



AWD

Association for Wholesaling Diversity

The Association for Wholesaling Diversity (AWD)

2023 7th Annual National Assembly | June 21-23 | Swissôtel Chicago

(Black Women Wholesaler Retreat | Executive Leadership Workshop | Conference | Career Fair)

Members and employers, the AWD Annual National Assembly has been held each summer since our February 2016 inception (except 2020, due to COVID). As a refresher, AWD members are defined as all black professionals in wholesaling, key accounts, or advanced planning roles at financial services firms. AWD members span all firms, regions, channels, and financial services lines of business, including asset management, insurance, DCIO, annuities, alternatives, etc. As a 501(c)(3) non-profit, AWD adheres to its mission, which consists of 4 elements: building and strengthening the **community** of members, improving and **developing** our members' wholesaling craft, helping our members **advance** their careers, and **recruiting** more black talent into the financial services wholesaling career path.

The AWD Annual National Assembly aligns with these four elements. **Community:** In gathering all black wholesalers from across the continent and across the industry, once per year, AWD hosts the only professional event dedicated to the craft of wholesaling, where the plurality or totality of attendees, speakers, leaders and voices are black. This unique event has resulted in myriad, concrete mental health benefits for member attendees—as reported by members and their employers. Thanks in part to 'code-switching' being turned off, no fear of judgement for being black, no racist microaggressions, and enthusiastic encouragement to be unapologetically black & unapologetically excellent at one's craft for 3 full days, the AWD Annual National Assembly is an event employers should be actively encouraging their black wholesaling employees to attend. Knowing you are a part of a community that supports you, unquestioningly, improves employee retention at firms and within the industry.

Development: The entirety of each Annual National Assembly agenda consists exclusively of programming designed to improve members' wholesaling craft. All content is necessarily product neutral and firm neutral. For three days, members connect with far flung mentors and mentees, build and strengthen their professional networks, and demonstrate & sharpen their wholesaling skills. This laser focus on development delivers myriad, concrete professional benefits. Each annual assembly to date has resulted in multiple members earning promotions they directly attribute to

their time at assembly. **Advancement:** Helping members develop their craft clearly and directly aids in career advancement. Creating and nurturing a true 'safe space' community for members also aids in career advancement due in part to members' increased confidence, broader network, ready access to a broad array of complimentary resources, and heightened retention. Advancement is also aided by our stated and intentional focus on it. AWD encourages, motivates and inspires its members, always but especially during our national assembly. Better financial and career outcomes are always the result.

Recruiting: AWD hosts a Job Fair / Career Expo on the final day of each year's national assembly, which attracts students and job seekers who engage with AWD sponsor employers in attendance. Members also interact with job seekers and students during the fair. For black career fair attendees, the visual abundance of black professionals enables job seekers to visualize themselves being successful as a financial services wholesaler. It is critical for any job seeker to be able to see themselves succeeding in the role. Black job seekers often have difficulty visualizing their success in settings where they are rarer than in the general populace.

The business case for AWD members attending conference, and employers approving and encouraging their AWD member employees' attendance, cannot be overstated. Corporate employee resource groups do not focus on one career path exclusively, and rarely provide exclusive settings with an abundance of only black professionals. As ambassadors of their firm, AWD Members are driven to 'show up and show out,' by demonstrating their acumen, improving their skills, and helping others improve their skills. There is no better 'commercial' for a firm than their exceptional black wholesalers demonstrating, improving, and sharing their excellence. AWD asks all financial services firms employing AWD Members (all black wholesaling, key accounts, or advanced planning professionals) to approve their AWD members' time out-of-the-office as non-PTO and cover their conference-related travel expenses (including transportation and lodging) the same way they would at any other financial services industry conference. Unlike most conferences, upon their return to the office, AWD Members are often encouraged to share with management and others what they learned, other ways they benefitted, and who they met at conference. AWD and our members welcome this. Please use what you glean from that sharing as a basis to partner or continue partnering with us going forward.

Thank you!

Marlōn Hall, Founder, AWD