

LevelUP

A career and leadership development program supporting women to chart their path to a senior investment decision making role with greater clarity and confidence.



The technical skills and hard work that got you here won't get you there

It's time to level up

We know you aspire to a senior investment decision making role. Where all your hard work translates to greater autonomy, responsibility and impact, doing work you find endlessly stimulating, and earning great money along the way.

The challenge is, opportunities to move into these top roles are limited, take time to come to fruition and depend on senior people who might not yet see your potential - yet. Plus, you're probably not getting clear feedback and/or don't have the time, tools and mentors to help you figure it out.

You need to feel confident in your career trajectory, backed by your leadership, supported by like-minded peers and inspired by relatable female role models who show you how to craft a career and life you love.

You shouldn't have to fit the archetype of an alpha, white, private school educated man to feel assured of reaching your potential and becoming a senior portfolio manager, head of or CIO.



You need

- ▶ To confirm you've got what it takes to be a senior investment decision maker, and what you need to do to get there.
- ▶ Feedback on your strengths and what's holding you back, delivered and coached in a way that's practical and direct.
- ▶ Tools to play your inner game so you can manage insecurities, think more clearly and become an exceptional communicator.
- ▶ Visibility with leadership and their commitment to invest in your growth
- ▶ A support network of like-minded women and inspiring female role models working in investments who can show you the way.



“Before I started this program, I wondered how I’d find the time to do the work. Once I started, I realised I had to find the time. This experience had a huge impact on me. It changed how I lead and has given me more confidence to execute on our growth strategy”

Kellie Wood, Head of Fixed Income,
Schroders



“This program gave me tools that help me think more clearly. I now have the confidence that any problem can be solved and there are frameworks to fall back on, as well as an ongoing supportive network that speaks the same language.”

Amy Li, Assistant Portfolio Manager –
Strategy & Asset Allocation,
Victorian Funds Management Corporation

Informed by and designed for ambitious mid-career women in investments

In an ideal world, your work would speak for itself. The truth is, no one cares as much about your career as much as you do. *LeveUP* is here to put you in the driver's seat. Here's how.



Career clarity and confidence

Get crystal clear about who you want to be as an investment leader and how you're going to get there.



Self-belief and professional conviction

Know your strengths, tame your inner critic, back yourself, and enjoy your work and life more.



Improve your effectiveness, influence and impact at work

Determine what's getting in the way of you being the best investment leader you can be and how to realise your full potential.



Build a supportive and influential network

Strengthen your close contacts of peers, role models and mentors across the industry, and be part of a group that will tell it to you straight and cheer you on.



Leadership visibility and buy-in

Use your career clarity and growth plan to raise your visibility, and secure commitment from the people who matter.

A 4 month program providing tools, insights and connections that compound your growth for life

Focused on the inner game of investing, leadership and careers. Comprising in-person workshops and 1 on 1 coaching, plus peer learning and access to role models and mentors, with your employer's buy-in and input.

Kick-off and prep work

28 March, 10 -11 am
or 11 April, 12- 1pm

- ▶ Virtual call sharing key concepts and prep-work (45 mins)
- ▶ Nominated leader sponsoring participation briefed on process and their role

Follow up actions

- ▶ Enneagram profiling (40 mins) and 1:1 debrief (90 mins)

Workshop 1 and mentor dinner

30 April, 9-5 pm plus dinner

Full day in-person workshop on **mastering the inner game to achieve career and growth goals** followed by dinner with female investment leaders.

Follow up actions

- ▶ Check-in with sponsoring leader (45 mins)
- ▶ Feedback requests (30 mins)
- ▶ Career strategy self-reflections (2 hours)
- ▶ 1:1 coaching (50 mins)

Workshop 2 and mentor dinner

11 June, 9-5 pm plus dinner

Full day in-person workshop on **leadership purpose and career strategy** followed by dinner with female investment leaders.

Follow up actions

- ▶ 1:1 coaching (60 mins)
- ▶ Check-in with sponsoring leader (45 mins)
- ▶ Interview role model on their career strategy (45 mins)

Workshop 3 and mentor dinner

23 July, 9-5 pm plus dinner

Full day in-person workshop on **influencing stakeholders and impactful communication** followed by dinner with female investment leaders.

Follow up actions

- ▶ Check-in with sponsoring leader (45 mins)
- ▶ Ongoing peer and mentor connection

Curating female role models, mentors and advisers who can support your growth

You need to see who you want to be. That's why you need a support network of amazing women who have carved the path you're now following and are available to share the lessons, insights and wisdom that supported their success.

We're working to create a critical mass of at least 12 role models and mentors who will attend 1 – 2 networking dinners and be available to mentor or share insights with you about their career success.

Mentoring will be based on chemistry, rather than structured matching, and will be flexible in format, as determined by connection and capacity. For example, some mentors will be available for one-on-one Q&As, others will be available for a longer-term relationship.

Whatever way you engage these incredible women, Future IM/Pact will support to make the most of the opportunity.

2025 role models and mentors will be confirmed by mid December 2024.

2024 role models and mentors

Kate Howitt

NED and Former PM at Fidelity

Nicole Kidd

Head of Private Debt, APAC, Schroders

Kellie Wood

Head of Fixed Income, Schroder

Bianca Rose

Senior Portfolio Manager, Morningstar

Lucy Steed

Chief Executive Officer, Melior Investment Management

Louise Bradshaw

Senior Manager, Responsible Investments, Aware Super

Katrina Khoupong

Portfolio Manager, Acadian Asset Management

Kate Misic

Head of Alternative Investments and Real Assets, Telstra Super

Isabelle Demir

Managing Director, Infrastructure

Joanna LeFevre

Associate Director, Gresham Capital Partners

Alison Chan

Investment Director – Sustainable Finance, Metrics

Anita Costa

Portfolio Manager – Australian Small Cap Equities, IFM Investors

Anna Meuthen

Senior Portfolio Manager, Equities

Talieh Williams

Responsible Investments leader

Kylie-Anne Richards, PhD

Investment Director

Megan Ford, Head of Investor

Intelligence, Future Fund

“Reframe and embrace imposter syndrome as a sign you're being challenged and working hard in a role that matters to you.”

Kate Howitt

Designed for organisations committed to investing in their high potential women

Great leaders know they've worked hard to recruit talented women into their investment team, and now they need to keep them. Investing in your growth and development is key.

Designed for

High potential mid-level female investors with around 6-10 years' markets / investment experience.

You're likely to be senior analyst / associate to deputy PM / director but can be more or less experienced.

What's most important is that you:

- ▶ Are looking to take your career to the next level
- ▶ Have an appetite for growth
- ▶ Are committed to doing the inner work that will unleash your full potential at work and in life.

Female only program. Minimum 12 participants per program.

Participants receive

- ▶ Enneagram personality profiling report.
- ▶ 3 x in-person workshops with industry peers.
- ▶ 3 x networking dinners with female portfolio managers acting as role models and mentors (through organic connection).
- ▶ 3 x 1 on 1 coaching (including 90 min Enneagram debrief and 2 x 60 mins).
- ▶ Workbooks and insight tools.
- ▶ Leadership buy-in for their participation, reinforced by monthly check-ins on progress.



Participant fees

\$5,900 plus GST

10% discount for Future IM/Pact partners and 100 Women in Finance members

Most employers will have a development budget that can fund external programs – either in full or in part.

Use this program information to secure your participation and let us know what else we can share to support your business case.

Designed and facilitated by a leadership expert with extensive industry knowledge

We get you

We know what it's like to feel burning ambition laced with fear that you might not be good enough to crack into senior leadership. If having a family is on the agenda (or already happening), we get you're probably worried that being a mum will derail what you've worked so hard for.

I've been working in and around the funds management industry for over 20 years, and have spent the past five years helping women launch and build a fulfilling investments career, and a flourishing life.

That's how I know you need to invest in you. You need someone to help you reflect deeply on where you want to take the next decade of your career and life, and structure your thoughts

into a coherent plan, informed by clear and actionable feedback, and supported by the people who matter.

I will share tools that cultivate the deep self-awareness that's essential for your growth, and the self-belief you need to finally tame your inner-critic. All wrapped up in a learning experience shared with like-minded peers, and supported by inspiring role models and mentors who can provide fresh perspectives and make the journey way more fun.

Reach out if you want to talk through your context and how this program can support your growth.



**Reach out to find out more,
or to register**

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