



Agenda

- Women in the global wealth transition
- Challenges inheritors face
- Why you are here
- Our experience
- W³ - what it is all about
- Q&A

The BIG Picture

- Women currently hold **40%** of the Global Wealth
- By 2030 - **\$59 trillion** will be passed on from baby boomers.
- Women will inherit **70 %** of the Great Wealth Transfer.
- Women will possess **two-thirds** of the United States wealth by 2030.



The BIG Picture



And yet the state of global female leadership is still inadequate:

- 7.4% of female CEOs in Fortune 500
- 10% of female Leaders of Countries
- Female Board Members
 - 22% (USA)
 - 6% (Mexico)





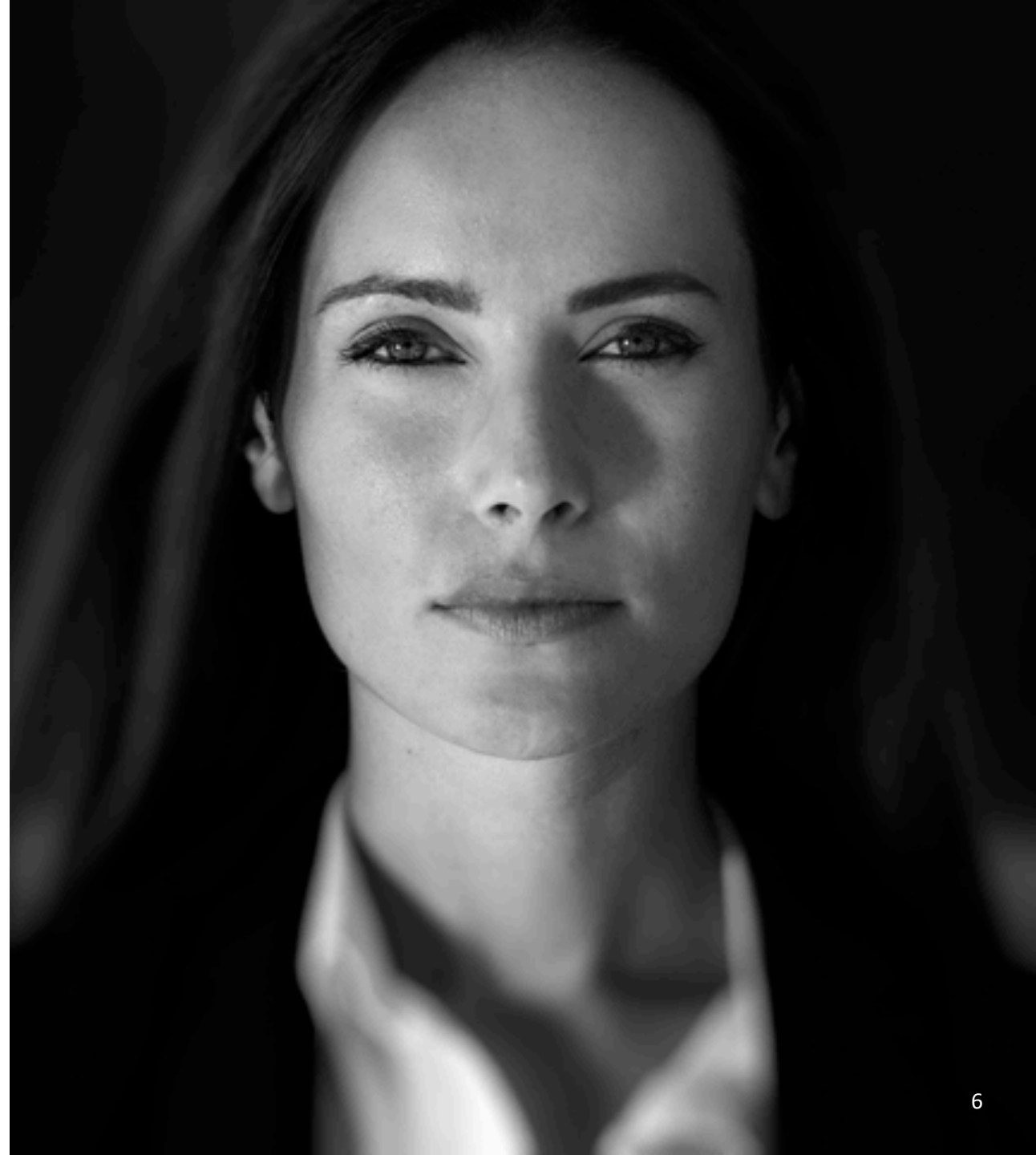
“ Women belong in all places where decisions are being made.

”

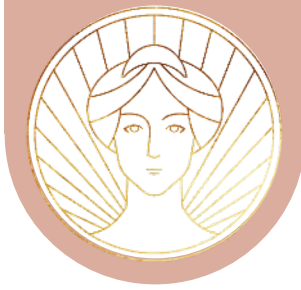
–Ruth Bader Ginsburg

Our proposition: The World Wide Women Council

Finding the courage and confidence to step into your power will change you, your family business and maybe the world.



Possible behavior towards wealth: **Consumers**



Investment: Little or none

Focus: Internal

Timing: Present

Impact: None

Motivation: Expectations

Perspective: Entitled

Population share: Most common

Transcendence
(Something larger
than yourself)

Consumers
(most common)

Investment
(Time, talent and resources)



Possible behavior toward wealth: Dreamers



Investment: Incapable or not willing to invest

Focus: External

Timing: Future

Impact: Small

Motivation: Meaning

Perspective: Enriching

Population share: Less common

Transcendence
(Something larger than yourself)

Dreamers
(less common)

Investment
(Time, talent and resources)



Possible behavior toward wealth: **Owners**



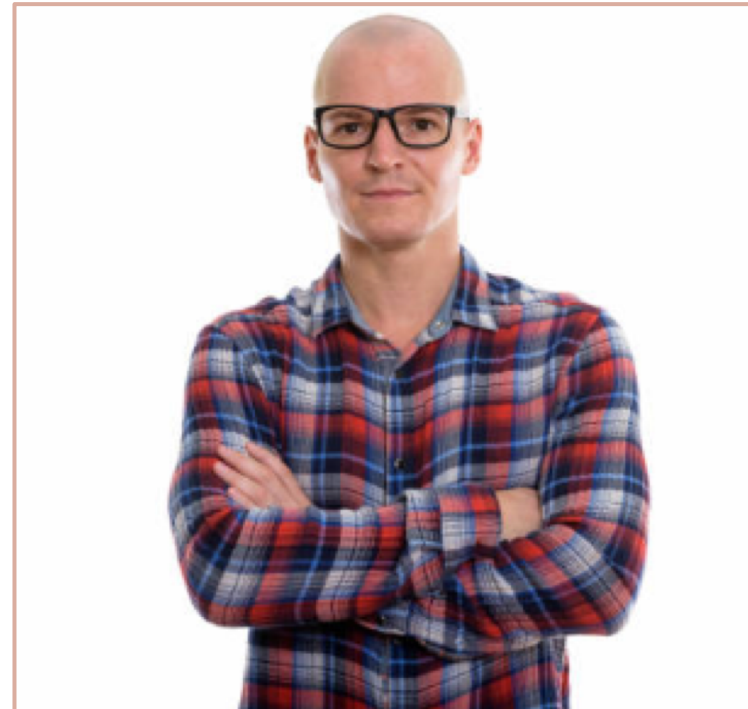
Investment: Committed
Focus: Internal
Timing: Present
Impact: Significant but short term

Motivation: Financial Returns
Perspective: Entrepreneurial
Population share: Less common

Transcendence
(Something larger than yourself)

Owners
(less common)

Investment
(Time, talent and resources)



Possible behavior toward wealth: **Guardians**



Investment: Committed
Focus: External
Timing: Present and future
Impact: Profound and long lasting

Motivation: Purpose
Perspective: Have received someone else's trust
Population share: Rare

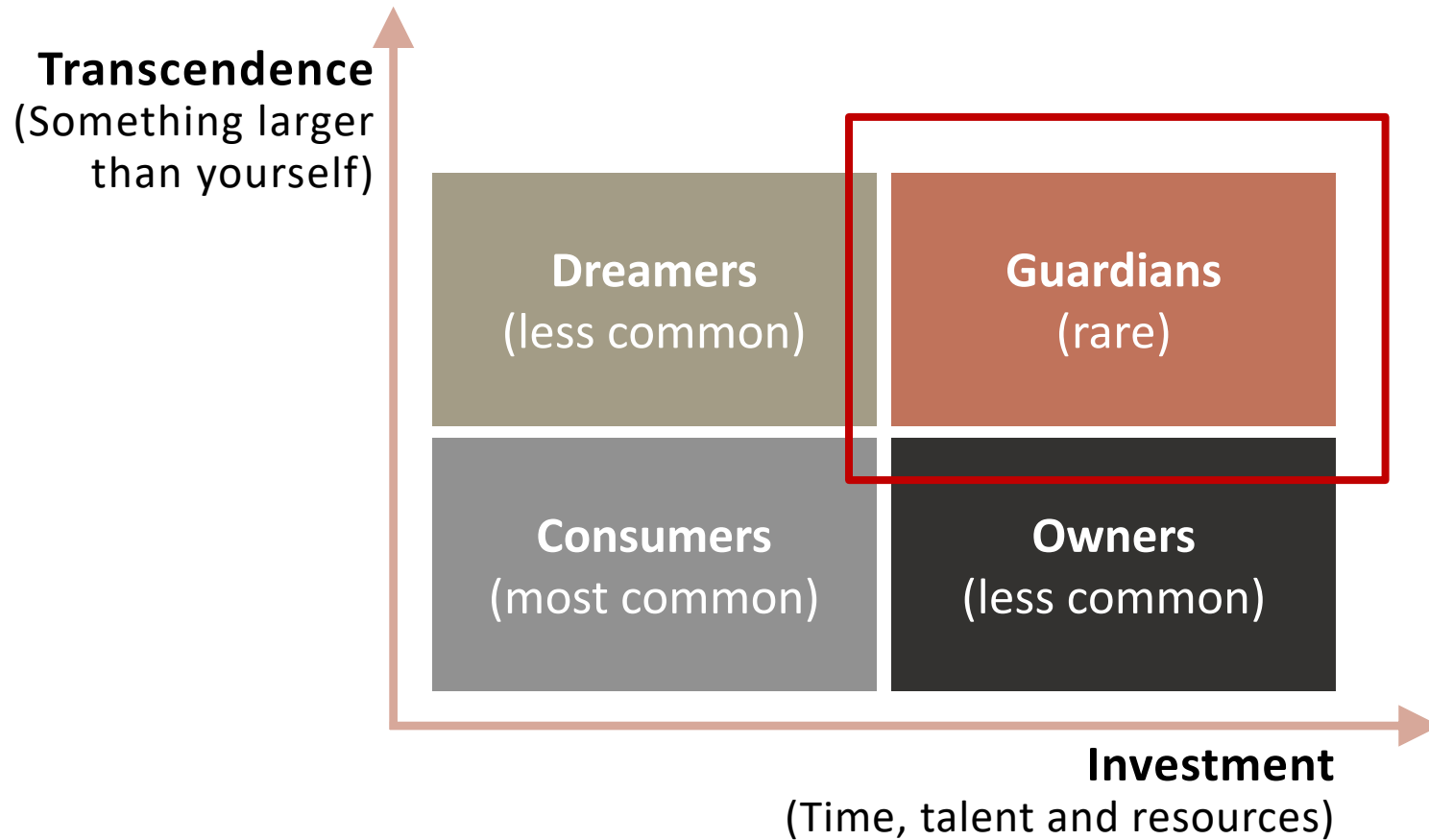
Transcendence
(Something larger than yourself)

Guardians
(rare)

Investment
(Time, talent and resources)

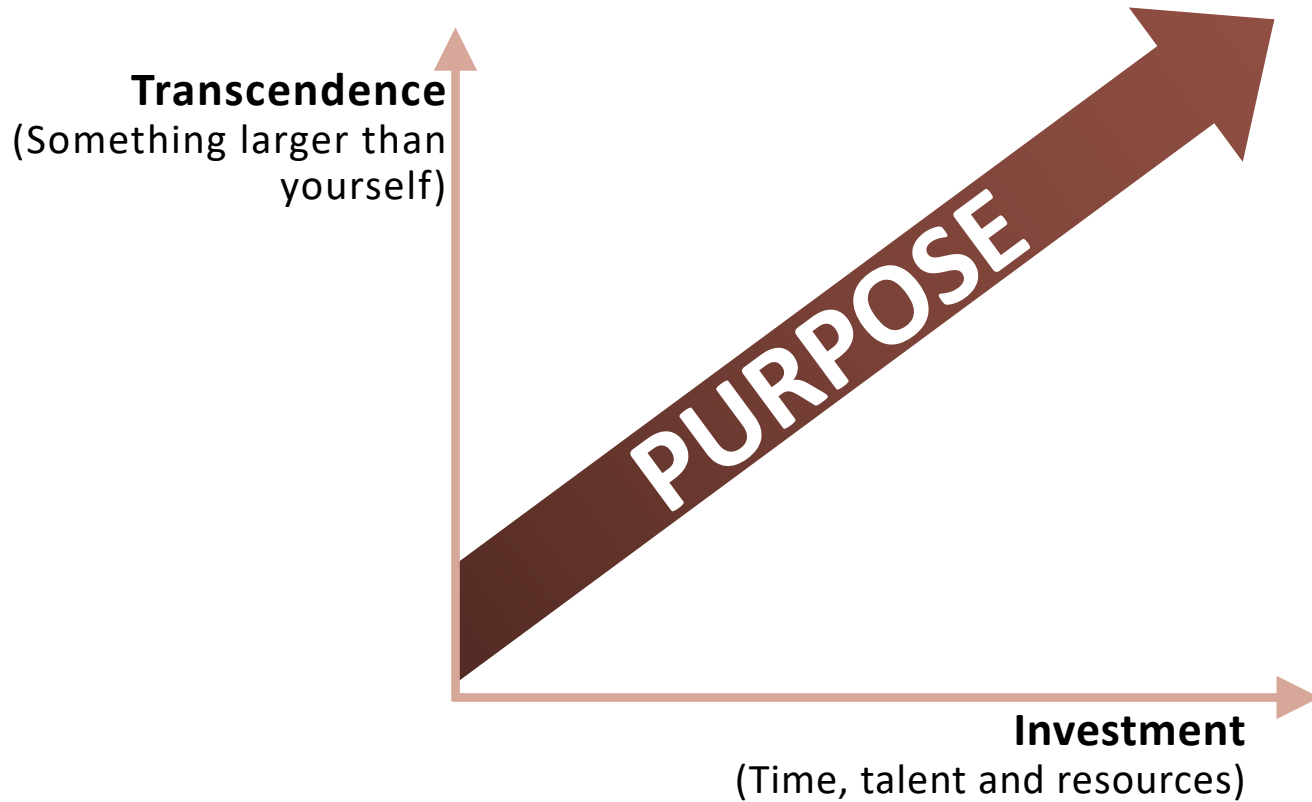


The four possible behavior towards wealth



The world needs responsible heirs with the will, purpose, and determination to contribute.

The “Why” of the Guardians



“ The heart of human excellence often begins to beat when you discover a pursuit that absorbs you, frees you, challenges you, or gives you a sense of meaning, joy, or passion.

”
– Terry Orlick



The Challenges

With wealth comes
privilege,
responsibility, and
sometimes fear.

You may have felt:

- Isolated by the **family's silence** around wealth
- Unsure about how to make the best decisions for **your children**, without money getting in the way
- Worried about how to **leave an impact** personally, when the family's presence looms so large



And what you want is to:

- Design the **legacy** you want to leave
- Have a **voice** and an **impact**
- Find a diversity of resources, ideas and a community of **people who get you**
- Elevate your conversations regarding family wealth

But you don't know where to turn.

- You've tried family office and financial institution roundtables, and other forums but there's **no meaningful connection**.
- You're missing the family and feminine component.
- You're ready for **real talk** but haven't found a place to open up and find trusted connections, but also **deep personal relationships**.



Who here feels this on a deep level?



There's a high cost:

- To **your soul** if you don't do what you're called to do
- To the amount of **connection** you can have if you can't talk about the problems and challenges you feel most deeply
- For the **future generations** if they can't hear your voice
- For the **female employees** that are not represented

A little bit about us

Michelle Langdon
Ella Chase Hyland
Veronica Yepez Reyna
Ann marie Houghtailing



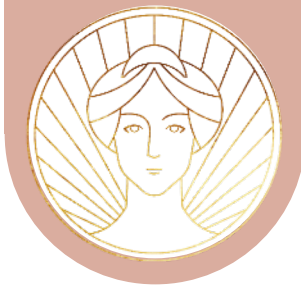


About The W³

The World Wide Women Council

*We believe there is a
version of you that you
haven't met.*

The World Wide Women Council



A community that allows you to reach your true potential and create meaningful impact.

These are YOUR people

- Peer to peer guidance
- A global perspective
- Community, accountability, support
- Experience deep belonging
- Crowdsourced feedback & resources
- Share your wins and challenges
- Online community



Our Conversations

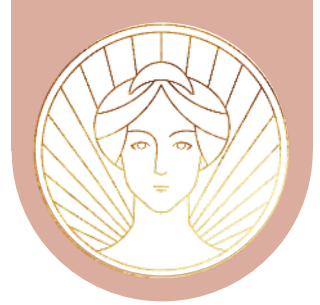
- Raising purpose driven children
- Navigating family dynamics
- Self-advocacy
- Creating an action plan for agency
- Stepping into leadership
- Unequal wealth
- Purpose and contribution



Our Experience



Testimonials



“ *There is nothing more powerful than a network of women invested in lifting other women.*

*Women allow one other to be their **authentic selves**.*

We speak hard truths, but with compassion. ”



Testimonials



Women who have the courage to make positive changes in their lives.

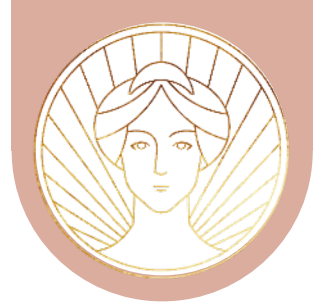
Tools to uncover my blind spots and overcome obstacles to personal and professional growth.

Many of my own obstacles were old family dynamics that I unconsciously felt a loyalty to.

***The courage to follow my own path** and the tools to deal with my fears and limitations, while remaining a loving and committed member of my family.*



Testimonials



“ The Council has given me **increased confidence** in my decision making, my value, advocating for my value, presenting and advocating for my ideas, and increased confidence in my ability.

”

Testimonials

“

*We are very often **too close to our own issues to see them clearly**, and this extraordinary women's peer advisory group is so helpful not only in solving problems, but in identifying the underlying issues we didn't even realize existed.*

”



The W3 Format

- A two and a half-hour monthly virtual meeting + 30 min virtual happy hour
- No more than 10 women
- 2 facilitators per session
- By invitation only
- Virtual community
- One on one support
- Reading materials and resources

Investment

- Intro fee \$650/month (6-month commitment)
- \$950 after January 2021 (new members)



Kick-off date:

Nov 18, 2020



You were born to your family and wealth
for a higher reason.

You are a force.

**Who are you going to help to take a seat at
the table?**



COME AND JOIN US.

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