. Committee chairs will work with you and within your time constraints. Some committees are a

labor of love while others only take a few hours a week or month. Being involved allows you to interact with members at a more meaningful level and gives you the opportunity to make a difference.

4. Invite friends and associates.

What better way to reconnect with your network than inviting them to an FWA event? While some events are member only, others are open to everyone. Prior to attending an event, send out an email with the information and say you hope to see them there. You will be surprised at how effective this can be. It is just one more way of getting in front of people.

5. Become an event greeter.

There is no better reason to introduce yourself than when it's your role. Attending events solo can be painful and greeters help make it

easier. As a greeter you welcome members and non-members to events, make them feel comfortable, bring them into a conversation and then continue on to the next. Not only do you make attendees feel welcome, you get the benefit of meeting everyone in attendance!

These are but a few ways of making the most of your membership.

Reach out to us to find out how you can be more involved.

FWA Membership Co-Chairs

Karen Chan
kyc4@pge.com

Jill Myers
jmyers@dzphillips.com

Get Involved! FWA Committees that are looking for member participation:

Name of Group: **Marketing & Communications**
Looking for: Lots
Estimated time commitment: Varies depending on job duty
Duties: Participating in marketing strategy development, assisting with website redesign effort, writing press releases and newsletter articles, contributing blog content, developing FWA Facebook page, moderating message boards for FWA LinkedIn group, etc.
Ideal candidate/s: Any previous experience with marketing, PR, web design, social media, writing skills, and passion for FWA
Meeting specifications: Primarily by phone
Contact person: Erin McCune erin@glenbrook.com or Lucy Carrico lucy.carrico@gmail.com

Name of Group: **Scholarship Committee**
Looking for: Open
Estimated time commitment: One afternoon for interviewing. Varies for luncheon
Duties: Interview candidates & help w/logistics for Scholarship lunch
Ideal candidate/s: Recruiters, past participants, anyone interested
Meeting specifications: You will be coached by the FWA school liaison for interviewing
Contact person: Anne Chambers, achambers1@comcast.net
Sarah Heaslip Whitelaw, swhitelaw@hallcapital.com

Name of Group: **Financial Women of the Year (FWOTY) & related luncheon**
Looking for: Lots
Estimated time commitment: Varies depending on job duty
Duties: Communication/announcements, PR, Volunteers for event, coordination w/ Scholarship Lunch
Ideal candidate/s: Any previous experience with event planning & coordination, marketing, PR, web design, writing skills
Meeting specifications: Primarily by phone
Contact person: Cara Peck peckcd@wellsfargo.com or Linda Jackson ellejxn@gmail.com

Name of Group: **Membership Committee**
Looking for: 3 people
Estimated time commitment: 4 hours per month
Duties: Varies depending comfort level. Attend monthly meetings, help organize mixers, follow up with non members after events, membership renewals (December), brainstorm
Ideal candidate/s: Anyone who is interested in expanding their network
Meeting specifications: Call in or attend in person
Contact person: Karen Chan, kyc4@pge.com and Jill Myers, jmyers@dzPhillips.com

Name of Group: **East Bay Committee**
Looking for: 5 people
Estimated time commitment: 4 hours per month
Duties: Attend monthly committee meetings, take the lead for one program a year
Ideal candidate/s: Marketing related experience
Meeting specifications: Call in or attend in person
Contact person: Sarah Tolson, stolson@finsvcs.com

Name of Group: **Silicon Valley Committee**
Looking for: 2 committee members
Estimated time commitment: TBD
Duties: Organize committee meetings, programs, brainstorm on how to increase FWA presence on peninsula
Ideal candidate/s: Anyone interested in expanding their network
Meeting specifications: TBD
Contact person: Nadia Brannon nbrannon@lecg.com or Elena Smirnov elena_smirnov@pacificadvisors.com

Welcome new FWA Members!

Lauriann Delay, Morgan Stanley
Carrie Dolan
Mandy Farmaian, The Eastridge Group
Claire Hayes, PricewaterhouseCoopers
Liz Hilton, Charles Schwab
Dana Jarvis, Burr Pilger and Mayer
Diana Millado, US Bank
Karin Modin, Lee Hecht Harrison
Shannon Parker, Smith Barney
Ayse Pehlivan, Golub Group
Trista Sanders, Ermst & Young
Laura Scott, Bank of the West
Sonia Sekhon, DeWinter Assoc
Danika Zhang, Mowat Mackie et al

Interested in becoming a member?

San Francisco / Bay Area

Karen Chan
karen.chan@pge-corp.com

Jill Myers
jmyers@dzPhillips.com

Career Opportunities

Looking for the next step in your career? Looking for the right person to fill an important position?

[Check out FWA's Career Opportunities and Career Corner to find a job or to post one.](#)

FWA of San Francisco is a targeted audience for employers seeking experienced professionals in the financial services industry. Our career site benefits both employers and candidates. ■

The World is a Wonderful Place: Insights on the New World's Investment Landscape



January 21, 2010
San Francisco

Shelby Notkin joined the FWA in January offering an illuminating reflection on today's

investment environment. Mr. Notkin, an industry luminary whose career includes 18 years at Morgan Stanley and 17 years at Capital Guardian, offered his perspectives in a presentation entitled, "The World is a Wonderful Place: Insight's on the New World Investment Landscape." He took us on a far-sweeping journey of US economic dominance covering the fall of the Berlin Wall,

and encompassing the rise and fall of Japan, the 90s bull market, the dot-com bust and the period of risk-seeking, cheap money that came crashing down in 2008.

As the discussion turned prospective, the continuation of globalization was a dominant theme with particular emphasis on economies in the developing world. Mr. Notkin focused on the global household consumption and GDP growth strength in the emerging markets. The current middle class surge, mostly in China and India, represents a multi-decade shift that foretells strong economic and income per capita growth.

As the title of the presentation suggests, the conversation was not all doom and gloom with respect to the US. On the contrary, Shelby does not rule out US equity market participation in global growth opportunities and views the recent once-in-a-generation troughs as attractive. In addition, 30-40% of US company revenues come from outside the US. While he recognizes that volatility is likely in the short term, and laments that the US consumer is suffering, in the longer term he remains optimistic about the US equity markets.

Contributed by: Sarah Heaslip Whitelaw



January Industry Leadership Series event



2008 FWA Scholarship recipient Betsabe Martinez Botaitis and 2010 Scholarship Co-Chair Anne Chambers



Shelby Notkin, Chairman of Personal Investment Management, Capital Guardian Trust Company, FWA Industry Leadership Series speaker, January 2010



2010 Scholarship Co-Chair, Sarah Heaslip Whitelaw and FWA President Laura Pilz

Code Switching: How to Talk So Men Will Listen

February 9, 2010

Lorry I. Lokey Graduate School of Business
at Mills College, Oakland



Did he hear me?

Is he ignoring me?

*What do I need to do to
get someone to notice
me around here?*

*I just threw out that
idea 10 minutes ago —*

now he says it, and he's considered a genius!

These thoughts echo the frustrations of business-women across the nation, according to communication consultant Audrey Nelson, Ph.D. In her February presentation to a sold-out East Bay crowd called "Code Switching: How to Talk So Men Will Listen," Dr. Nelson promoted a new approach to overcoming

the communication challenges that result in aggravation for both women and men.

The approach is called code switching. It is the ability to use your knowledge of two or more cultures or languages and switch between them, depending on the situation, to best communicate your message. Code switching involves acknowledging and understanding gender differences in communication styles, and then blending the two styles into a more synergistic approach to leadership and communication.

Code switching is based on several underlying assumptions: 1) Different is good — we don't all want to be the same; 2) It is not male bashing; 3) Women do not want to become men — it is not about assuming a male communication style; and 4) It is a shared, equal opportunity; both men and women are responsible for successful communication.

Dr. Nelson offered numerous practical examples and tips to help women code-switch:

1. Avoid the indirect compound request. The more words you use, the more you dilute and soften the request.
2. Don't let excessive use of adverbs take over.
3. Maintain and keep the floor. If you are interrupted, get it back with force, balanced by request.
4. Dress for success, not access.
5. Manage the crying game. Pre-cue the conversation, then take a bathroom break.
6. No is not a four-letter word. Earn respect by setting boundaries.
7. Get rid of old messages like, "Good girls are quiet and passive." Speak up, or your needs may not be met.

The program was co-sponsored by Mills College and hosted at the beautiful new home of the Lorry I. Lokey Graduate School of Business. FWA members and guests enjoyed a unique opportunity to network with Mills' students and alumnae prior to the program.

Contributed by: Stephanie Kretschmer

From the Jungle Gym to the Mat

March 4, 2010

San Francisco



Joan Barnes, founder and former CEO of Gymboree, spoke to a sold out crowd at the March FWA Industry Leadership Series luncheon.

"From the Jungle Gym to the Mat" spoke of Joan's journey to the West Coast in a Volkswagen van, to the entrepreneurial path of taking a business from inception to the end zone of going public.

"We almost died a million times, but when faced with having to either come up with a new

strategy or fold, I just had to keep trying" said Barnes. Growing the brand from a pre-school play concept for both toddlers and moms to connect to an international brand in 32 countries with 600 locations required paving new territory and a whole new industry.

"The initial franchise model of Gymboree as a play program was essentially flawed as a business. The customers were thrilled, but the revenues were too small to support the franchises and make a profit," said Barnes. Barnes then turned to licensing, retail stores, and other strategic moves that eventually took the company public.

Living on the edge, Barnes shared that while the external successes were extraordinary, the "superwoman" role of raising kids and raising capital were taking their toll.

"My inner voice was silenced by a belief system that was externally driven. I was at the forefront of the idea that women can 'have it all'!" After crashing, burning, and rising back anew, Barnes took up yoga, and later purchased Yogastudio, opened several locations, and most recently sold to Yogaworks. Barnes' reflected on the true challenges of the fast track and success, and the pioneering story that paved new roads for women. Paving one's own path, recognizing and taking advantage of opportunities when they present themselves, and finding your authentic self and inner voice are key to true satisfaction, fulfillment, and success.

Joan also is a featured speaker nationwide, including Merrill Lynch's National Womens Wealth Management conferences.

Contributed by: Rhonda Diaz Caldewey

Save the Date: Don't Miss These Upcoming FWA Events!

Industry Leadership Series:

Stephen Roach, Chair of Morgan Stanley Asia

Wednesday, June 9th from 11:30 AM – 1:00 PM

Joint lunch program with Women's Forum West. Check the [Website](#) for the location and further details

Professional Development Series:

Top Ten Things Every Manager Must Know About Employment Law

Tuesday, April 20th from 11:30 AM – 1:30 PM

Tracey Merwise, a labor and employment expert presents the Top Ten Things Every Manager Must Know About Employment Law. Tracey discusses the common misconceptions around employment law, such as performance problems, FMLA and termination. She not only shares lessons learned by clients from being guided by these misconceptions, she suggests alternative resolutions, which can help minimize risk.

[Learn more about the event and register now.](#)

Financial Literacy Part II — Co Sponsored by PWC

Wednesday, April 28th, Silicon Valley; Thursday, April 29th, San Francisco

Check the [Website](#) for the location and further details.

Sell without Sounding Like a Salesperson — Why Women Make Better Salespeople

Wednesday, May 12th from 5:30 PM – 7:30 PM

Find out why traditional sales practices turn selling into unpaid consulting and how top professionals sell more without sounding like a salesperson. Chip Doyle will reveal advanced techniques of "trusted advisors" in professional sales situations and explain why business women often embrace and finesse these techniques with more ease than most business men.

[Learn more about the event and register now.](#)

A New Era: Redefining Ways to Deliver Trusted Advice

Thursday May 13th, 11:30 AM – 1:00 PM

In conjunction with the SF Bar Association. Check the [Website](#) for the location and further details.

Webify Your Business

Wednesday, May 19th from 11:30 AM – 1:00 PM, East Bay

Check the [Website](#) for the location and further details.

Women's Leadership Forum – an all day event with CalCPA

Wednesday, May 26th, San Francisco

Check the [Website](#) for the location and further details.

7 Habits of Highly Effective Negotiators

Wednesday, June 16th

Check the [Website](#) for the location and further details.

Networking Series

Speed Mentoring

Thursday, April 22nd from 5:30 PM – 8:30 PM

FWA members ("Mentees") meet during the course of the evening with several women executives ("Mentors"). Our Mentors will spend about 10 minutes with each Mentee. The more specific and focused the questions you ask, the more rewarding your experience will be. Mentees should bring 2-3 key questions about an aspect of their career development. Our topic will be: Are leadership abilities really innate? How to develop your leadership style.

[Learn more about the event and register now.](#)

Silicon Valley Happy Hour Networking

Thursday, April 22nd

Check the [Website](#) for the location and further details.

Lifestyles Series

Jewelry Making with Donna Davis

Thursday, May 6th

Spring is in the air and that's why we're planning a dynamite lifestyles jewelry making party, where you'll learn how to create your own spring necklace with jewelry designer and teacher Donna Davis. Donna will show you how easy it is to design your own fashions to match that new spring outfit or to delight a special someone. This will be a hands-on class where you select the beads, string your design and leave with your new necklace. Space will be limited so look for our announcement, coming soon! Check the [Website](#) for the location and further details.

Scholarship Luncheon

Wednesday, June 2nd

Financial Woman of the Year

Thursday, September 30th

Newsletter Contributors:

Rhonda Diaz Caldewey

Erin McCune

Lucy Carrico

Jill L. Myers

Alison Hightower

Laura Pilz

Stephanie Kretschmer

Sarah Heaslip Whitelaw

Want to contribute to the FWA newsletter?

Please suggest future newsletter topics and/or submit articles to:

Erin McCune, Marketing & Communications Co-Chair,

erin@glenbrook.com