

AN EVENT FOR WOMEN IN FINANCIAL SERVICES



JUNE 19-20 | CHICAGO  
**WIN FORUM 2018**  
INSPIRING THE NEXT GENERATION





# JUNE 19-20 | CHICAGO WIN FORUM 2018

## INSPIRING THE NEXT GENERATION

June 19-20, 2018 | An Event for Women in Financial Services

The Institute for Portfolio Alternative's (IPA) 6th annual Women's Initiatives Network (WIN) Forum 2018 will bring together leaders from across the financial services industry, for an interactive networking forum to discuss new perspectives on business leadership and inspire the next generation. The IPA WIN Forum spotlights the influence of women professionals, recognizes their incredible achievements and promotes diversity in the financial services industry.

Engage, contribute and prepare to be inspired!

**Location:** University Club of Chicago

**To Register/Learn more:** [www.IPA.com/WINFORUM2018](http://www.IPA.com/WINFORUM2018)

**Early Bird Registration:** available until May 31, **Members: \$99 | Non-Members: \$119**  
after May 31, **Members: \$129 | Non-Members: \$149**

FOUNDER OF ONE OF  
AMERICA'S FASTEST GROWING  
CAREGIVING SERVICES ONLINE.



**Keynote Speaker**  
**GENEVIEVE THIERS**  
Founder | Sittercity.com

"ONE OF THE FIVE MOST  
INSPIRING WOMEN IN AMERICA"  
- NBC NIGHTLY NEWS



**Keynote Speaker**  
**BONNIE ST. JOHN**  
Leadership Consultant | Olympic Medalist  
Best-Selling Author

SPONSORED BY:  CNL Securities

(Note: event times subject to change)

## TUESDAY, JUNE 19

5:00 PM **Registration Opens**

5:30 - 6:30 PM **Opening Cocktail Reception**

6:30 - 7:30 PM **Networking Dinner**  
**Topic:** The Impact of Career Decisions

## WEDNESDAY, JUNE 20

6:30 AM **Registration Opens**

7:00 - 8:00 AM **Breakfast**

8:00 - 8:15 AM **Opening Remarks**

8:15 - 8:30 AM **Inspired to Action (Interview #1): A Discussion on the Impact of Personal Influencers, and How to Manifest Those Lessons in our Careers** A unique series of short interviews with industry leaders will explore the inspirational people who have positively affected their flourishing careers. We will examine the practical aspects of career management and learn how to apply these experiences to your own career.  
**Gloria Nelund, Chairman and CEO, TriLinc Global, LLC**  
**Interviewed by: Katie Spring, General Manager, Financial Communications, Edelman**

8:30 - 9:15 AM **Family Matters: Exploring the Intersection between Mentoring and Business Succession Planning** This session will focus on mentoring and the very real need to foster successful business succession. Through the lens of mother-daughter team Lorretta Elderkin and Erinn Ford we will examine how families can work together to successfully understand their business better, and transition to the next generation of leadership.  
**Erinn Ford, President, KMS Financial Services**  
**Lorretta Elderkin, Founder, Pacific West Securities**

9:15 - 9:30 AM **Inspired to Action (Interview #2): A Discussion on the Impact of our Personal Influencers and How to Manifest Those Lessons in our Careers**  
**Ella Neyland, President, Steadfast Income Advisors**  
**Interviewed by: Katie Spring, General Manager, Financial Communications, Edelman**

9:30 - 10:15 AM **Keynote Speaker: Genevieve Thiers**  
Genevieve Thiers is a disruptor, entrepreneur, speaker and investor. Her first company, Sittercity.com, took America's caregiving services online. Sittercity.com now has millions of users in the US and is growing quickly in global locations, including the UK and Canada.  
  
Genevieve has mentored hundreds of entrepreneurs throughout her career. She is on the board of the CEC, which created 1871 - a co-working space in Chicago where Genevieve frequently mentors and teaches classes. She is also an investor in TechStars and the Firestarter fund, and in several new female-run tech start-ups that target women and lesser-known industries.  
  
She is the author of the book "Love at First Sit" (2007), and regularly writes for NBC.com, the Huffington Post, as well as various tech publications in the Chicago area. Genevieve was recognized by President Bush at the White House as the Small Business Administration Young Entrepreneur Champion of the Year for 2006, and her companies have won over 18 major awards, including the CEC Momentum Award, the WBDC Rising Start Award, a CNN Young Heroes feature, the UPS Out of the Box Award, the INC 500 list, and more.

10:15 - 10:45 AM **Break**

10:45 - 11:00 AM **Inspired to Action (Interview #3): A Discussion on the Impact of our Personal Influencers and How to Manifest Those Lessons in our Careers**  
**Trisha Miller, CEO, Starwood Capital, LLC**  
**Interviewed by: Katie Spring, General Manager, Financial Communications, Edelman**

11:00 - 11:45 AM **Keynote Speaker: Bonnie St. John**  
Paralympic Ski Medalist, Fortune 500 Business Consultant, Rhodes Scholar, Former White House Official and Best-Selling Author Hailed as "One of the five most inspiring women in America" by NBC Nightly News, Bonnie St. John challenges audiences to question their own limitations and provides research-based tools and techniques that re-energize their lives to achieve peak performance. Bonnie has been featured extensively in the national and international media including Today; CNN; Good Morning America; People, Oprah, and Success magazines; and The New York Times. The best-selling author of seven books, her most recent book, Micro-Resilience: Minor Shifts for Major Boosts in Focus, Drive and Energy, outlines a quick, easy and immediately effective program of tools and techniques to give you a competitive edge in today's dynamic world of changes and challenges.

11:45 - 12:00 PM **Closing Remarks**

2018 WIN FORUM AGENDA

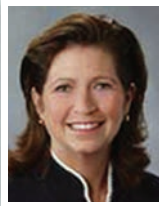
UPDATED 5/18/2018





**WOMEN'S INITIATIVES NETWORK**  
INSTITUTE FOR PORTFOLIO ALTERNATIVES

## GUEST SPEAKERS



**Gloria Nelund**

*Chairman and CEO, TriLinc  
Global, LLC*



**Ella Neyland**

*President, Steadfast  
Income Advisors*



**Erinn Ford**

*President, KMS Financial Services*



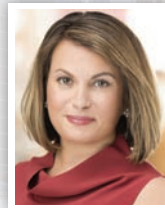
**Trisha Miller**

*CEO, Starwood Capital, LLC*



**Lorretta Elderkin**

*Founder, Pacific West Securities*



**Katie Spring**

*General Manager, Financial  
Communications, Edelman*

## EVENT SPONSORS



**MEDIA PARTNER: REALASSETS**  
ADVISER