

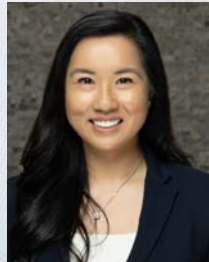
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THE MAGAZINE FOR WOMEN ADVISORS | FALL 2022

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Leading by example

We all have people in our lives whose experiences helped shape us. Whether our paths crossed naturally or we purposefully sought their guidance, their words had a meaningful impact on the course of our lives.

That's the power of mentorship.

And that's what I love about the women who shared their stories for this issue of *Aspire* magazine – their paths to careers in financial services were distinct, but the lessons they learned and insights they gained offer something for us all. These women advocated fiercely and successfully for their vision. In telling their stories with candor and humility, they allow us to benefit from their experiences.

As you will read in this issue, transparency and ongoing support are keys to a meaningful mentorship. When we are honest with someone, and our honesty comes from a place of caring, we can help them reach their fullest potential – to achieve greatness.

The powerhouse women in the *Aspire* spotlight for this issue faced challenges – we all do. I hope their insights, their determination and their joy for the journey inspire you. You might even read something that contributes to your own journey.

Onward,

Renée

RENÉE BAKER, DBA, RCC™

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Owning your *journey*

How following her interests,
landed **Karen Coyne, CFP®**, here



Karen Coyne's path to a career in financial services was anything but direct. "I've always been one to just follow my interests, even if they seem disconnected," she says. "When I look back, I see all of these separate pieces kind of come together."

That paints the picture of who Coyne is. She recognizes that success has more than one look – because she's living it.

This principle is central to her practice – her success is a bigger story than assets under management or production. "There are so many ways we make an impact in this work that can't be measured or that are very difficult to measure," she says, "Like how we reduce anxiety for a client by virtue of having these financial conversations, helping them become aware of potential issues or maybe just become more financially organized."

The importance of having a voice of financial reason is something Coyne understands on a personal level. When she was just 15 years old, her father was killed in a car accident and she became a de facto financial advisor for her mom. "She didn't have a team and we weren't wealthy by any means, but my parents had done just enough planning to make sure we weren't left destitute. I tried to help as best I could at the time."

That experience stuck with her – and would one day inspire her business.

THE WINDING PATH

As an undergrad, Coyne studied art history. She says she knew she was never going to be a museum curator or an art historian, but it interested her. So, she followed her passion. And it gave her the opportunity to live and study in Paris. After graduating, she began teaching English overseas and working on a master's degree in education. Throughout her early career journey, she saved money and knew it was smart to invest. She connected with a financial advisor who made a big impression.

"It stood out to me, first of all, that she was a woman and that she had a background in education. She was not an accountant by trade. She didn't have a business degree or an econ education," Coyne says.

"I realized she didn't take a traditional path either, so maybe there's something here. I kind of recruited myself actually, which I don't think happens too often. I asked her to tell me more about her work – and that's how it happened. I just feel like the stars aligned and the dots connected, and it definitely sparked something."

Coyne knew firsthand how a career in financial services would help others, and she was empowered by meeting someone a lot like her who was already doing it. "I was interested. I thought, 'She learned it; I can learn it. I can do this.'"

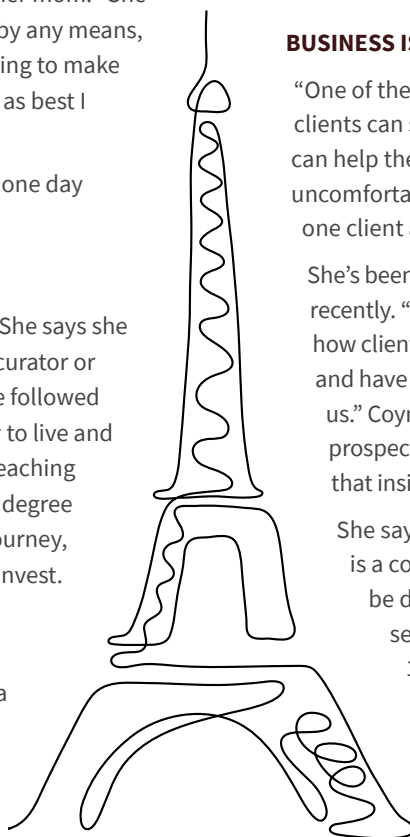
Coyne jokes that she's not sure she really knew what she was getting into at the time, but she wouldn't change it for the world. It's all part of the masterpiece she's still working on.

BUSINESS IS NEVER "USUAL"

"One of the things I really enjoy is being that person clients can speak to who meets them where they are. I can help them feel comfortable in a landscape that is very uncomfortable for many – and reduce some of that anxiety one client at a time."

She's been thinking about reducing clients' anxiety a lot recently. "I think we as advisors sometimes take for granted how clients feel when they schedule their first meeting and have to bare themselves and all of their finances to us." Coyne understands that it can be an uncomfortable prospect even for the most successful clients. She's made that insight one of the ways she differentiates herself.

She says she hears all the time that financial services is a commodity. Her response? "It's so important to be distinctive and create a distinct brand. What separates you and makes you different from the 10 other advisors in your town? For me, lately, I'm really enjoying telling the story of the work we do as advisors, because I feel like it's still very misunderstood. There's still a whole universe that thinks we just buy and sell hot



(continued on next page)

"Success
has more
than one look!"

– Karen Coyne, CFP®



stocks," she says. "So, I like to shine a light on how we're actually impacting lives."

It's also an evolution. When Coyne came to Raymond James in 2007, her business looked very different than it does today. She worked with her ex-husband and his father, so there were other parties to negotiate with when it came to the practice's brand.

Now, she has free reign. And she's found her groove.

STRONG VOICES, EMPOWERING OTHERS

Coyne is supported by an all-women team, and although this wasn't an intentional choice, she does feel that clients seek her out because of it. "Some women only want to work with a female obstetrician, or they only want a female massage therapist. They just feel more comfortable. In this profession, that happens a lot as well," she says.

She highlights that safety and belonging are basic human needs – and so, they're basic client needs. Clients need to feel that interpersonal security to open up and share sensitive financial and personal information. "Women are well-equipped to have these conversations. We need more women and more diversity in this business, and this is an incredible time to start a career in the field," she says.

After a tough couple of years, many people want to reconnect with their purpose in life instead of working for a paycheck. Coyne says, "The 'great resignation' or the 'great reset' – whatever you want to call it – is happening at the same time as the 'great wealth transfer.' I've been hearing about this for the past 20 years, and it is now happening. It's alongside a graying advisor population seeking to grow their teams and build succession plans. So now is the time!"

Coyne feels strongly that attracting more women to the field means a paradigm shift. "We can't do business the way we've always done it – focusing on targets and higher production – and expect a different result," she says. "If I hadn't moved to Raymond James, I probably would have left the field. I know this is true for many of the women advisors here."

Listening to and elevating women's voices is something that's become very important to her – and something that's helped her find her own. Coyne was honored to be asked to join the Raymond James Women's Advisory Council and the Sustainable Investing Advisory Council, but at first, she

wondered why. “I’m sure there are other advisors who know a lot more, do a lot more, but then it’s like, ‘Karen, you’re the one who says all the time that success has more than one look!’”

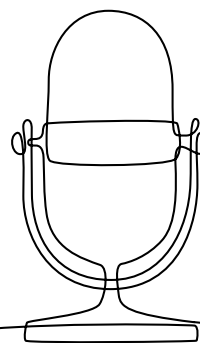
One success she recently celebrated was her Raymond James anniversary, and it’s had her reflecting on her career journey thus far (and planning for the future). She says that if she could’ve changed one thing about her path – one thing for women everywhere – it would be perfectionism. “We are holding ourselves back when we try to be perfect. You can’t move forward if you’re afraid of making a mistake.”

“This idea of failing forward – it’s even a hashtag – didn’t exist in the ‘80s. When I was growing up, we were all about looking bigger and more forceful than we were with shoulder pads and hair out to here. Failing forward was not an option. I think it’s such a beautiful thing that it’s so widely embraced now – and that the thinking around failure has changed.” Her own willingness to test new waters without fear of failing has led her to two new roles alongside her advisory business: podcast host

(Money Without Math) and upcoming author (she’s in the midst of writing her first book).

She offers this advice to fellow women advisors who’ve inspired her and who she hopes to inspire in return: “Put yourself out there. As you do more of it, you’ll get more comfortable with it and learn what resonates with you and your audience. You don’t have to be everything to everyone, but you need to be true to yourself.”

Karen Coyne will be doing the same right alongside you – wherever it might take her. 🎧



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“You are your greatest asset. No one can take you away from you unless you let them.”

That’s what **Lazetta Rainey Braxton, CFP®**, **MBA**, believes and she has acted accordingly throughout her life.

In high school, Lazetta Rainey Braxton directed her seemingly endless energy toward an array of ambitious endeavors. She was a basketball player, a cheerleader, in band and head of the Beta Club.

She also understood the value of money and contributed to the family’s coffers through two part-time jobs.

“My parents graduated from high school and had me,” she said. “As the oldest, I saw them struggle with their money.”

It was this struggle that cemented Braxton’s conviction to carve out a different path for herself – and for her family.

Since then, her career has been marked by personal achievements and collective triumphs. She has, of course, faced her share of challenges. But overcoming them has only made her more confident in her abilities, more determined to champion others like her and more hopeful for what’s to come.

THE BIRTH OF A DREAM

After graduating from the University of Virginia with a bachelor’s degree in finance and international business, Braxton accepted a role as an internal auditor at Marriott.

“I loved it,” Braxton told Aspire. “I got to travel, stay at Marriott and Ritz Carlton hotels and really understand the mechanics of a business.”

But she yearned for a job in personal finance and eventually landed in wealth management after holding roles in corporate accounting and investment management. It was there that she learned the intricacies of serving ultra-high-net-worth clients, which led her to Melissa Hammel, a CERTIFIED FINANCIAL PLANNER™ (CFP®) professional who eventually inspired Braxton’s next move: Financial Fountains.

“When I got my MBA [from Wake Forest University], I created a business plan for my firm, Financial Fountains.

“At the time, it was geared toward churches and endowment management ... particularly because in the Black community, the church has been a central force in economics, education and business.”

Through a mentorship relationship with Hammel, Braxton decided Financial Fountains, which hadn’t yet come to fruition, should specialize in serving middle-income Americans. To ensure she properly invested in her plan, she quit her job and spent the next two months studying for the CFP® exam while balancing being a new mom.

She passed the notoriously arduous test – which typically requires four to six months of preparation – in November 2007. By July 2008, Financial Fountains had launched.

A REMOTE PIONEER

Braxton recognized the power of working remotely before the pandemic forced businesses everywhere to follow suit.

After relocating about every four years for her husband’s career, living in places like New York City, Chicago and Baltimore, she was well-acquainted with the challenges of starting from scratch.

“I saw my parents’ experience, I noticed the racial disparity, and I knew I wanted to help people achieve their wealth and retirement goals despite racial oppression.”

“That’s very difficult for a business owner, especially for a woman of color in the segment I wanted to serve,” Braxton said.

Finally, technology started catching up with her vision of a business that wasn't limited to any one place. And by the time she joined forces with Rianka Dorsainvil, a CFP® and fellow woman advisor of color, to found 2050 Wealth Partners in 2020, Braxton and her business were fully remote.

EMBRACING HER “WHY”

Braxton's drive to found Financial Fountains and eventually co-found 2050 Wealth Partners was partly rooted in her parents' money struggles. She often calls it her “why.”

“I cannot separate the fact that racial oppression was very much a part of my hometown experience,” she told Wake Forest University in an April 2022 interview.

“I saw my parents' experience, I noticed the racial disparity, and I knew I wanted to help people achieve their wealth and retirement goals despite racial oppression.”

Fittingly, the name of 2050 Wealth Partners was inspired by a 2008 report from the U.S. Census Bureau predicting that minorities will become the majority population in the U.S. by the year 2050 (although current projections suggest it'll happen even sooner).

As a Black woman, diversity, equity, inclusion and belonging, or DEIB, have been intrinsically tied to Braxton's professional experience.

She recalled an incident in the late 2000s when she was presenting a proposal to a prospective client who used the N-word in front of her colleagues. Despite the fact that she held a vice president title, Braxton's firm did nothing to defend her. They added insult to injury by signing the client.

“They wanted to brush it aside,” she said. “They knew I was interested in the mass affluent, so they said, ‘We can start a new service that you can lead under our umbrella.’ Are you kidding me?”

The experience deepened Braxton's conviction to open her own firm. Now, she hopes to spare others – marginalized advisors and clients alike – from similar ordeals.

“My advocacy is anchored in humanity, in people, in reminding institutions that they are a consortium of people,” Braxton said.

“Their values, the direction that they're leading people and how they are managing human capital – those factors are really driving businesses and should be their center of focus.”

That's the reason she launched her consulting firm, Lazetta & Associates, in 2020 – to help registered investment advisors (RIAs) nurture their greatest asset, their people.

DEMYSTIFYING DEIB

Braxton believes bias can hold businesses back from pursuing DEIB initiatives even if it means forfeiting clients.

According to a McKinsey & Company study, firms with diverse executive teams are 33% more likely to experience industry-leading profitability. But lack of diversity persists in financial planning.

Braxton sees a similar bias in impact investing. Despite data proving otherwise, many investors assume their portfolios will take a hit if they focus on sustainable assets.

“We've seen the numbers time and again. Yet the argument against impact investing and investing in people has been the same for 20-plus years. Gaslighting happens because those who are in charge of the decision-making drive the narrative.

“If you have enough people driving the narrative, the narrative becomes reality, even if it's not fact-based.”

While that narrative temporarily shifted following George Floyd's murder, Braxton points to the trap of businesses “window dressing” instead of focusing on “invisible occurrences that impact people's livelihoods and therefore their lives.”

“George Floyd represented a humanitarian crisis,” she said. “However, it was a momentary crisis for businesses. I can already see it's in the back of their minds.”

Investors, on the other hand, haven't been as quick to forget.

“We are seeing trends that Gen Z is being very mindful of the impact their money is having. So the question is: How do you,





“How are you caring for yourself? How are you growing and being nice to yourself? Because that’s going to show up in everything you do.”

as a business, position yourself now and in the future to clients who are making thoughtful choices about who they want to partner with?”

MANAGING MONEY WITH IMPACT

Just as she encourages companies to invest in their most precious resource – their people – Braxton emboldens her clients, particularly first-generation wealth builders from underserved populations, to invest in their greatest asset: themselves.

“I’ll use me as an example. As a Black woman, if I’m only getting paid 62 cents on the dollar of a white man for the same work – even more work – how can I ever get ahead?”

“What we do is ensure that our clients know their worth. We start with basic questions like, ‘What is your title? Where do you fall in the compensation spectrum for your role?’

“Even if we don’t have what the employer offers, we can research what the market considers fair for their salary, and we help them negotiate and feel confident about their compensation.”

WHAT MATTERS MOST

Fueled by her desire to make a difference, Braxton has amassed a decorated list of accomplishments since those high school days when she worked two part-time jobs.

She’s a successful entrepreneur. She helped her parents comfortably retire. She’s one of just 1,652 Black CFP® professionals (1.8% of all CFP® professionals, according to the CFP Board).

She’s a celebrated public speaker, a Wall Street Journal and CNBC contributor, a sought-out financial expert.

But when you ask Braxton her proudest achievement, she goes back to family, particularly her daughter, Karis.

“With DEIB, you’re under the notion that everyone has something to contribute at any age. With Karis, I’ve really tried to pay attention to her personality, her view on the world ... and she has also helped me become a better version of myself.

“She sees me up close, and there’s been nothing greater than that.”

PEARLS OF WISDOM

Should Karis or other young women come to Braxton for advice on being an entrepreneur, she would encourage them to develop meaningful relationships, whether that’s with sponsors, mentors or other women in the same position.

She would also stress the importance of being kind to yourself.

“Women have a tendency for perfectionism, and it doesn’t serve us well. We overcompensate in our work to our detriment as an attempt to be seen and appreciated by our colleagues. I believe a women’s gaze should be on herself: What do you think about yourself? How are you caring for yourself? How are you growing and being nice to yourself?

“Because that’s going to show up in everything you do.” 🎧

Driven by the
mission

Kim Jenson's life and career have been testaments to the importance of perspective



The lodestars of our lives are rarely unfading, our touchstones are rarely unmovable, and our big pictures are not glass-encased masterpieces but eclectic chalkboard sketches. Through them, however, we can find clarity, said Kim Jenson, whose life and career have been shaped by this understanding.

As one might expect of an executive at a firm whose principles are rooted in long-term thinking, Jenson, the chief operating officer and a senior vice president of the Raymond James Private Client Group, is a big believer in the power of goal-oriented decision-making, and a student of how goals can and should change over time.

“Through life, you have to keep the big picture in sight,” she said, “to move things forward, make a difference, bring people together and achieve objectives, that’s really where the power lies. Sometimes the big picture changes, so we have to prioritize and reprioritize.”

As she has advanced her career, this has remained her guide. Like anyone living in a complex, everchanging world, she’s faced moments where she had to decide, among many issues, where to focus her efforts. She’s had to figure out if the battle in front of her was really worth fighting.

“I am constantly asking myself, ‘How does what I am doing right now impact our primary objectives and shared goals?’ If it’s not moving those goals forward, you have to ask yourself what priority it should receive. It’s an approach that works with your career, and the relationships with your family and your friends.”

Still, the answer can be unclear. Sometimes similarly important goals compete for the same finite time. For that, she offered a second litmus test: “Am I getting energy from this?”

It’s another way to figure out whether you are maintaining equilibrium in your life, she added. Work-life balance, as with all things, is hardly static. In the early days of her career, earning a college degree on nights and weekends and raising her young son, she had to remain constantly vigilant about her priorities and where she was allocating time and energy – the experience of many working parents.

“You’re the best judge of whether you need to adjust,” she said. “Your balance changes depending on where you are.”

THE RIGHT PUSH

In 2016, Jenson was asked by the Chicago Business Journal to describe herself in one word. At the time, she was a managing director and complex director for UBS Wealth Management. She was being recognized as one of the publication’s 50 Women of Influence.

“Determined,” she had responded.

We asked her how she came to see that as one of her defining traits. She said she thinks of it as being mission-driven.


“I think that came from raising a child as a single young woman. We didn’t have any room for waste. We had to keep putting one foot in front of the other and growing and learning and problem-solving. I didn’t have time to sweat the small stuff. Luckily for me, it perhaps became a habit,” Jenson said.

“Through life, you have to keep the big picture in sight.”

In 1978, when her son was two, Jenson took her first job in finance as the secretary for the president of a small community bank in her native Minnesota, a man named Mark W. Olson. It was an opportunity when she needed one; she had no idea it would be the launch of a 40-plus-year career.

Within that first year, she was writing real estate appraisals, encoding and filing checks, and handling the myriad affairs that kept the operation and the president’s work running smoothly. But soon, Olson told Jenson it was time for her to move on. In their land of 10,000 lakes, he said she was ready to find a bigger one. He called some associates at Norwest Bank in Minneapolis and made introductions.

“I often think about how unselfish that was,” she said. “I was a really good secretary! I couldn’t believe he wanted to give me up. He was really unselfish in his approach and so encouraging. He helped me see the bigger world.”



“Over the years I found the formula: hard work and understanding the big-picture objectives.”

In time, Olson, too, would expand his world, in a journey that saw him become a member of the U.S. Federal Reserve Board of Governors and then chairman of the Public Company Accounting Oversight Board.

“He gave me the vote of confidence I needed to make that next step,” Jenson said of Olson. “The rest was up to me. Over the years, I found the formula: hard work and understanding the big-picture objectives. If I could plug into the big-picture objectives and move the organization forward, I could thrive and grow.”

THE GOOD KIND OF TERRIFYING

Jenson’s father, Jimmy Jenson – “the Swingin’ Swede” – was a career musician and entertainer in Minnesota with live performances, a TV show, a Saturday night radio broadcast and a catalog of 12 albums. He gave her some advice about pursuing dreams.

He said, “It’s good to be a little nervous when you take the stage.” It’s good advice, Jenson said.

“I always had a little bit of anxiety and anticipation when taking on something new. These are the experiences that keep you confident and make it possible to keep growing.”

Throughout her career, “the most defining moments have been the ones that presented personal and professional risk,” she said. “You’ve probably heard, ‘do something scary every day.’ I applied that to my career. Every time I took a step in my career, getting tapped on the shoulder or pursuing a role I was perhaps unqualified for, it was scary, but that’s where all the fruit was.”

In her 13 years at Norwest Bank, Jenson’s career was on a steady upward trajectory. On nights and weekends, she did college coursework and earned her Bachelor of Science degree in management and marketing from Minnesota State University, Mankato.

After distinguishing herself at Norwest, she was recruited by Piper Jaffray, also of Minneapolis, leading to 15 years with the firm. In 2006, its wealth management division was purchased by UBS, where she worked for an additional 11 years. In 2017, Kim brought her talents and leadership to Raymond James. Each of these transitions was a scary moment, she said, and each has proved to be worth it.

THE MANY TYPES OF HAPPINESS

Jenson remains “fundamentally excited about the business.”

“I’ve seen it over and over, the impact that we have – the impact we’ve made in the capital markets, the impact advisors make every day in the lives of their clients and families,” she said. “It’s what continues to drive me, the fact that we make a difference with our clients, for our people and our company, and in the communities where we live.”

While she is happy to share the benefits of a career in finance, she is adamantly nonprescriptive about her life, her career and her journey.

“Taking big risks and moving 10 times is not for everyone,” she said. “For me, it’s been energizing and additive, but that’s not the way everyone is going to create balance.

“As my husband, Tom, says, ‘There are many ways to have a good life. Choose one.’”

She notes that her father supported a family of five as an accordion player. Her mother, Helen, worked with developmentally challenged adults. Jenson’s son, Michael, is a successful owner of a small business that restores classic cars and builds hot rods and is the father to Jenson’s four grandchildren.

But she suspects that for many others – as it has been for her – a career in financial services can be a big part of their good lives.

“It’s a profession where we get to help people realize their hopes and dreams. Obviously, we need to use technical tools and knowledge to do that, but it’s a relationship business. For that, I think women, in particular, are so well-suited for this profession.”

It’s where, at least, she was able to provide for her family while finding fulfillment.

“If you ask me what I really love to do, I really love to weave high-impact opportunities together with people who care about the outcome and bring their skills and strengths to the table – and then celebrating our success together.

“That’s what I love to do, and it starts with the big picture in mind.”

Mentorship

The kindness of critique

The limits of kudos and the strength of honesty in mentorship

Kim Jenson is well aware of the impact mentorship can have on a career – it made all the difference in her own trajectory. She also knows that a good mentor is much more than a cheerleader. “The hardest words to say as a mentor can be the most important,” she said. Validation is part of the mentoring relationship, but constructive criticism from a place of respect and care can help a protégée break through the internal blocks holding her back.

“I’ve been very fortunate to be in a position to be a mentor more times than I can count,” Jenson said. “I enjoy mentorship so much – I enjoy the learning that occurs going both ways. To be a meaningful mentor, you have to listen well, but you also have to be transparent and honest.”

At its best, mentoring is an active role: The duty of a mentor isn’t only to bestow one’s protégée with sage advice when asked but to help her discover her goals and equip her with resources to pursue them. This takes a real investment of time. For financial advisors, this may seem like a familiar playbook – successful mentoring is similar to the work that goes into making client relationships strong.

Mentorship has great potential to be a multifaceted relationship. In its “Mentorship Basics,” the National Center for Women & Information Technology in partnership with the Anita Borg Institute for Women in Technology states that a mentor may fulfill all or a combination of these roles:

- **Advocate** – Provides her protégée exposure within the organization
- **Resource gatherer** – Seeks out learning and experiential opportunities that may benefit her protégée
- **Role model** – Offers candid insight into her own success and leads by example
- **Advisor** – Gives advice regarding performance and offers institutional and professional wisdom
- **Coach** – Guides her protégée in learning new skills or acting in a new role
- **Protector** – Helps her protégée avoid the things, like taking a wrong career move or getting bogged down in an assignment with no exit plan, that might derail her on the route to her goals
- **Supporter** – Listens well, provides organizational context, acknowledges disappointments and celebrates successes

The advisor role can lead to the most difficult moments, Jenson said.

“It’s much easier to give positive feedback, but it doesn’t help if that’s all they get,” she said. “It makes a difference when you can provide insight about their obstacles, things that may not be working well and possible derailers.

“Think how valuable it is when someone who cares about you – who you trust and respect – provides guidance that can sting a little but can unleash your success. It’s worth it. It’s worth the discomfort for both of us, I have found.”

A disciplined approach to mentoring can mitigate the discomfort. Drs. Vineet Chopra and Sanjay Saint, writing from their perspectives in academic medicine for the Harvard Business Review, said it’s important to “run a tight ship.”

Set expectations, set boundaries, build a regular cadence of communication with your protégée and make sure you can get behind her goals, they wrote. If you find it difficult to believe in her mission, you may not be the right mentor. It’s better to acknowledge that up front.

Jenson concurred – you can’t go into it halfheartedly.

“The best mentoring relationships are where both parties learn from each other,” Jenson said, “but as a mentor, you have to be in it, you have to be on task for the mentee. Some people believe we can keep people engaged by adding money and titles, which only go so far. To be a great mentor, you have to want to see that person grow. You have to want to see them fly, to achieve their own objectives and dreams.

“You really have to care.”

A group approach



Mentorship doesn’t have to be a one-on-one relationship. Considering time constraints, economic specialization and the itinerant nature of the modern professional workforce, it can be beneficial to the mentored and to the organization that a protégée be supported by multiple viewpoints. Many companies now host networking circles to help meet this need, including groups for women and young professionals.



A mentor's *boon*

Mentorship takes time, and in some cases will take sacrifice when a star member of the team makes her next step.

That's why it's important to recognize the benefits of their efforts, wrote the National Center for Women & Information Technology and the Anita Borg Institute for Women in Technology. While the organizations are focused on women in tech, their advice is pertinent for addressing challenges across the economy.

Among the benefits:

- Mentors increase their own visibility across the organization and develop new, cross-departmental relationships.
- Protégées are most commonly younger or less experienced than their mentors, giving the mentor insight into the world of the next generation of leaders.
- By reflecting on her own journey, a mentor might better focus on her goals and next steps.

- Mentoring improves employee retention, preserving institutional memory and helping the organization get stronger. Mentors should note their involvement in their performance reviews.
- Mentoring helps you further develop interpersonal skills, making you a more effective leader, listener and contributor.

“The regards are worth the investment,” the mentorship advocacy groups wrote. “Contrary to popular belief, mentoring does not require a disproportionate investment.”

If being an advocate-resource gatherer-role model-advisor-coach-protector-supporter seems like a few facets too many, you can tailor the experience to your commitment level. Even further, you can still be a mentor by being open and available in a more informal manner, taking questions and providing guidance on an ad hoc basis. 🗣️

Sources: National Center for Women & Informational Technology and the Anita Borg Institute for Women in Technology; Harvard Business Review; forbes.com

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Revamp your social media profiles with purpose

These tips will have you building your brand and meaningful connections.

Although we've been living in a mostly virtual world for a while now, your online presence might be overdue for a refresh. Most importantly, it should be authentically you and align with the brand you live in real life – the one you want to share with the world.

Sarah Blakely, founder and owner of Spanx, is a great example. If you scroll through her LinkedIn feed, you quickly get who she is and what she's all about. From vacation pictures with her kids and throwbacks to when she first started Spanx to girl power tributes and #MondayMotivation posts, she's unapologetically herself.

While attracting the kind of following Sarah has may not be your goal, some simple tips can help you freshen up your social media presence and stand out from the crowd.

Know your audience. If you want to successfully build meaningful connections via social media, the most important consideration is to identify who you're trying to reach. If you're trying to build a rapport with centers of influence or looking to hire new team members, LinkedIn might be where you should focus. However, if you're hoping to showcase your community involvement or highlight the culture of your office for clients, you might put more energy into Facebook. Be where your target audience spends time.

Engagement is key. It's not just about posting on your own accounts. Reply to comments on your posts to add value and repost industry information you feel passionate about. If you think about having genuine conversation online in the same way you engage in real life, you'll get noticed. It can't be a checkbox exercise because real, genuine dialogue builds true relationships.

A picture says a thousand words. Users are moving away from the ultra-polished headshot on LinkedIn – you know the one, stuffy suit and a stark white background – to a more approachable and authentic version. You still want to ensure

the quality is good and you're the only one featured, but an image that provides a glimpse into your personality (think genuine and candid) will speak volumes.

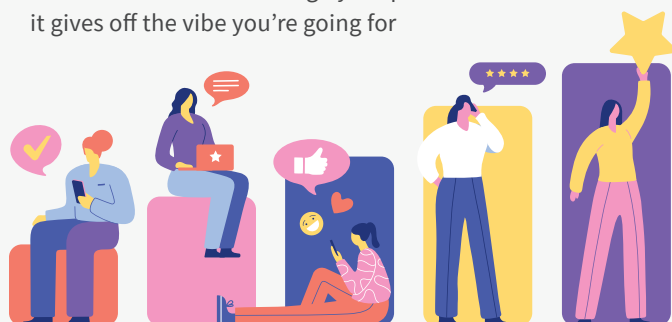
The most important aspect of revisiting any of your social media profiles is making sure they represent you accurately. After all, they set the tone for a future relationship you may build with your online connections. Thinking of your social media as an extension of yourself in real life will help you consider if it's authentically you.

Pro tip: LinkedIn has a cover story option that allows you to explain who you are and what you do in a 30-second video clip. The option is only available on the app right now, but it allows your connections to get to know you better than words on your bio will. It provides the opportunity to be personable and engaging.

NEXT STEPS

As you look to update your social media profiles ...

- Start by evaluating what your feed portrays and asking yourself if it aligns with who you are today
- Stay up to date on new social media features so you can test them as they're launched
- Ask a friend to scroll through your profile to ensure it gives off the vibe you're going for



Life
beyond the
*comfort
zone*

After a personal loss opened her eyes to the value of financial planning, **Melissa Keung, WMS, MBA**, set out for a career with impact. One well beyond her comfort zone.

Before the age of 16, Keung had never considered a career in finance.

Then she lost her dad.

“Through that, I met our family financial advisor,” she told Aspire. “I saw firsthand how important an advisor can be, not only in retirement planning and maximizing your balance sheet but also in a time of tragedy.”

Despite recognizing the value of advising, Keung, like many women, didn’t see that career path as part of her plans and instead opted for a degree in public health.

However, “I realized I didn’t have the stomach for the medical field or an interest in infectious diseases after I graduated. So, I pursued my MBA at the University of South Florida (USF) while working as the university’s international alumni officer.

“I was contemplating whether to continue down the path of fundraising or start a new career in finance when one of my professors said, ‘You should really consider financial advising.’”

A career in finance was the perfect opportunity to draw from her experience with her family advisor and to harness her entrepreneurial spirit.

Keung describes it as a full-circle moment.

While in her MBA program at USF, Keung was spurred by another professor to enter a stock-pitch competition, which was judged by equity research directors from Raymond James. She formed a two-person team with another female student, making them the only women competing.

“That was really outside of my comfort zone – I had just learned what alpha and beta were,” Keung said. “But I did it anyway.”

Her risk paid off. She and her teammate placed second out of eight teams.

The experience reinforced what Keung considers the overarching theme of her career: to continuously push herself outside of the comfort zone. It also marked her introduction to Raymond James.

“Raymond James kept coming up whenever I talked to advisors. Not only because of the culture, but because as an advisor, this is one of the best firms to be at.”

She had been eyeing the firm’s Advisor Mastery Program (AMP) for at least a year when she saw a LinkedIn post discussing a new offering called the Wealth Management Associate Program.

The latter focused on financial planning and client-discovery skills. It allowed candidates to work with successful, high-profile

advisory teams and learn about their work firsthand while also playing a role in helping them integrate planning software and other technology into their practices.

“The Wealth Management Associate Program was a perfect opportunity to get acquainted with Raymond James. Plus, it was a two-year program, which provided a longer runway for me to figure out what I like and don’t like – because there are so many different ways to be successful as an advisor.”

THROUGH THE LENS OF EXPLORATION

Keung officially joined Raymond James in January 2020 as part of the Wealth Management Associate Program. By March, COVID-19 had transformed the world.

Suddenly part of a fully remote program, Keung spent the next few months immersing herself in the field of finance while working with 13 advisors across three different branches. She applied her training to help them with everything from Zoom etiquette to financial planning best practices. She also found creative ways to expand her leadership among colleagues.

“Raymond James kept coming up whenever I talked to advisors. Not only because of the culture, but because as an advisor, this is one of the best firms to be at.”

“I had ‘Minute with Melissa’ moments in our branch meetings. Whether advisors had technology or product-related questions, that was my opportunity to be front and center with the branch so they wouldn’t see me as an intern or someone in an administrative role, because that’s not what the Wealth Management Associate Program was about.”

In turn, Keung attended client meetings, refined her presentation skills and saw firsthand how advisors build client relationships.

The program allowed Keung to establish her own role and responsibilities within each branch, giving her a taste of the freedom most advisors enjoy when structuring their days. It also allowed her to contemplate the type of advisor she wanted to be.

(continued on next page)

“If you jump into the business and you’re trying to build from day one, it can be very easy to have tunnel vision because your compensation depends on it,” she said.

“Next thing you know, you have a book of business that isn’t reflective of who you are or the type of advisor you want to be. Instead, the program gave me a lens of exploration and time to figure out what I wanted.”

SAVORING THE CHALLENGE

Armed with the lessons she learned in her training program, Keung continued her financial advising journey by accepting a financial advisor role with one of the teams she was working with – Executive Consulting of Raymond James in St. Petersburg, Florida – in May 2021.

She also joined the program that first caught her eye years ago: AMP.

AMP, which has since incorporated the Wealth Management Associate Program into its own curriculum, focuses on developing the client-facing skills, habits and processes crucial to launching a successful advisory practice. Participants choose between a stand-alone track, where aspiring advisors work on their own to build a business, and the team track, where they aim to add value to established teams.

Staying true to her stance on the comfort zone, Keung has savored the challenge of AMP.

“Now I’m not just learning; I’m also developing relationships

with existing clients and seeing the work it takes to close really large prospects.”

While Keung was planning to go solo after completing the Wealth Management Associate Program, she believes being on a team has provided opportunities she wouldn’t have had otherwise. These have ranged from getting exposure to ultra-high-net-worth clients – a rare feat for emerging advisors – to practicing various pitches with her team and receiving real-time feedback.

“I sometimes pursue the path of most resistance,” Keung admitted.

“Sometimes that’s helpful because I learn and grow a lot. But sometimes there’s a smarter way to go about things. While I had every intention to go solo, I quickly realized that joining the right team would expedite my growth and development as a financial advisor, which has proved true.”

SHIFTING PARADIGMS

As Keung has shown, meaningful growth requires flexibility. Shifting paradigms isn’t just wise – it’s inevitable.

So when Keung realized the expectations she had set for her personal life didn’t align with her professional plans, she pivoted.

“I got married in November 2019, right before I joined Raymond James. And I saw myself being this wife who cooked my husband dinners and was, not necessarily a housewife, but just more present.

“I quickly had to shift that expectation of myself. I started asking my husband to do more things around the house because I either had a client call or a networking event or exams to study for.

“Thankfully, my husband’s amazing, and we have a true partnership. But for me personally, it was a difficult shift in the expectations I had for myself.”

Keung’s struggle is well-known to working women around the globe.



“There’s an expression that says to fail fast. If you’re early in your career, this is the time to make the most of your growth and development.”

Still, Keung, who hopes to one day become a mom, counts family among her top priorities. That was one of the reasons she joined her current team, which mostly consists of dads and embraces a “family first” mentality.

WHERE TRUE GROWTH HAPPENS

When it comes to cultivating a successful career, Keung remains a staunch advocate of abandoning your comfort zone.

That ambitious courage is what emboldened her to walk away from the medical field when she realized it wasn’t right for her. It’s what inspired her to enter the USF stock-pitch competition despite her fear of failing, and it’s what eventually led her to AMP.

It’s what drives her to seek out challenges that fuel her motivation and broaden her horizons.

“There’s an expression that says to fail fast,” she said. “If you’re early in your career, this is the time to make the most of your growth and development.

“Even if you feel like you’re not ready, or you feel that you’re unqualified, just push yourself outside of your comfort zone and keep doing the things that scare you – because that’s where true growth happens.” 🌱



The start of a *rewarding* career

The next generation of financial advisors will be an inspiring reflection of the world around us – ready to offer the distinct perspectives that are vital to the future of our profession.

The Raymond James Advisor Mastery Program (AMP) seeks to enroll talented candidates from diverse backgrounds to provide them with a solid foundation and a long-range vision for a rewarding career. AMP’s two-year curriculum focuses on the interpersonal skills to meaningfully connect with clients and the acumen to strategically grow your business. That broader, entrepreneurial focus makes AMP different.

THE AMP APPROACH

- Interactive learning and mentoring
- Client relationships and communication
- Strategies for starting and growing a practice

To learn more, visit
raymondjames.com/advisor-opportunities.





The *fight* against breast cancer

How Susan G. Komen and its CEO **Paula Schneider** are working to battle the disease on all fronts.



In the U.S. alone, it's estimated there will be 287,850 new cases of invasive breast cancer and 43,250 breast cancer deaths in 2022. Chances are, you know someone who has been affected by the disease.

And everyone is at risk. The biggest risk factors are being born female (although men can also get the disease) and getting older (the median age at diagnosis for women in the U.S. is 63).

We sat down with Paula Schneider, CEO of Susan G. Komen, to understand how we can get involved in supporting the fight against breast cancer and why it means so much to her.

WALK THE WALK

"There're many, many ways you can get involved – and get involved with Komen specifically," Paula told us. "There's always the opportunity to participate in runs and walks, and we have about 60 of them throughout the country. And if you're not in an area that has runs and walks, we've created virtual options."

Komen is known for its walks and peer-to-peer fundraising, but they also offer corporate partnerships, legacy gifts and other ways to raise money, like fraternity fundraisers, sports challenges and requests for donations in lieu birthday gifts. Komen supporters have learned to get creative to help fund

“ This is so much more important than just me. This is about my girls, my girls’ daughters and everyone else’s daughters.”

the groundbreaking research and patient care resources the organization provides.

For Paula, it's personal. About 15 years ago, she was diagnosed with breast cancer. "I'm a breast cancer survivor," she said. "My mom died of breast cancer. My husband carries the BRCA gene mutation. We have two daughters. Enough said."

She was at a point in her career, after decades running leading fashion brands, where she was seeking more meaning from her daily work. When the opportunity to join the Komen organization came knocking, she knew it was the perfect fit. Paula moved across the country – from Los Angeles to Texas – and got to work. That was five years ago, and there's no stopping her.

"It's been the best opportunity, the best job in the world for me," she said. "This is so much more important than just me. This is about my girls, my girls' daughters and everyone else's daughters."

By the numbers



BREAST CANCER'S INFLUENCE

1 in 8 U.S. women will develop invasive breast cancer in her lifetime

287,850 new cases of invasive breast cancer are estimated in 2022

43,250 breast cancer deaths are estimated in 2022

63 is the median age of diagnosis for women in the U.S.

4% of breast cancers occur in women younger than 40



SUSAN G. KOMEN'S IMPACT

More than **\$1 billion** invested in breast cancer research since 1982

220,000+ patients have received financial assistance and support

100,000 advocates have mobilized to support patient rights

60+ annual fundraising runs and walks

260+ active research grants



Paula with her two daughters

GET INVOLVED

Komen takes a 360-degree approach to battling breast cancer – from funding and driving research to providing care for those with the disease. A big part of the mission is to take action and unify communities, including effecting policy change to remove barriers to access to care for patients and offering support to family members and caregivers of those with breast cancer.

“Komen has had fingerprints on almost every major breakthrough in cancer research that has happened over the past 40 years,” Paula said. “We’ve invested more than \$1 billion in breast cancer research since our founding; we’re second only to the U.S. government.”

Patient care services are just as important. When Paula was diagnosed, her patient navigator was her saving grace. She remembers saying, “I have no idea what I’m in for.” And while she can’t recall the names of all the doctors she came across, she certainly remembers Susan’s.

“Our navigators and patient care services provide direct support to anyone in the United States and includes financial assistance through our helpline if you can’t afford treatment,” Paula said.

This is now Paula’s life’s work.

“For me, the exit strategy is being able to close-up shop – there’s a cure and nobody has to worry about this again,” she said.

And she encourages you to get involved too. She recognizes not everyone has the opportunity to make philanthropy their main vocation but encourages everyone to incorporate it into what they do in some manner.

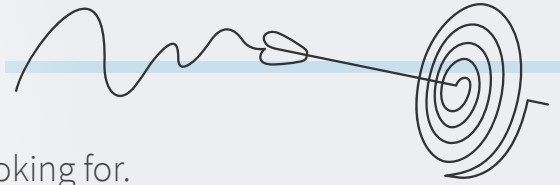
“You can make an impact in so many different ways, whether it’s in an organized way, like joining and participating with Komen or anything you care about – just do something for the greater good. I think it’s an obligation to step up and try to help. You have so much power, and you should use your power for good,” she said. “Because that’s going to have a ripple effect and make your life much more enriched. Mine has been in spades.” 🍀

Reminder: Get your mammogram

During the early stages of the pandemic, there was a drastic drop in breast cancer screenings and mammograms. This led to fewer early-stage and more late-stage breast cancer diagnoses in 2020 than in 2019, according to a recently published research study. “For all of you ladies out there who are reading this right now who did not get your mammogram because of COVID-19 or whatever you put it off for, now’s the time to go get your mammograms. At the end of the day, that is what will save your life. You will have much better outcomes if you have early detection,” Paula said. “Go do it!”

Source: [komen.org/breast-cancer/facts-statistics/breast-cancer-statistics/](https://www.komen.org/breast-cancer/facts-statistics/breast-cancer-statistics/); [breastcancer.org/facts-statistics](https://www.breastcancer.org/facts-statistics)

A *nudge* in the right direction



Nudge Theory could be the change agent you've been looking for.

If change is inevitable, and the only constant thing in life, why does it tend to be so difficult to manage?

From healthy habits to finances to relationships, it's tough to alter our behavior for the better. And to make it stick.

Over time, there's been growing interest in the idea of an incremental approach change and, more recently, interesting progress in the area of subtly being led toward better decisions and habits. In 2008, economist Richard Thaler's book, "Nudge: Improving Decisions About Health, Wealth and Happiness," introduced "Nudge Theory," a method for helping people make wiser decisions and exercise better self-control. He and co-author Cass Sunstein developed much of this theory based on the 1970s work of Israeli-American psychologists Daniel Kahneman and Amos Tversky, which centered on heuristics (mental shortcuts that can facilitate problem solving and probability judgments).

Thaler proposed nudges as valuable due to the fundamentally irrational ways humans can behave – ways explored by social psychologist Kahneman, who established that our brains operate on two different systems of thought. The first system provides the automatic reflex responses that prompt us to move quickly if something is heading toward us. The second system, slower and more rational, controls our conscious thought processes.

Recognizing the first system often overrides the second is the basic foundation of Nudge Theory, which brought Thaler the 2017 Nobel Prize for economics and helped cement him and Kahneman among the fathers of behavioral finance.

BREAKING IT DOWN

Nudge Theory comes down to presenting small, practical stimuli – or nudges – as little guides toward decisions that will benefit you in the long term. All without direct instruction, enforcement or punishment.

Nudges are tiny steps to get brains and behaviors moving in the right direction.

For instance, if putting a portion of your monthly salary into retirement savings has been hard to do consistently, you could try setting up systematic contributions through payroll. This nudge could also inspire you to create a habit of increasing those contributions every time you get a raise or a bonus. The work will be done for you, and the financial boost will be automatic.

Sources: bbc.com; businessballs.com; cnn.com; jamesclear.com; peoplemanagement.co.uk; santander.com; thedecisionlab.com

Or let's say you want to get more exercise and lose weight, but ice cream is calling your name. A nudge in the right direction might be allowing yourself the treat, so long as you walk to get it. You can also nudge your family to be healthier. One idea is to organize your pantry with the smarter snacks up front, making them convenient to grab.

When it comes to relationships, the thought of reconnecting with someone you haven't talked to in a long time can feel overwhelming, with so much to share and likely hear about. A simple "Just thinking of you" text can give both you and your friend the helpful nudge you need.

HABIT STACKING

Once you've nudged yourself toward something, consider trying another simple method for instilling positive change, known as habit stacking. According to James Clear, author of "Atomic Habits," the best way to build a new habit is to identify a current one and then stack another behavior on top. It works because your current habit is already built into your brain. By linking a new habit to an existing pattern, you are more likely to stick with your new behavior.

STAYING AWARE

When it comes to Nudge Theory, keep in mind others might be nudging you on occasion. This could be perfectly harmless and likely helpful. But we are talking about influence, which means marketers could have a whole bank of nudges waiting to be released. One example is a monetary reward for picking up your food from a restaurant instead of having them deliver it. So, it's good to consider whether incoming nudges are for your benefit or the greater good, rather than someone else's potential advantage.

As for habit stacking, the coast should be clear with nothing but more positive change on the horizon.

STACK 'EM UP

Can gradual, manageable habit stacking beat the ever-popular, all-at-once New Year's resolution? You could try a pattern like this and see for yourself. The trick is to wait until your current behavior becomes habit before stacking the next one.

SWITCH: The moment you take off your work shoes, put on your workout clothes.

GO: Head to the gym and spend at least five minutes inside with or without exercising.

DO: Complete one exercise of your choosing (a few sets on a weight machine, 20 minutes of cardio, etc.).

ADD: Mix in at least one more exercise before returning home.

CONTINUE: And so on, and so on, until your new routine is in place and part of your lifestyle.

Top questions to regularly revisit with your clients



It's officially fall. And with year-end fast approaching, now could be the perfect time for a financial check-in.

Using this time to assess your clients' current situation and recalibrate as needed can help keep them on top of their game. To identify small tweaks to their financial plans that could pay dividends, consider asking these simple questions:

Q "Can you increase your retirement savings?"

Most annual raises occur between January and April. If your client is anticipating an increase, suggest allocating some to their HSA, 401(k) or IRA.

Q "Has your home's value increased?"

Housing prices are predicted to rise another 10% on average this year, so it's a good idea for clients to revisit their homeowner's insurance and determine if they have enough coverage. Some premiums have risen to account for inflation, so encourage them to shop their policy for the best price too.

Q "Have you adopted a new pet this year?"

If any clients have added furry friends to their households, chat with them about adding their new pets to their estate plans. While we might consider pets family, some states consider them property. Adding a pet clause to a client's will makes certain their wishes are honored.

Q "How are you trending with taxes?"

While it's best to check in midyear to see how your clients' income is trending, now it also a good time to estimate what marginal tax bracket they'll land in. This can help them determine if they should put off income that could push them into a higher tax bracket.

Q "Do you have the travel bug?"

There's no better time to consider holiday travel than now, before the chaos of the holidays is in full swing. Encourage clients to set price alerts for date ranges and destinations they're eyeing, so they can book confidently when the time comes. Vacation mode on!

Q "Are your children headed to college?"

If any client's children are heading off to college soon, help them create a budget and discuss financial expectations, particularly around use of credit. This will help emphasize the value of your holistic service, build a foundation for financial literacy and open up lines of communication for future conversations.

Sources: cnbc.com; reuters.com; ez-probate.com





Backed by the strength of Raymond James

Your success is the foundation of our own. That is something we have always recognized at Raymond James.

In fact, it's been one of our guiding principles since the firm's founding in 1962. It's why we value the contributions of all advisors, and it's why we've developed resources like the Raymond James Women Financial Advisors Network.

1994

Inaugural Women's Symposium held in Marco Island, Florida.

Raymond James Network for Women Advisors makes official debut.

1996

Raymond James appoints first woman branch manager.

2003

Firm establishes the Woman of Distinction Award.

2004

Network launches first coaching program.

2005

Women's Advisory Council welcomes advisors from Raymond James Financial Services.

2007

Women's Advisory Council welcomes its first Canadian member.

2013

Network launches Registered Associate Mentoring Program (RAMP).

Raymond James Limited in Canada launches its own Network for Women Advisors.

2017

Network launches *Aspire*, the first magazine for women advisors in the industry.

2018

Network continuously strives to enhance resources and champion women advisors.

2019

The Women's Advisory Council welcomes its first member from London with the addition of Raymond James Investment Services.

The Women's Symposium celebrates

25 years

2020

We kicked off our three-day virtual conference with a record number of over 1,480 registrants, 750-plus women advisors from the U.S., Canada and the U.K., and more than 40 prospective women advisors – all who tuned in through live and on-demand sessions.

2022

AND BEYOND

For more information, visit WOMENADVISORS.COM.

The network is just one example of the dedicated support we extend to advisors like you. By offering regular educational and networking opportunities and providing exceptional resources to help you serve your clients and build your practice, the Women Financial Advisors Network responds to your specific needs.



redefine what it means to
SUCCEED

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Since 1994, the Raymond James Women Financial Advisors Network has dedicated time and resources to the growth, development and success of women financial advisors like you. From educational tools to developmental workshops and networking events, we offer women advisors the opportunity to establish and strengthen their connections to learn and grow – together. **To learn more, visit [womenadvisors.com](https://www.womenadvisors.com) or call 888.906.6323.**

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