

# Agenda

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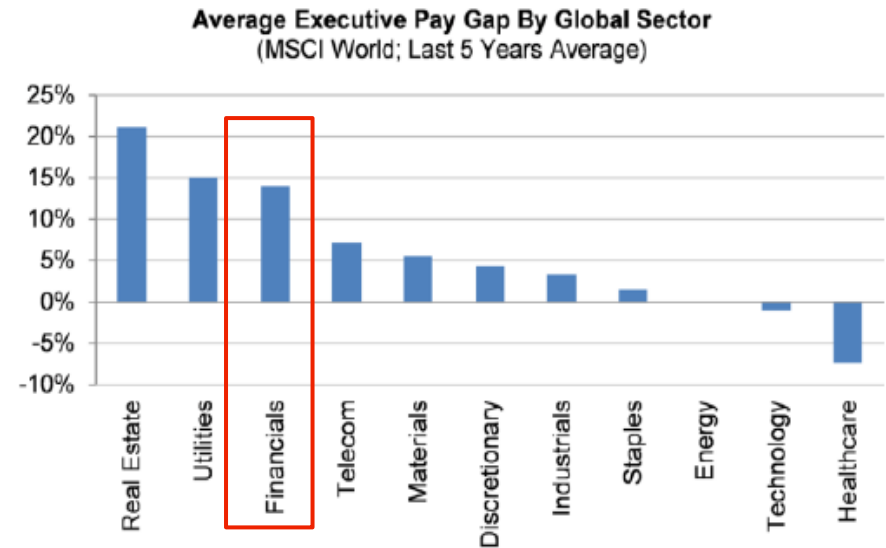
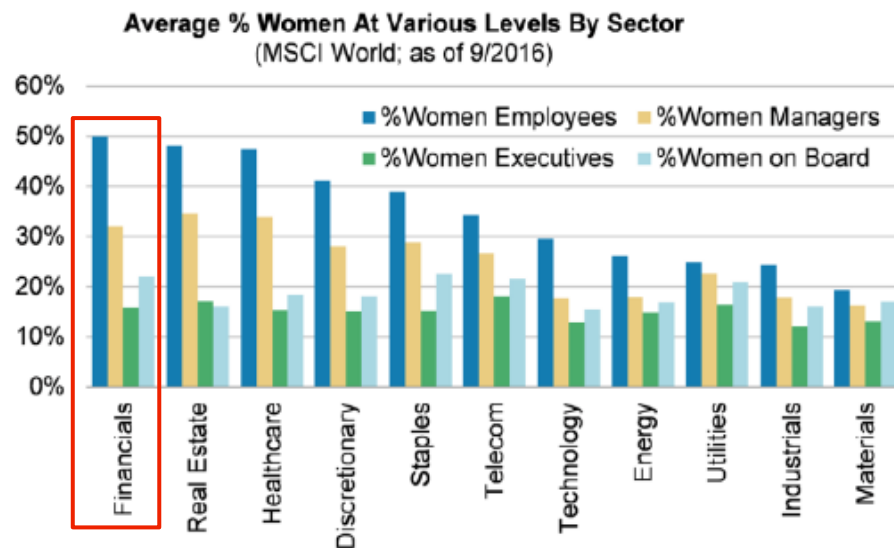
Gender Diversity

What Women Want

The Wealth Management Conversation

# Gender Diversity in Financials

- On average, **highly gender diverse companies have outperformed** their low diversity peers
- When comparing gender composition across industries, Financial Services appear to have the greatest diversity (50% women/ 50% men); however, when **comparing diversity at higher ranks, gender empowerment and equality in pay**, Financial Services are no longer distinguished



- Financial Services lags other sectors in terms of **hiring rates of women, promotion rates of women and higher exit rates of women** relative to men
  - At this rate, the Financials sector will not reach 30% female executive committee representation until 2048
- Based on what we know about gender diversity and the results of companies who encourage greater gender diversity, **Financial Services is missing an opportunity**

# What Women Want

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2%

of wealth managers  
treat and service  
women as an  
individual client  
segment<sup>1</sup>

30%

of the world's private  
wealth is held by  
women<sup>1</sup>

77%

of women want to  
invest in organizations  
with diversity in senior  
leadership<sup>2</sup>

90%

of women want to  
invest in social  
wellbeing<sup>2</sup>

49%

of women value an  
advisor who takes the  
time to educate them<sup>2</sup>

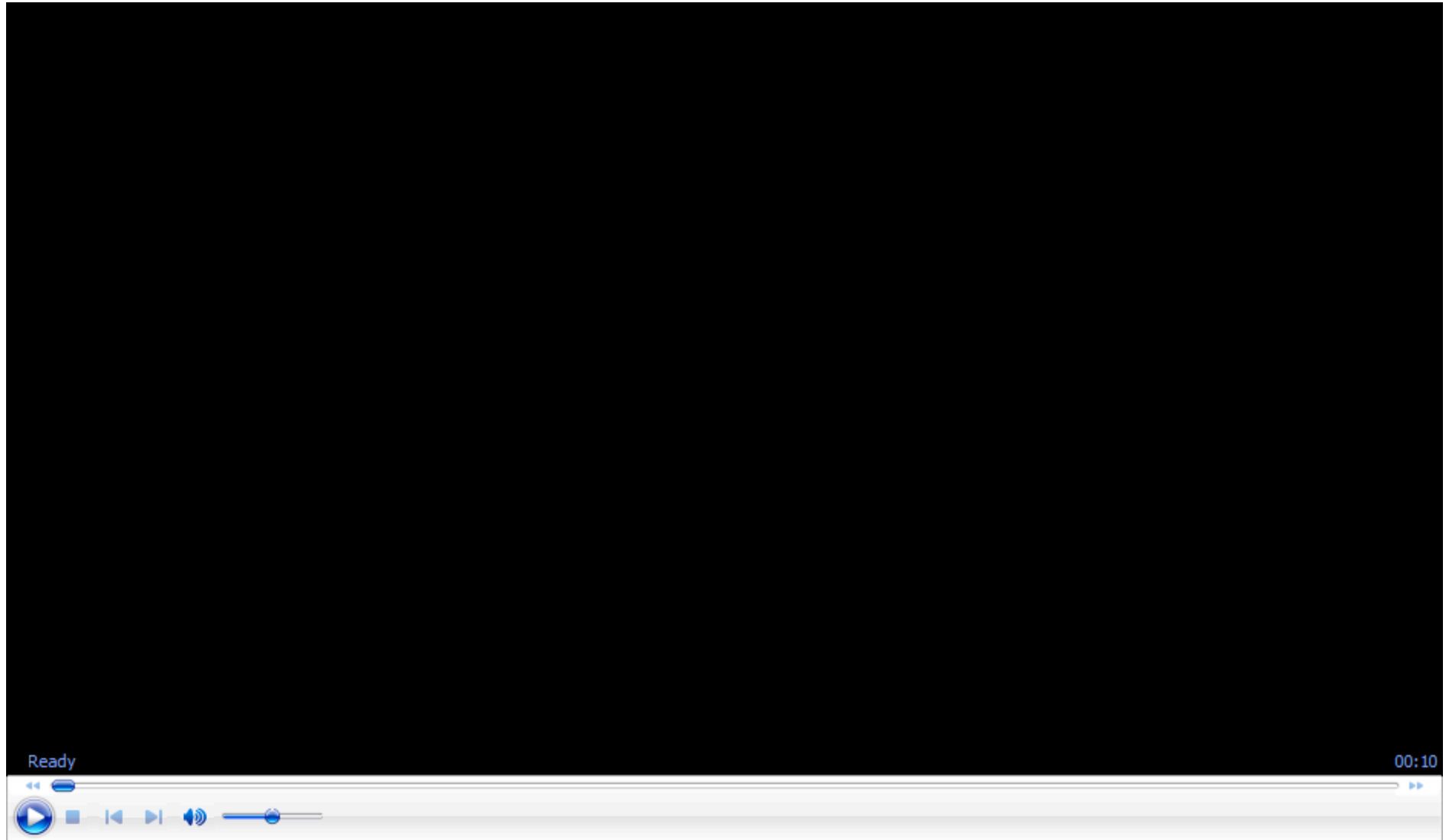
41%

of women want their  
advisor to align their  
life and financial  
goals<sup>2</sup>

# Life's Questions

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[Video](#)



# Your goals and objectives define *why* you invest...

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**1** What do you want to accomplish in your **life**?

**4** What are your main **concerns**?

**2** Who are the **people** that matter most to you?

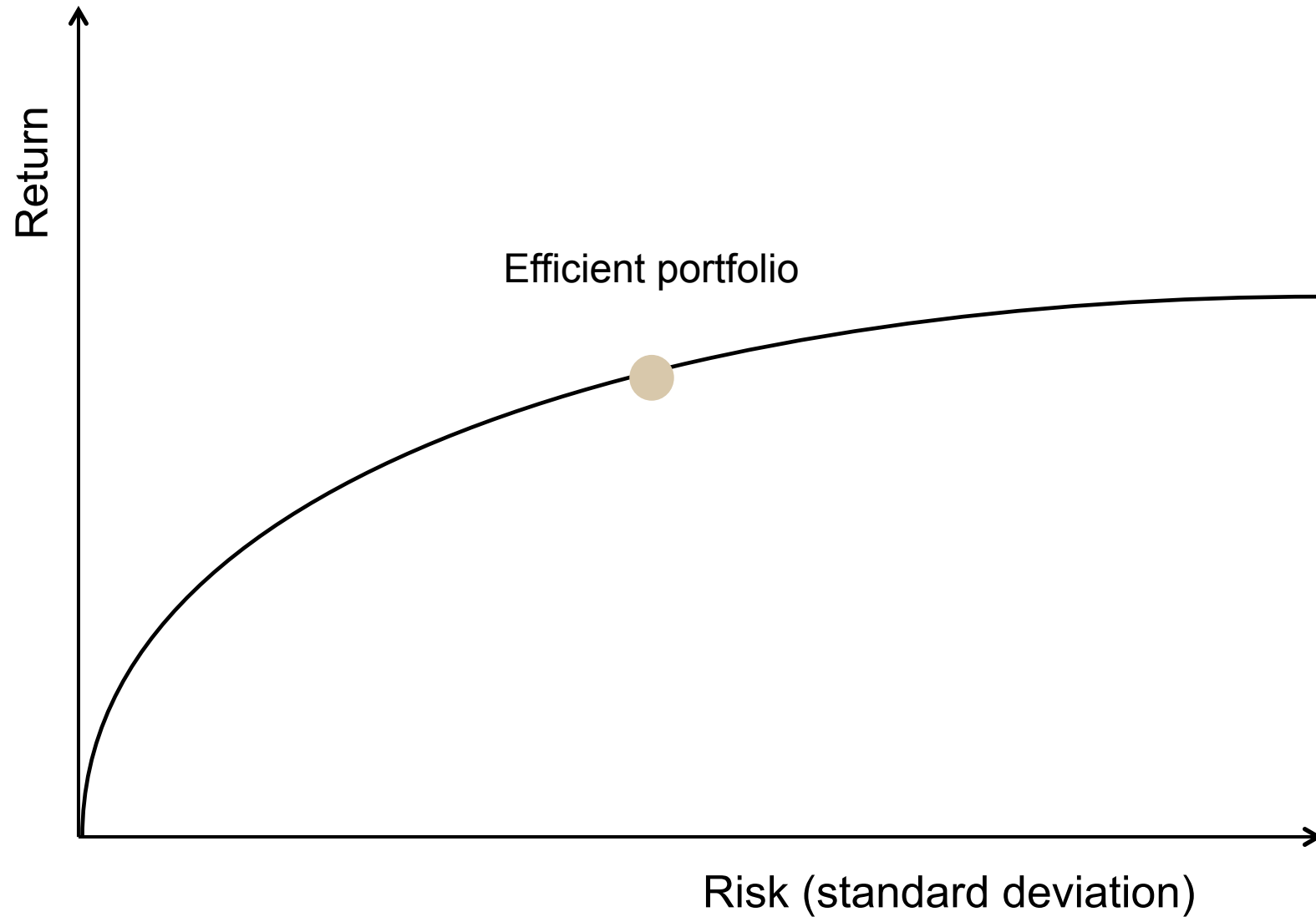
**5** How do you **plan** to achieve your life's vision?

**3** What do you want your **legacy** to be?



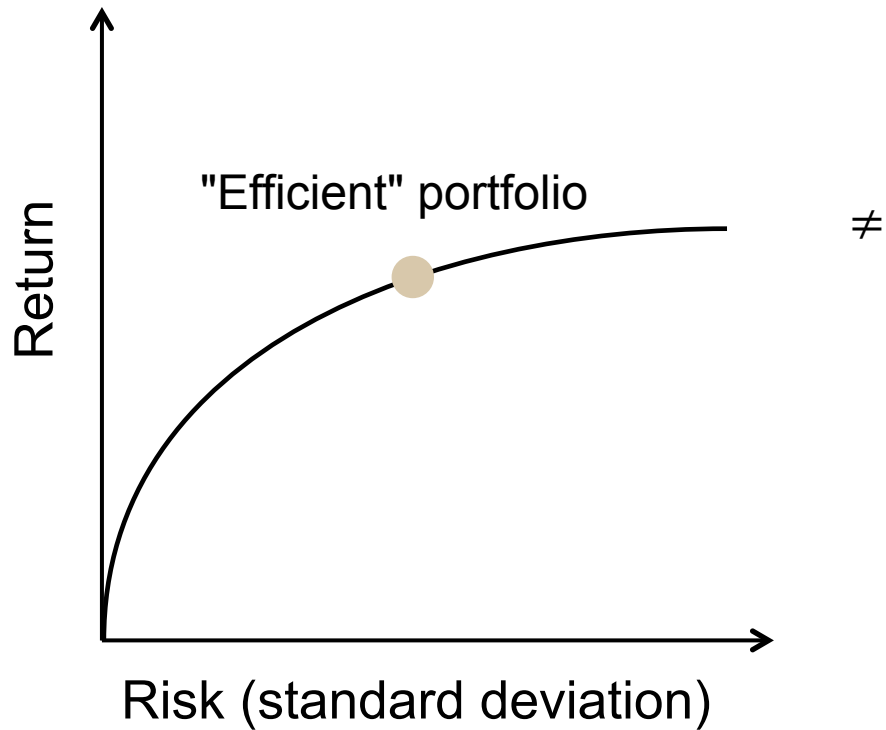
...but the industry uses a simple function...

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# ...that doesn't incorporate goals...

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Source: CIO WM, Americas

-  *Retirement*
-  *Vacation*
-  *Grandchildren*
-  *Education plan*
-  *Healthcare*
-  *Wedding*
-  *Second home*
-  *Renovations*

# ...so we're changing the conversation...

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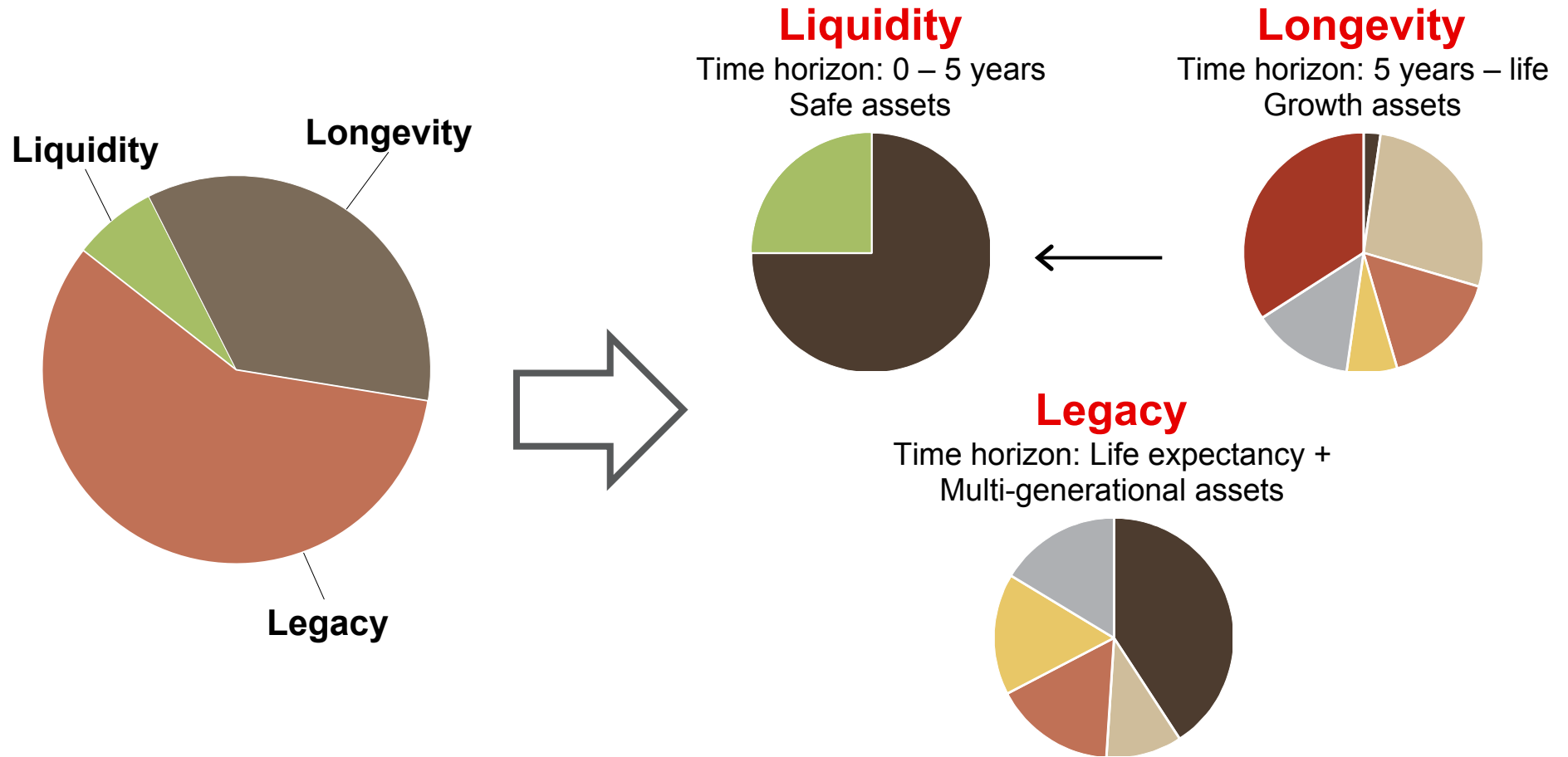
Your goals should form the basis for nearly all investment and estate planning decisions

- Financial independence
- Family
- Healthcare
- Career
- Self improvement
- Lifestyle
- Travel and leisure
- Society and environment
- Social engagement
- Control





# ...to align your assets with current and future goals



# Invest with an impact

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- "SHE" ETF, gives exposure to companies that **demonstrate greater gender diversity** with senior leadership than other firms in their sector
- Rethink Impact – **UBS Exclusive** venture capital fund that focuses exclusively on companies with at least one woman in a key management role – **raised \$75M**
- The PAX Ellevate Global Women's Index Fund is the first mutual fund that invests in companies based on their ability to **advance women** through gender diversity on their boards and in executive management
- UBS and Rent The Runway have **announced an expansion to their joint venture**, Project Entrepreneur, to include five winners that will be selected to win \$10k each and be invited to participate in the Project Entrepreneur five-week Accelerator Program