

# WiRC *Together* Again



FOLLOWING  
A COVID-  
INDUCED  
YEAR OFF,  
THE WOMEN  
IN RETIREMENT  
CONFERENCE  
WAS BACK  
IN PERSON  
IN JANUARY.  
HERE'S A  
WRAPUP OF  
THIS YEAR'S  
EVENT.

by  
Megan  
Crawford  
&  
Emily  
Minnich







the DAY BEGAN WITH POURING RAIN AS WE ARRIVED IN FORT LAUDERDALE FOR OUR FIRST IN-PERSON WOMEN IN RETIREMENT CONFERENCE IN TWO YEARS! WE WERE EXCITED AND HAD SUCH GREAT EXPECTATIONS FOR THE EVENT THAT NO ONE EVEN SEEMED TO NOTICE IT WAS RAINING.

With great expectations comes real-life challenges—in this case, the rain kept us from enjoying a rooftop reunion. So instead we moved to the Oceanside Ballroom. It was full of amazing views and no high winds, proving challenges can lead to even better outcomes.

Once the excitement of being back in person subsided, we started with our theme for our time together: “Intentional Networking” led by co-WiRCer Jessica Fox. Jessica was brought back by popular demand

from our Third Thursday event last June.

In her session, attendees were encouraged to find another person in the room they had not met and ask two questions: “what do you do?” and “what is your passion?” There was a brief moment of panic in everyone’s eyes as they realized they were going to have to go mingle with someone they had never spoken to after two years of sitting at home in their pajamas. Surprisingly, this exercise gave everyone the tools

to jump into action, find a buddy, and start networking. We learned that those two questions made the conversation flow easily; by the time we needed to move on to dinner, it was hard to quiet the room. Thankfully, we were able to continue with our intentional networking exercise during dinner.

Once at dinner, the second round of panic set in, with assigned seating at the tables. Using our new intentional networking skills, the conversations were overflowing.

However, the evening did not end there: there were optional activities to get out and enjoy Fort Lauderdale, including the famous Elbo Room, conversations and cocktails at the hotel bar, and ice cream on the beach.

With 80 first-time co-WiRCers, it was important for us to make attendees feel welcome and included even if they didn't know anyone else in attendance. It is always intimidating to go to large industry events and having to scramble to find someone to have dinner with so you don't have to eat alone!

There was no such worry at WiRC—the entire event is programmed so that attendees can continue their days together and have activities planned to build conversations, continue learning, and inspire collaboration efforts going into each evening.

Hopefully, at your next industry event, you will have a connection with someone you met at WiRC!

### What is WiRC?

The Women in Retirement Conference was created by combining two existing events: NAPA Connect and ASPPA's Women's Business Leaders Forum. Now, in our fifth year, all five ARA sister organizations (ASEA, ASPPA, NAPA, NTSA and PSCA) are involved. Clearly, the ARA champions women's initiatives.

This is the place where we come together to learn and grow as we work to help Americans work toward their retirement goals. In our group you will find actuaries, advisors, CPAs, HR professionals, broker dealers and home office team members, plan sponsors, service providers, TPAs, recordkeepers and relationship managers. We operate with one voice and one goal: the professional growth of women in the retirement services industry and the manifestation of the next generation.

### Day 1

We started our first full day with speakers and sessions to continue to connect and collaborate as a group.

## WE OPERATE WITH ONE VOICE AND ONE GOAL: THE PROFESSIONAL GROWTH OF WOMEN IN THE RETIREMENT SERVICES INDUSTRY AND THE MANIFESTATION OF THE NEXT GENERATION.

### Vision and Dreams

L'areal Lipkins started us off with a session on "Helping Executive Women Achieve Their Biggest Dreams." Her session gave us the tools to become clear about our vision and why that's important. She also led us through a workshop to set goals that align with that vision. This generated a mindset to help us focus on what really matters!

### Policy and Legislation

Next, we heard from Kelsey Mayo and the Government Affairs team on how policy and legislation can affect the way we service and administer retirement plans. This led to a lively conversation about how policy and legislation can affect participants—especially women and minorities. This really got the room engaged, and it was great to hear the perspectives of other attendees on why new policies matter. (For more on this session, see "Inside ASPPA" on page 56.)

### Council for Women Panel

The ARA Council for Women joined us on stage after lunch for a panel discussion about "Pathways to Leadership and Navigating Growth." The Council is made up of one representative from each of the ARA sister organizations:

- **ASEA**

Lynn M. Young, EA, MSEA  
*partner/consulting actuary*  
Pinnacle Plan Design, LLC

- **ASPPA**

Shannon M. Edwards, ERPA, QPA, QKA, APA, APR  
*president*  
TriStar Pension Consulting

- **NAPA**

Nicole Corning, CFP®, CRPC®, AIF®  
*managing partner*  
Buckman & Corning Financial Strategies Group, Wells Fargo Advisors Financial Network

- **NTSA**

Kristine J. Coffey, CPC, CPFA™, CRES  
*executive vice president*  
CPE Associates, Ltd.  
SOUTHWEST and MIDWEST, International Consulting

- **PSCA**

Michelle R. McGovern, CPSP  
*director*  
Strategic Operations, People and Culture;  
*director*  
Human Resources and Operations, American College of Surgeons

The ARA Council for Women provides coordinated solutions to women currently in or seeking to join the retirement industry, including events, leadership, mentoring, education and advocacy. The Council is designed to support, strengthen and educate industry professionals who work with ARA on matters affecting women. It was insightful to hear from women who have been successful in the industry how they have navigated their careers.

### Leadership

We ended the day with Darlene Flagg, NTSA's 2021 President, who spoke to us about being a better leader and team player for yourself and other women in the retirement industry. She also shocked us with some eye-opening statistics about the buying power that women have and why we should focus on selling to women. For example, women:

- control \$31.8 billion in global spending;

- account for over 90% of purchases for new homes, food, vacations and OTC pharmaceuticals; and
- account for over 80% of health care purchases and bank accounts.

With all this buying power, women are equipped to make financial decisions, but they still fall short when it comes to saving for retirement. As an industry, we need to focus on women to ensure they are able to retire!

### Wine Time!

After our jam-packed day, we needed to "un-wine." We walked over to the nearby Wine + Garden, a little Italian restaurant where we did a wine tasting and enjoyed dinner under the beautiful string lights in their courtyard. We were able to indulge in conversation and share some Instagram-worthy photo ops. It was a perfect way to end the day.

### Day 2

Friday started with sunrise yoga on the roof. It was a little chilly even for us midwestern girls, but proved to be an amazing way to start the last day of the conference. Thank God there was a Starbucks on the first floor.

### Plan Sponsor Council of America

Up first was WiRC Committee member Gabrielle Turner, CPSP. This was her first WiRC conference representing PSCA, our newly added sister organization. Gabrielle shared insights about her passion: helping people feel included, understood and cared for in order to reach their full potential in an organization. She encourages meaningful corporate culture through recognizing diversity, fostering open communication, and building relationships with her employees. It is always great to hear another perspective when it comes to servicing the workforce of America.

## THANK YOU, SPONSORS!

A huge thank you to the sponsors of this year's event:

- » Marsh McLennan
- » Ascensus
- » Capital Group—American Funds
- » Fidelity Investments
- » HUB
- » John Hancock
- » J.P. Morgan Asset Management
- » Lincoln Financial Group
- » Mutual of Omaha
- » Nationwide
- » OneAmerica
- » PenChecks Trust
- » PensionPro
- » Prudential
- » The Standard

## ARA WOMEN'S INITIATIVES

In addition to the WiRC conference, the ARA's current initiatives include:

### Thrive

Thrive is a mentoring program that launched in 2021. It facilitates mentoring relationships for women retirement professionals interested in developing new competences, expanding their network and navigating career transitions. Whether you're looking for a mentor, willing to be one, or both, this is your opportunity to enhance your connection to the industry.

### Third Thursday

Third Thursday virtual events started in 2020 as a way to stay connected virtually with our co-WiRCers. It is offered monthly and is complimentary to ARA members. The sessions are 60-90 minutes, including time for networking by splitting into small groups. Each Third Thursday experience focuses on one of the four core topic areas: leadership, marketing, practice management or personal growth. It is a great way for women in all parts of the retirement industry to connect and meet with other professionals on a regular basis.

### ENGAGE

The Council partners with ENGAGE to promote women's economic security. (If you haven't heard of ENGAGE or founder Rachel Pearson, check out the group's website at [engagewomen.org](http://engagewomen.org).)

### Advocacy

The ARA's women's advocacy initiative was launched in 2021. One of the biggest goals of all of the ARA women's groups is to give back to the community. For example, the giveaway items (yes, you can win stuff at the conference) were all purchased from women-owned businesses to help get their names out in our community. We have also partnered with "Rock the Street Wall Street," which promotes interest in the financial services field to girls in high school.

If you would like to find out more about upcoming women's events, be sure to check out [womeninretirement.org](http://womeninretirement.org), which houses all of the information on the ARA women's initiatives.





Top left: 2022 Women in Retirement Co-Chairs Emily Minnich and Megan Crawford. Top right: the 2022 Women in Retirement Conference Steering Committee. Middle right (left to right): Conference sponsor Katie Boyer and attendees Amanda Iverson, Michelle Murphy, Megan Crawford, Emily Minnich and Barbara LaBounty. Bottom right (left to right): Emily Minnich, Megan Crawford, Kate Clark, Kara Kidney, Apryl Pope and Nicole Corning.

### Presentation Skills

After a quick break, we were back to hear from Deborah Shames, co-founder of Eloqui. She helped us hone our presentation skills and to seize every opportunity and aspire to new heights. Deborah coaches individuals to identify their strengths, utilize their authentic voice, and drive business. Here's a pro tip from Deborah: Eat grapes to stay hydrated during public speaking. (Sadly, she wasn't referring to the fermented grapes from the night before.)

### Advocacy

Wrapping up the 2022 conference, Pat Wenzel, Immediate Past President

of NAPA, moderated a conversation with U.S. Rep. Maria Elvira Salazar. Rep. Salazar represents Florida's 27th Congressional District and is a champion of women's and immigrants' rights. She encouraged all the co-WiRCers in the room to get involved in their local politics, no matter what the party, so their voices are heard! With her unique style and energy, Rep. Salazar is a forceful presence in Congress. It was an inspiring way to wrap up our last session of the conference.

### Takeaways

As we look back and reflect on our time together, we always like to

provide our co-WiRCers actionable takeaways that can be incorporated into their daily routine. Here are some of the biggest takeaways from this year's event:

- Get clear about your long-term vision and dreams
- Set goals that align with your vision
- Your results reflect your routine
- Think about roadblocks you may encounter before you hit your goal and how to handle them
- Be okay with asking for and accepting help
- The best goals are the ones you have to grow into
- Never stop learning
- Always take a woman with you
- Be authentic, be persuasive, be engaged
- When speaking, know your intention
- Lean on your partners
- Identify and create policies, processes and programs that reflect the unique culture of your company
- Be a champion for women
- Get involved locally and be a voice
- And always double-check the size of your panty hose

As we ended our last session and took the stage as co-chairs one last time, we couldn't help but think about how amazing it has been to see this conference grow into the event that it has become! Looking around the room at all the amazing women who are going above and beyond to serve their clients and help Americans retire was outstanding!

The community that has developed because of WiRC is amazing. You could tell how special it was to meet in person, connecting with friends who were made virtually and creating new connections that developed from our intentional networking. Those new connections were undeniable as we watched everyone join together and say goodbye to their newfound co-WiRCers before they left. **PC**