



Women in Finance®

# VOLUNTEER HANDBOOK



Together, advancing  
women in finance.



A guide for our volunteers  
and committee members

July 2026

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# Welcome

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Thank you for volunteering for 100 Women in Finance (100WF). We appreciate your commitment to advance our mission to help women achieve their professional potential at every career stage.

Volunteers are the cornerstone of 100WF's global community since its founding in 2001. While volunteering is a commitment and requires an investment of time and effort, it is also incredibly rewarding and helps volunteers expand their network – including developing lifelong friendships – increase their professional visibility, and build important skills that translate to career success.

This handbook sets out policies and guidelines to help you succeed in your 100WF volunteer role. Please review this information carefully, as all volunteers are expected to adhere to these guidelines as updated from time to time.

The policies and guidelines set out in this handbook apply to ALL 100WF volunteers. Additional policies and guidelines may apply based on a volunteer's particular role, committee or the initiative with which they are involved.

If you have any questions, please refer to your main 100WF staff contact or regional director:

**Americas:** [carolina@100women.org](mailto:carolina@100women.org)

**APAC:** [maria.blanca@100women.org](mailto:maria.blanca@100women.org)

**EMEA:** [zara@100women.org](mailto:zara@100women.org)

*As part of developing this handbook, we invited feedback from our volunteers on the draft as well as the volunteer experience more broadly. We are grateful to everyone who took the time to share their comments, suggestions, and insights. All feedback was carefully considered and helped shape the final handbook.*

**Please confirm that you have reviewed and agree to abide by the Handbook**

# 100WF Code of Professional Conduct

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The 100 Women in Finance Code of Professional Conduct (**Code**) is fundamental to the values of 100 Women in Finance (**100WF**) and essential to achieving the organization's mission to strengthen the global finance industry by empowering women to achieve their professional potential by promoting the highest standards of ethics, education, and professional excellence.

100WF is committed to maintaining a productive, civil, and respectful environment where members are expected to exhibit the highest levels of courtesy and respect at all times toward speakers, moderators, vendors, staff, volunteers, other members, and guests.

All members must abide by the Code at sponsored or co-sponsored events, any opportunities that arise from or relate to such events, or during any interaction with any member of 100WF (whether in person or online) anywhere in the world. Violations may result in disciplinary sanctions by 100WF, which may include revocation of membership.

In order to effectively carry out 100WF's mission, it is essential that the organization fosters an inclusive and welcoming environment, free from verbal, written, or physical harassment of any kind. As a condition of membership, all members are required to accept and abide by the Code.

## Expected Behavior

- Embrace the diversity of perspectives across different business, geographic, cultural, age, gender, and ethnic backgrounds.
- Observe discretion and confidentiality with the contact details of any person met through 100WF.
- Communicate professionally with every person as if you are interacting with a Chief Executive.
- Avoid personal attacks directed toward any individual and instead discuss ideas.
- Be mindful of your surroundings, other event participants/attendees, and venue or contracted support staff.
- Respect the rules and policies of venues associated with a 100WF event.
- Refrain from sharing the subject matter of any conversation, non-100WF content, or “off the record” comments unless you receive prior consent from the applicable person.
- Utilize meetings, events, and networking opportunities for bona fide business opportunities related to the financial sector.
- Disclose any conflicts of interest upon discovery when interacting with any member.

## Unacceptable Behavior

- Any action that reflects adversely on 100WF or other members by their association with you.
- Harassment in any form, including bullying, threatening, stalking, intimidation, or disparaging comments that are hurtful or negatively interfere with any other person's experience with 100WF at any time.
- Sexual harassment, including but not limited to unwanted or inappropriate conduct, comments, jokes, or advances.
- Violence, threats of violence, or violent language directed against another person or group of people.
- Possession of a weapon or any item that can be used as a weapon, which may be used to threaten or cause injury to others if used in a certain manner at any 100WF event.
- Discriminatory jokes and language based on age, sexual orientation, race/ethnicity, gender identity, religion/creed, national origin, or political views.
- Inappropriate photography or recording, including within the event environment for use on social media, without prior permission of the individuals or owners of the content therein.
- Solicitation of members for any purposes (including selling products or services, fundraising, charitable, or political causes) without prior consent.
- Failure to obey any rules or regulations of the event venue, including destruction or vandalism of personal or event property and materials.
- Boisterous, lewd, or offensive behavior or language.
- Consuming alcoholic beverages or other substances in an irresponsible manner.
- Falsely reporting violations of this Code and/or retaliating against another person for reporting a violation of this Code.

Members should bring any concerns related to conduct by any member of 100WF to the attention of their main staff contact in the first instance, and then, if required, to 100WF's CEO or COO, or the Global Board.

All reported concerns will be treated seriously and investigated. All members are expected to cooperate fully and honestly with any investigation. The significance of a violation and any consequences therein may vary based on the circumstances that are determined through the 100WF's investigative process.

A member may be dropped or suspended from membership or barred from attending future events for any conduct that is prejudicial to the best interests, reputation, and proper functioning of 100WF. 100WF, its staff, and volunteers also reserve the right to require a member to leave a meeting or event for behavior contrary to the Code.

# 1 Definitions

- **100WF:** 100 Women in Finance.
- **100WF staff:** an employee or consultant of 100WF and where in this handbook something is referred to 100WF staff it means the volunteer's primary staff contact.
- **chair:** the chair, co-chair, vice-chair or co-vice chair of a 100WF committee or PAG.
- **committee:** a formal group of volunteers designated as a committee by 100WF; includes Global Committees.
- **committee member:** a volunteer serving on a 100WF committee.
- **EMS:** 100WF's Event Management System.
- **Global Committee:** a committee relating to a 100WF global initiative including FundWomen, 100WFinTech, LaunchMe, Impact Investing Symposium and any other committee established by 100WF as a global committee from time to time.
- **member:** a registered member of 100WF who is current with their access fee.
- **PAGs or Peer Advisory Groups:** intimate, senior level peer groups of members working in the same specialized areas, e.g., ESG. PAG guidelines are set out in Appendix 2
- **Peer Engagement:** initiatives designed to connect members in specified segments of 100WF's membership including Early Career, Mid-Career, and Senior Practitioner members and PAGs.
- **subscriber:** An individual who has registered to receive communications from 100 Women in Finance and is included in the 100WF database,
- **volunteer:** a member who volunteers for 100WF as a committee member or in some other way.

## 2 About 100 Women in Finance

- a) 100WF is a global **501(c)(6)** membership association based in the US with an affiliated **501(c)(3)** foundation. Both organizations are tax-exempt, but only the 501(c)(3) receives charitable (tax-deductible) donations. Membership access fees paid to the 100WF Association are not tax-deductible.
- b) **100WF's structure comprises:**
  - Board of Directors.
  - Global Council.
  - Staff team, made up of employees and consultants.
  - Volunteers, serving on committees or otherwise volunteering for 100WF.
- c) 100WF's volunteers serve on committees or councils, not boards, and 100WF operates in over 30 locations globally. Locations are not branches or chapters.

## 3 100WF Volunteers and Committees

### 3.1 Overview

- a) Volunteers advance the mission of 100WF and enable delivery of its programming and initiatives.
- b) Volunteers serve on committees, chair PAGs or otherwise facilitate 100WF's programs for example by supporting an initiative in an advisory capacity.
- c) 100WF committees are either **global** or **location** specific. Global Committees are not linked to a specific location and include the 100WFinTech, LaunchMe and FundWomen Committees.
- d) Where a location has a single committee, it is usually called the Location Committee (e.g., "South Africa Committee").
- e) Where a location has multiple committees, the committee organizing events for all members is called the Education committee (e.g., "London Education committee") or the Location committee (e.g., "Australia committee"). Other committees are named according to their role, e.g. "London Early Career committee".
- f) Committees are led by chairs/co-chairs and may have vice chairs/co-vice chairs. PAGs are led by chairs/co-chairs. Co-chairs are encouraged.
- g) No committee holds a position of seniority or authority over another committee.
- h) A committee may only be established with the prior consent of 100WF's CEO or COO.
- i) If there is any inconsistency between the specific guidelines for a committee and this handbook, those specific guidelines will take precedence.

### 3.1 Active participation and benefits of volunteering

- a) Volunteering requires commitment and an investment of time and effort. Active participation is essential to be fair to other volunteers who all give their personal time, and for successful outcomes.
- b) In return, volunteers gain valuable benefits including increased professional visibility, personal growth, expanded network, and meaningful connections and friendships.
- c) Current 100WF volunteers whose access fee is paid may use 100WF in their signature footer if they wish, subject to the following:
  - Individuals are responsible for getting any compliance approval including from their firms.
  - If used, it must be in the stipulated format (see paragraph (d) below).
  - Adding the 100WF logo is optional.
  - Including the links is optional but encouraged.
- d) Stipulated form:

**Kellan E Brown**  
**100WF Volunteer**[, Vice Chair]\* – Location Education Committee\*\*  
[100women.org](https://100women.org)  
+ logo (if desired)  
\*include any chair role (chair, co chair, vice chair) or omit  
\*\* Link to Location page of website
- e) Current 100WF volunteers whose access fee is paid may reference 100WF in their personal social media profile and use the 100WF logo provided it is clear that they are volunteers and not 100WF staff or 100WF board members. On LinkedIn 100WF volunteering should be listed in the Volunteer section and not in the Experience section (see section 10.5).

### 3.3 Requirements for volunteers

Each volunteer must:

- a) **Be a paid member.**
- b) **Adhere to all 100WF's policies and guidelines** including this handbook and the 100WF Code of Professional Conduct.
- c) **Actively participate in assigned volunteer roles and, if on a committee:**
  - Attend at least 80% of committee meetings which are scheduled in advance and notify the chair in advance if unable to attend.
  - Contribute to discussions, including on initiatives, programs, events, sponsors, speakers, and topics.
  - Complete assigned tasks in a timely manner.
  - Attend most local and virtual events organized by their committee and all events for which they are primarily responsible.
  - Respond promptly to all committee communications requiring a reply.
  - For location specific committees, live and/or work in the committee's geographic location, unless otherwise agreed with the chair and 100WF.
- d) **Promote 100WF** by:
  - encouraging non-members and event speakers to join as paid members,
  - supporting member retention and renewal, and
  - introducing 100WF to potential speakers, members and sponsors to extend the reach of the organization and deepen its relationships.
- e) **Use 100WF systems** including:
  - for all events, EMS (event management system) or such other systems as determined by 100WF.
  - 100WF's Google Shared Drive for collaboration and maintaining an up to date event pipeline. Volunteers should be able to access this drive and provide a gmail address for this purpose.

- f) **Commit to a minimum of two years** of active participation and where a committee organizes events, lead on at least one event and support a second event each year.
- g) **Complete a self-review annually** when requested by the committee chair or 100WF. Reviews typically take place at the end of each year but chairs may select a different time.
- h) Chairs and committee members must be within the membership group being served by that committee or PAG.

### 3.4 Additional requirements for chair/co-chair

- a) **Actively manage** the committee to encourage engagement, participation and contribution to the committee's goals
- b) **Coordinate and lead regular committee meetings** (scheduled in advance), and ensure that committee meeting notes, including attendance records, are taken at all committee meetings and promptly emailed to 100WF staff.
- c) If the committee organizes events, **oversee the event pipeline**, maintain a 6-12 month advance calendar and ensure coverage and fair assignment of responsibilities for events to individual committee members.
- d) Review and manage committee composition, adding or removing members in consultation with the committee and 100WF, and ensuring that the committee member terms are staggered to ensure continuity.
- e) Conduct an annual self-review with committee members, using the 100WF provided template.
- f) Provide regular updates on committee activities and committee membership to 100WF staff.

- g) Annually review and plan for leadership succession, including appointing vice-chairs in consultation with the committee and 100WF. A 3–6 month transition is recommended.
- h) Identify a suitable replacement for their role at all times.
- i) Attend quarterly or other regular regional chair calls (global, regional, or local), or designate a representative if unavailable.
- j) Liaise regularly with 100WF staff for updates, guidance and support.
- k) Promote an inclusive interactive committee culture. Lead by example.
- l) The provisions in 3.4 do not apply to the committees for FundWomen, Impact Investing Symposium, 100WFinTech, LaunchMe, PAGs and Global Council to the extent that their own specific guidelines provide otherwise.

### **3.5 Multiple committees, location and roles**

- a) A volunteer may serve on more than one committee concurrently.
- b) A volunteer may not serve on the 100WF global board and a committee concurrently.
- c) A volunteer may hold a leadership position (e.g. chair) on only one committee or Global Committee at a time. This restriction does not apply to Impact Investing Symposium and FundWomen.
- d) A volunteer holding a leadership position in a location specific committee must be based in that location.

## 4 Education/Location/Peer Engagement Committees, PAGs and Global Committees

### 4.1 Objectives and programming guidelines

- a) Deliver engaging high quality programming in their location featuring finance industry or professional skills content. Events should showcase diverse perspectives, raise visibility, and foster meaningful networking.
- b) **Promote 100WF** by:
  - encouraging non-members and event speakers to join as paid members,
  - supporting member retention and renewal, and
  - introducing 100WF to potential speakers, members and sponsors to extend the reach of the organization and deepen its relationships.
- c) The objectives of the Global Committees are defined in their respective Global Committee guidelines. If there is any inconsistency between the Global Committee guidelines and this handbook, the Global Committee guidelines will usually take precedence.

### 4.2 Key principles

- a) Education events are organized by education/location committees and are open to ALL paid members, regardless of role, seniority or firm.

- b) **Peer Engagement events are** organized by Early Career, Mid Career and Senior Practitioner committees and by PAGs and are designed to build community within the peer group. These events are for all paid members at the relevant career stage for Early Career, Mid Career or Senior Practitioner, and for all paid members in a relevant role for PAG events:

- Early Career: up to 10 years of industry experience.
- Mid Career: 11–20 years of industry experience.
- Senior Practitioners: 20+ years of industry experience.
- PAG events: open to members of the relevant PAG by application.

Noting that the boundaries of these groups can be fluid, invitations for Mid Career events are typically sent to subscribers with 5 to 20 years of experience and invitations for senior practitioner events are typically sent to subscribers with more than 15 years of experience.

- c) **Other programs.** After consulting with 100WF staff, committees may develop specific programs for all or part of the membership, such as student site visits, and local mentoring initiatives.
- d) Events organized by Global Committees and Peer Engagement events are open to members within the relevant group in accordance with their scope and mandate.
- e) In locations with only one committee, the committee may also organize Peer Engagement events.
- f) Peer Engagement events can take the form of a meeting without formal speakers and typically have fewer participants than all member events.
- g) Events should be of a high quality including in terms of content, speakers, and execution.
- h) If an event is proposed to take place within five days of a 100WF Gala in any location, and the speakers are such that 100WF leadership should attend the event, the organizer should flag this to 100WF staff before submitting the event for approval or confirming the event.

### 4.3 Programing expectations (except Peer Engagement and Global Committees)

- a) The number of events open to **all** members in each location should be in line with the size of the location determined by the number of members in that location. Smaller locations are expected to organize **at least four** such events each year, and larger locations are expected to organize **at least 10** such events each year.
- b) At least 75% of events organized by a committee should offer relevant finance or career focused content aligned to 100WF's mission.
- c) At least 75% of events organized by a committee should be in person or hybrid.
- d) Where possible, explore options for **supplementing education events with Peer Engagement activities**, e.g., post-event dinner or pre-event drinks with senior members, speakers, and committee and sponsor representatives.
- e) Aim to organize a speakers dinner annually as a best practice to build affiliation and grow membership.

### 4.4 Programing expectations – Peer Engagement and Global Committees

- a) Quality over quantity.
- b) Follow 100WF's general event policies and guidelines and the specific policies and guidelines applying to the relevant Global Committee or PAG. Programming expectations are specified in the PAG and Global Committee guidelines.

## 4.5 Event responsibilities for committees organizing events

Unless agreed otherwise with the chair in consultation with the committee, each committee member is expected to:

- a) Lead or co-lead at least one event each year, including:
  - secure sponsor, venue, speakers
  - manage invitations and RSVPs through EMS
  - coordinate event from concept to delivery to post event
  - manage all inquiries relating to the event
  - attend event and on site coordination
  - keep the committee updated and seek support as needed.
- b) Support at least one additional event each year as the designated back-up organizer.
- c) Support other events by:
  - suggesting event ideas and topics
  - volunteering for tasks relating to an event
  - attending and promoting the event
  - inviting potential members as guests (subject to capacity and 100WF's guest policy)
  - leveraging their personal professional network to help secure event sponsors/hosts, speakers and attendees.
- d) Collaborate with Global Committees and other location specific committees as needed.
- e) Invite speakers to become members of 100WF to promote ongoing engagement with 100WF.
- f) Follow 100WF's event policies and guidelines.
- g) Refer to 100WF staff for guidance if assistance is needed with securing a sponsor.

## **4.5 Additional requirements for Global Committees and Peer Engagement committees**

- a) If planning an all member event or to open a Peer Engagement/Global Committee organized event to all members, guidelines and policies relating to education and Peer Engagement events apply, and the chair or event organizer must consult with the relevant location/education committee chair and 100WF staff in advance. This is to avoid conflicts of date, speaker, or topic and to avoid adversely affecting attendance at either event.
- b) In the event of a conflict, 100WF staff and organising volunteers will collaborate to find the best solution. Typically the first event confirmed or formally held by 100WF staff in EMS takes precedence.
- c) If an event organised by a committee is likely to conflict with a flagship event organised by 100WF, 100WF staff will discuss options with the event organizer.

## 5 Committee composition and selection

### 5.1 Composition

- a) Education/location committees should reflect a broad cross-section of the finance industry in their location, including a diversity of roles, firms, and seniority levels to extend the reach of the committee, volunteer development and succession planning. No more than two committee members should be from the same firm.
- b) Global Committee and Peer Engagement committee composition is determined by the committee's specific mission and mandate.
- c) Committee members must have the skills, interest and commitment to fulfill assigned responsibilities (e.g. membership, events, outreach, etc.).
- d) Committee size can vary, but a group of 6 to 12 members including the chairs generally works well.
- e) Committees may assign roles to committee members, e.g. managing EMS, taking minutes, member outreach, managing the local LinkedIn group etc.

### 5.2 Joining a committee

- a) Selection of committee members is at the discretion of the chair in consultation with the committee and 100WF. Chairs should be transparent in their selection process and should communicate pathways for interested and qualified members to become involved and join their committees. Each committee should issue a general call for new volunteers at least once every two years via an email to all members in their location. Where members express an interest in volunteering for a committee, the chair should either refer the interested individual to the next general call for volunteers or meet with the candidate, depending on the committee's needs.

- b) The chair should keep a record of expressions of interest for volunteering for 100WF or joining the committee.
- c) As part of the application to serve on a committee, the applicant should submit a short bio and cover note indicating why they wish to serve on the committee, and the chair should provide the applicant with a role description and requirements.
- d) Prospective new committee members should meet with the chair initially to discuss their involvement.
- e) Any committee member and 100WF may suggest new committee members for consideration.
- f) For assistance with committee member recruitment, the chair should reach out to 100WF staff.
- g) All volunteers must be on-boarded by 100WF staff.

### **5.3 Term and succession**

- a) Except where a committee's specific terms provide otherwise, there is no term limit for committee members.
- b) Except where a committee's specific terms provide otherwise, chairs serve a two year term, typically renewable once for an additional two year term. If a chair has served or will have served for more than three years as at 31 July 2026, they may continue to serve as a chair for a further period of up to two years as agreed with 100WF to enable an orderly transition.
- c) When looking for a successor, chairs should consider existing committee members first and if proposing a non-committee member, must refer to 100WF staff in advance.

- d) Chairs are encouraged to review succession planning in collaboration with any co-chairs, vice chairs, and 100WF staff.
- e) Chairs should maintain a suitable replacement for their role at all times and provide details to 100WF staff.
- f) After stepping down from a chair role, the chair may continue as a committee member.
- g) After stepping down from a chair role or committee, a volunteer may, if mutually agreed with the committee and 100WF, continue to support the committee in an informal capacity.
- h) 100WF may ask a chair or co chair to step down from their chair role to create leadership opportunities for other committee members.

## **5.4 Stepping down**

- a) If a chair or committee member wishes to step down or is unable to fulfill their responsibilities, they should notify the chair or, in the case of the chair, 100WF staff, as soon as possible. They should aim to give at least two months advance notice.
- b) A chair or committee member must step down if they fail to meet committee/chair requirements and are asked to do so by the chair (in consultation with 100WF staff), or directly by 100WF staff.
- c) 100WF may, at its discretion, remove any chair or committee member.
- d) All documents and materials relating to 100WF should be stored on 100WF's shared drive. When stepping down, a committee member or chair should hand over all 100WF documents and materials to 100WF staff in the case of the chair or to the chair in the case of a committee member and should confirm that all documents and materials are in the shared drive. Documents and materials include event proposals, sponsor and speaker contact information, committee calendar and event pipeline.

## **5.6 Committee review and reporting**

- a) 100WF reviews all committees quarterly. Data on membership and event numbers is provided to the 100WF global board to assess committee effectiveness and performance.
- b) The chair should regularly report to 100WF staff on successes and areas for improvement including with respect to event quality, committee operations and committee member contributions.
- c) Chairs are encouraged to share their successes and areas for improvement with other chairs and volunteers on scheduled chairs calls and at volunteer town halls.

## **5.6 Volunteer communications and relationships**

- a) 100WF group emails (e.g. `committeename@100women.org`) include relevant volunteers and 100WF staff and should be used for 100WF matters including organising 100WF events and sharing ideas.
- b) 100WF group emails should not be listed on the public 100WF website or in broad distribution emails to avoid issues with spam and scam emails.
- c) Volunteer communications may also take place on additional technology platforms such as the Qooper Mentorship Platform and informal whatsapp groups (see section 8.3).
- d) Volunteers may have access to other volunteers' and subscribers' personal contact information. This information must not be shared outside 100WF and must only be used for 100WF purposes. Volunteers with access to EMS and other 100WF systems must verify their understanding of and compliance with this requirement.
- e) All communications between volunteers, members, subscribers and 100WF staff must be respectful, relevant, and efficient.

## 6 100WF events organized/led by volunteers

*(excluding Impact Investing Symposium, Global FundWomen Week and galas)*

### 6.1 Content

- a) Events feature finance industry, professional skills or career focused content that members want to hear about from speakers they want to hear from. Events typically include a networking element. Provided the majority of events organised feature finance industry or career focused content, networking events without speakers or specific content which are designed to build a community and are anchored in 100WF's mission may be organised from time to time.
- b) PAG meetings and Peer Engagement and networking events do not have to have speakers.
- c) For topic ideas review past events on 100WF's website and/or refer to 100WF staff.

### 6.2 Event date

- a) Only one in-person or virtual event should be scheduled per day in the same location. Ideally, only one 100WF event should take place in a location during the same week.
- b) Where a global webinar is scheduled, in person events should not overlap with its timing.
- c) Only one global webinar should be scheduled per day.

- d) Where more than one event is proposed for the same date or week in a location or there is an overlap with a global webinar, the event approved first or formally held in EMS by 100WF staff will typically take precedence. However all organizers are encouraged to collaborate to review alternative dates. If no arrangement is possible, 100WF may require an event not to proceed.

### **6.3 Event size and audience, sponsor invitees**

- a) Events may be large or small depending on the 100WF location, venue capacity, topic and intended outcomes.
- b) The primary audience is 100WF members. Depending on venue capacity and event popularity, non-members (subject to 100WF's guest policy – see section 6.4) may attend. In new locations, a higher proportion of non-members may be present.
- c) A percentage of spaces at an event is allocated to the event sponsor/host for their invitees – typically 10– 15%. This may vary based on event capacity and topic. Event sponsors/hosts manage RSVPs for their assigned spots. Event sponsor/host guests do not have to be members and are not subject to 100WF's guest policy.
- d) Except for Peer Engagement events or by invite events, members cannot be excluded from an event on the basis of their role or career stage. Members cannot be excluded from an event based on their firm.

### **6.4 Guest policy**

- a) 100WF is a membership organization and 100WF programs are for paid members.

- b) Non-members may attend one event (subject to capacity and if a Peer Engagement event, the requirements of the cohort) to experience a 100WF program. To register for further events, they must be a paid member.
- c) If a non-member attempts to register for a second event, EMS will block the RSVP and will prompt them to become a paid member.
- d) In new locations, subscribers who have not yet paid the access fee may be allowed to attend events for a limited time before the guest policy is enforced. Committees should consult 100WF staff for guidance.

## 6.5 Speakers

- a) **Profile**
  - Speakers should be experts in their subject area, and offer content that is of genuine interest to 100WF members.
  - For panels or fireside chats, speakers must not be from the same firm. For a panel with at least three panellists and a moderator, one panellist and the moderator can be from the same firm. This provision does not apply to events organized by 100WF staff, the LaunchMe committees or events where the primary audience is students.
  - Except for single speaker events, the speaker line-up should include at least one woman. For single speaker events where the speaker is not a woman the introduction or moderation should be by a woman.
  - Speakers may not engage in product placement or present sales messages.
  - 100WF does not host speakers who are running for election or re-election to political office.

b) **Payment and gifts**

- Speakers participate on a pro bono basis, and are thanked at the event, and afterwards via email from the organising committee and 100WF's social media posts.
- 100WF does not pay speakers, reimburse expenses or provide gifts or entertainment (e.g. post event drinks). An event sponsor/host at their discretion may pay speaker fees and cover their travel and other expenses as part of their sponsorship.
- Volunteers may self-sponsor a gift to a speaker provided the gift does not exceed USD50 in value except where the gift is hospitality (e.g., meal, drinks, invitation to attend an event). Hospitality gifts may exceed USD50 provided the gift giver is present.
- Any questions or potential exceptions must be directed to 100WF staff and must be pre-approved in writing by 100WF's COO. Violations of the policy should be reported to 100WF staff.

c) **Speakers with commercial interests**

- Speaking at a 100WF event offers brand visibility and an indirect marketing opportunity. Speakers with commercial interests must be informed that product promotion and sales messaging are not permitted.
- 100WF does not give any minimum sales commitments or cover speaker expenses/fees.

## 6.6 Event and Invitation language

- a) Events are typically in English. However, committees may organize local events in their local language. Global virtual events are conducted in English only.
- b) Invitations are created using 100WF's templates and are written in US English.
- c) If a committee wants a dual language invitation, the committee may provide a translation of the final English text to include in the invitation alongwith the English text.

- d) **Invitations:**
- Include space for the event sponsor's logo, a link to the event sponsor's website and a brief description of the event sponsor,
  - List speakers alphabetically by last name and include their bios. The moderator is listed last,
  - Are sent to subscribers and members based on the data and selection in their 100WF profile, and
  - For in person education events, are first distributed to 100WF Global Angels.
- e) A flyer with a RSVP link can be provided to the event organizer on request to 100WF staff.

## 6.7 Event promotion

- a) 100WF distributes event invitations to the relevant mailing list by email.
- b) 100WF will typically promote sponsored events (other than pure networking events) on its main 100WF LinkedIn page before the event and at its discretion may post again after the event depending on the content schedule for 100WF's social media feed. By invite only events are only promoted after the event due to the restricted audience. Posting limits do not apply to 100WF conferences (e.g. Global FundWomen Week), or fundraising events (e.g. galas).
- c) Non-sponsored events and networking events may be promoted 100WF's LinkedIn at the discretion of 100WF
- d) Subject to any not for attribution and privacy considerations, volunteers may share event details on their own channels and their location's LinkedIn group page if there is one, before and after an event, and may use the event flyer produced by 100WF.

## 6.8 Event sponsor/host responsibilities

- a) Events are typically paid for by a financial services firm or service provider firm (e.g. law firm) referred to by 100WF as the event sponsor or event host. Some events are self-sponsored by members. There is no local or global 100WF budget for events.
- b) For an in-person event, the sponsorship is in kind and the event sponsor/host is expected to:
  - Provide a venue with suitable capacity for the location and the nature of the event along with any audio/visual equipment.
  - Offer light refreshments before and/or after the event.
  - Produce name badges for all attendees.
  - Provide registration table services and note no-shows/additional attendees (with support from the organising volunteers).
  - If agreed, provide video-recording and/or conferencing capabilities.
  - Provide screens where 100WF event slides can be displayed.
  - Contract with and pay any third party vendors directly.
  - If exceptionally agreed directly between the sponsor and any speakers, cover speaker speaking fees and travel expenses.
- c) For virtual events (e.g. webinars), the event sponsor/host must pay the current virtual event fee directly to 100WF. 100WF provides the Zoom platform and facilitates delivery of the virtual event.
- d) Event sponsorship benefits typically include:
  - Brand promotion to 100WF subscribers via the event invitation, website listing, at the event, and through 100WF's social media channels.
  - A speaking slot for the event sponsor/host or their nominated speaker.
  - Opportunity to collaborate on event content that showcases the event sponsor/host's expertise.
  - For recorded events, placement of an edited recording in the on-demand section of 100WF's website for viewing by members or publicly, as applicable.
  - Allocated event spaces for the event sponsor/host's clients and employees.

## 6.9 100WF events, not sponsor events

While 100WF events are paid for by firms in the finance industry, they are 100WF events, not event sponsor/host events. 100WF guidelines and policies must be observed, including the following.

- a) Invitations use 100WF's templates and 100WF retains editorial control over the invitation language.
- b) The event sponsor/host is featured as an event sponsor/host but the event is not co-branded or a joint event.
- c) Event sponsors/hosts are typically assigned at least two speaking roles (e.g. welcome and panelist or moderator). Event sponsors/hosts may suggest additional speakers (e.g. a client), but the final decision on content and speakers rests with 100WF.
- d) Sales pitches and product placement are not permitted.
- e) Speaker line-ups should include a variety of firms and at least one woman.
- f) Events must be open to all members, or all members within the relevant peer group. No member may be excluded based on their employer or role.
- g) The volunteer organizing the event or 100WF's CEO/CDO if attending the event will give introductory remarks and/or closing remarks.

## 6.10 Private events

- a) The default position is that 100WF events are private, off the record and not for attribution and the content may not be reported or published. This is to enable candid discussions and active participation by all.

- b) 100WF along with any event sponsors/hosts, speakers and participants may share that the event occurred on social media and other channels, but may not disclose content unless otherwise agreed.
- c) If all participants agree, an event may be recorded, reported on or held on the record. Depending on what is agreed, a recording may be posted to 100WF's public website (with or without a time limit), posted to the members-only section of the 100WF website (with or without a time limit) or not posted at all.
- d) If an event is being recorded, reported, or held on the record, this must be clearly stated at the start of the event.
- e) Photos and videos may be taken at events and shared by 100WF, the event sponsors/hosts, and speakers including on their platforms, by email or otherwise.

## 6.11 Special invitations

- a) A special invitation is an email sent to all or a segment of 100WF's membership regarding a non-100WF event.
- b) Special invitations must be approved by 100WF staff and may be considered if:
  - The request comes from a partner organization defined as one with which 100WF has an established reciprocal relationship or formalized collaboration.
  - The opportunity offers extraordinary value or broad interest to members and may be exclusive to 100WF.
  - The event does not conflict with a scheduled in person or virtual 100WF event in the same location or with a global virtual event
  - The frequency of requests from the external organization or in a 100WF location is deemed reasonable by 100WF staff.
  - The event is targeted at members in a new or small 100WF location.

- c) Special invitations are issued using 100WF's special invitation template, and registrations are managed by the organizing party, not 100WF. These invitations are not promoted on 100WF's website or social media platforms. Typically, no more than two special invitations may be sent in a location in any year.
- d) In addition, or where a special invitation is not possible, a member may share the event by posting details to 100WF Community or their location's 100WF LinkedIn group (if available).
- e) Special invitation events are not 100WF events and do not appear as events organized by 100WF or volunteers in any reporting.

## **6.12 No show fees (NSF)**

- a) If a committee wants to implement the NSF for some or all event types (e.g. education events), they should discuss this with 100WF staff and receive written approval.
- b) If the NSF applies in a location, it is the committee's responsibility to track no-shows, record them in EMS, and inform 100WF staff so that members can receive appropriate communication regarding the fee and payment instructions.
- c) Where the no show fee applies, the event invitation will specify the amount of the no show fee.

## **6.13 Event guidelines**

Appendix 1 sets out guidelines applying to 100WF events. The appendix may be shared with event sponsors/hosts.

# 7 Resources for Volunteers

## 7.1 Event Management System (EMS), Volunteer Resources and marketing materials

- a) EMS is 100WF's primary platform for managing 100WF's global calendar/event pipeline, creating invitations and collecting RSVPs. Except to the extent 100WF uses other platforms for specific programs or events, all volunteers organizing 100WF events must use EMS for ALL 100WF events. Where additional or alternative systems are used by 100WF, volunteers must use these platforms as required.
- b) Volunteers are trained to use EMS (and any other relevant systems) by 100WF staff, or an experienced volunteer.
- c) Contact 100WF staff for access, training, and support for EMS and any other relevant systems.
- d) Volunteers with EMS access can access "[Volunteer Resources](#)" (updated regularly) via their 100WF profile. These resources include:
  - Templates (e.g. sponsor/speaker outreach, reimbursement requests)
  - Marketing collateral
  - Committee tools and guides
- e) Volunteers must not create any custom marketing collateral for 100WF including slide decks, templates, event posters, roll-up banners, apparel etc. For additional needs, volunteers should reach out to 100WF staff in advance.

## 7.2 Local membership information

- a) Volunteers on an education, location, or Peer Engagement committee who are up to date with their access fee and have EMS access, can view member information for their location via their 100WF profile by clicking the Admin System button. A step-by-step guide is available in Volunteer Resources (see section 7.1(d)).
- b) The system allows volunteers to:
  - view location membership information and individual registered member records.
  - search by name, firm etc..
  - filter by role, organization type, years of experience, access fee payment status etc.
  - run and export reports.
- c) Due to data protection rules no contact information is included, however volunteers can use Community (see section 7.4) to connect directly with members.

## 7.3 Location/visibility initiative webpage

- a) Each location and visibility initiative has a dedicated page on 100WF's public website with local news, events and committee details. These pages may include event write ups, member profiles and other content. Select items may also appear on the website homepage at 100WF's discretion.
- b) Contact 100WF staff to submit content. The content will be reviewed and may be edited by 100WF staff. Final editorial control rests with 100WF.

## 7.4 Community

- a) Community is 100WF's private, online space for member-to-member communication and hosts 100WF recorded content. All paid members have access through their 100WF login.
- b) Members can post about external industry events or other initiatives, start or join discussions, or connect with other members globally. Community is searchable by name, organization, organization type, role, location and city.
- c) Volunteers are encouraged to use Community, as a complement to 100WF's official communications and to promote its use within their local membership.
- d) Community's Front Porch and member to member communications are not moderated, and users are expected to use good judgment and courtesy. Improper use should be reported to 100WF staff. Violations may result in restricted access.

## 7.5 Event flyer

- a) 100WF produces a flyer for each event open to all members and for some Peer Engagement events.
- b) Flyers are typically shared on 100WF's social media channels prior to the event and where there are screens at an event, the flyer should be used as the holding slide along with a "join 100WF" slide with a QR code.
- c) Volunteers are encouraged to share or repost flyers on their social media channels.
- d) A version of the flyer with an RSVP link can be provided to volunteers on request.

## 7.6 Additional marketing resources

- a) For access to additional resources, please contact 100WF staff.
- b) Resources may include:
  - Design templates for event slides
  - Pop-up banners (one per location)
  - Social media promotion of events, speakers, sponsors (subject to 100WF's social media guidelines)
  - Virtual event support

## 8 Communication

### 8.1 100WF global social media

- a) 100WF maintains official pages on several platforms, with LinkedIn being the most active and widely followed. All posts are managed by the 100WF Marketing team.
- b) 100WF's social media is used to:
  - Promote events, initiatives, and news
  - Share event photos and write-ups
  - Thank event sponsors
  - Celebrate milestones
  - Supplement email communications
  - Highlight staff members and members speaking at external conferences where there is an agreed media partnership
- c) Follow 100WF here:
  - [LinkedIn](#)
  - [Instagram](#)
- d) Volunteers are encouraged to:
  - Follow 100WF's official LinkedIn page as well as their local LinkedIn group (where available).
  - Repost and engage with 100WF content (likes, comments, shares).
  - Mention their 100WF volunteer role in their personal LinkedIn bios or posts (e.g. "Member, 100 Women Education Committee, Australia" or "Chair, 100 Women in Finance Early Career Committee, Cayman Islands").
  - Follow and engage with fellow members.
  - Post about 100WF events on personal LinkedIn, before or after events – even if 100WF has not posted and encourage event participants (e.g. speakers, event sponsors) to do the same.
- e) [View 100WF's Social Media Guidelines for Volunteers](#) for more information.

## **8.2 Local LinkedIn groups**

- a) Volunteers are not permitted to create 100WF pages or groups.
- b) On request, 100WF can set up a public location specific LinkedIn group for a location. A location specific LinkedIn group is intended for ALL committees in a location to promote events and foster connections. Committees must collaborate to keep the group active and relevant.
- c) Each committee's chair(s) or designated committee representative(s) are responsible for managing their LinkedIn group, including posting content, approving group member requests, and encouraging and managing discussions.
- d) Location groups are committee managed and lightly monitored by 100WF.

## **8.3 WhatsApp and messaging services**

- a) Volunteers may choose to communicate with each other via messaging platforms such as WhatsApp. These channels are not monitored by 100WF.
- b) It is good practice to obtain express permission before adding any member or volunteer to a WhatsApp (or equivalent) group.

## **8.4 Media and press**

- a) 100WF events are typically private, off the record and not for attribution.
- b) Press attendance at 100WF events is only permitted with prior consent from 100WF, the event sponsors/hosts and all speakers.

- c) Any editorial content written by a volunteer that mentions 100WF, regardless of whether it is intended for media publication, the 100WF website, or social media platforms, must be approved by 100WF before publication.
- d) All media inquiries and consent requests should be directed to [media@100women.org](mailto:media@100women.org) or to 100WF staff.

## 8.5 Speaking for 100WF

- a) Volunteers may speak about 100WF but only 100WF's CEO, CDO and COO may officially speak or make statements on behalf of 100WF, unless a written exception is granted by 100WF's CEO, CDO or COO.
- b) Volunteers and subscribers may speak to the media or post on social media in a personal capacity only, sharing their own involvement or experience with 100WF.

## 9 Fundraising and galas

### 9.1 Fundraising

- a) Fundraising supports 100WF's programs and initiatives worldwide and is subject to local regulations.
- b) Volunteers must receive 100WF approval before conducting any fundraising under the 100WF name.

### 9.2 Galas

- a) 100WF's annual galas are a major source of revenue and anyone may purchase a ticket/table subject to capacity. Members and volunteers are encouraged to support galas and other approved fundraisers.
- b) 100WF must approve fundraisers, galas and gala locations in advance. Current gala locations are Cayman Islands, Hong Kong, London and New York.
- c) Volunteers interested in organising a fundraiser or gala should contact 100WF staff in advance of any planning.

# 10 Budget, banking, legal and regulatory

## 10.1 Local budget

- a) Locations and committees do not have local budgets. All access fees, no-show fees, virtual event fees, and sponsorships go to 100WF's central operating budget, which is not allocated to specific locations.
- b) Programming must be funded locally through in-kind or direct event sponsorship from industry firms that wish to support 100WF.
- c) Volunteers typically cover minor personal expenses (e.g., travel, meals) related to their 100WF involvement.
- d) Out-of-pocket expenses requiring reimbursement must be approved in advance by 100WF. Unauthorized expenses may not be reimbursed. Approved expenses will be reimbursed on submission of a claim form and receipts.
- e) Locations may not apply for government grants or corporate sponsorships without prior approval from 100WF, as this could impact the U.S. 501(c)(3) nonprofit status of the 100 Women in Finance Foundation.

## 10.2 Local registration

- a) If volunteers believe that local laws or regulations require 100WF to register as a legal entity in their location, they must immediately inform 100WF staff. 100WF will consult legal counsel to determine next steps.

- b) No location may act independently to set up a legal entity or suggest to third parties that one is being established without express written approval from 100WF.
- c) 100WF operates “locations” and not “chapters” or “branches”.
- d) 100WF has a process for new locations which is robust and lengthy. For more information regarding new locations contact 100WF staff.

### 10.3 Contracts

Contracts must be signed by the CEO or COO. Volunteers may not sign contracts on behalf of 100WF.

### 10.4 Banking and payments

- a) Most 100WF locations **do not have local bank accounts** and typically do not need one, as event sponsors/hosts usually host events at their premises and pay vendors directly.
- b) For member paid activities (e.g. self-pay dinners), volunteers should contact 100WF staff in advance to see if it is possible to set up payment links or arrange direct payment of vendor bills. For vendor payments related to pre-approved expenses, an invoice addressed to 100WF must be sent to 100WF staff.
- c) Cash receipts are not provided.

## 10.5 Volunteer status

- a) Volunteers are not employees or contractors of 100WF and must not represent themselves as such.
- b) Volunteers serving on a committee are committee members.
- c) Committee members are encouraged to include their volunteer role with 100WF on their LinkedIn profiles. This helps recognize their contributions and enhances the visibility of 100WF's network. As an unpaid volunteer position, the role should be listed under the "Volunteering" rather than the "Experience" section.

## 10.6 Data protection and confidentiality

- a) 100WF does not share subscriber, guest or member contact information with event sponsors/hosts or third parties. Volunteers must not share this information either.
- b) Volunteers must use 100WF information and data, including subscriber information, only for 100WF activities. All such information must be kept confidential and not shared or used outside of authorized use. Volunteers must notify 100WF promptly upon discovery of any unauthorized use of the confidential information by any individual or entity. Volunteers are required to follow 100WF's confidentiality obligations as outlined in the EMS confidentiality agreement and other communications.
- c) View [100WF's Privacy Statement](#).

## 10.7 Usage of 100WF logo

Except with prior written permission from 100WF or as specified in sections 3.2(c) and 3.2(d), volunteers and subscribers may not use 100WF's logos on personal business cards, email signatures, websites, or social media including materials relating to speaking engagements.

## 10.8 Conflict of interests

- a) Volunteers must act solely in the interests of 100WF while performing their 100WF duties.
- b) Volunteers (acting individually or as a group) may not receive personal payments, financial credits, or explicit favor from event sponsors/hosts or any other parties for their work related to 100WF. This applies even if such benefits ultimately support members or subscribers. This policy extends to volunteers making introductions or referrals to 100WF on behalf of conference organizers, media outlets, vendors or other businesses
- c) Questions or reports about potential violations of this policy must be reported to 100WF staff.

## 10.9 Gifts

- a) Volunteers may not accept gifts over USD50 from event sponsors/hosts, vendors, or service providers related to their volunteer duties. Hospitality gifts over USD50 (e.g., meals, event invitations) may be accepted by volunteers if the gift-giver is present.
- b) Any questions or violations of this policy must be reported immediately to 100WF staff.

## 10.10 Non-discrimination

100WF is committed to equal membership and volunteer opportunity regardless of age, ancestry, disability, ethnicity, race, religious belief, sex, sexual orientation, gender identity, marital status, political belief, or veteran status.

## 10.11 Resolving conflicts

- a) At 100WF, positive intent is assumed. Difficulties with another volunteer, member, subscriber or staff should be addressed directly with the other person. If this is not possible, the volunteer should consult their committee chair or 100WF staff. For staff related issues, contact the COO (or the CEO if the issue involves the COO). For issues with the CEO, contact the Chair of 100WF's global board. For issues with an event sponsor/host, refer to 100WF staff.
- b) 100WF may remove a volunteer from their volunteering role if it considers this necessary and in the best interests of the relevant committee, location, initiative or the organization.
- c) If a volunteer steps down or is removed from a committee, they agree not to make negative or harmful comments about the committee, its members, or 100WF. This includes comments made in person, online, or on social media.

## 10.12 Code of professional conduct

Members and volunteers must periodically attest to 100WF's Code of Professional Conduct. This code is presented on joining 100WF or registering for an event and can be viewed in a member's 100WF profile.

## 11 Suggestions and complaints

100WF benefits from informed and thoughtful suggestions from our volunteers and feedback is essential to optimal operations. Depending on the nature of the suggestion, or complaint, reach out to the committee chair(s), and/or 100WF staff.

# Appendices

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## Appendix 1: 100 Women in Finance Events Guidelines

### Aim

Programs that engage 100WF members and feature **high quality insightful industry or career skills focused content**, provide diversity of thought/perspective, raise visibility, and create an opportunity for networking and making connections to advance 100WF's mission.

### Key features

- **Content**

- Finance industry or professional/career skills focused content that 100WF members ("member") want to hear about from speakers they want to hear from.
- Networking focused events designed to build community and that are anchored in 100WF's mission, e.g.. a self-sponsored lunch.
- No sales pitches, product placement or recruitment.

- **Speakers**

- Where there are speakers, they:
  - Should be subject matter experts that people want to hear from.
  - Must NOT be from the same firm.
  - Must always include at least one female speaker.
- Where the format features 3 or less speakers (including moderator), one of the three can be from the sponsor firm.
- Where the format features four or more speakers, the moderator plus one panelist can be from the sponsor firm.
- Where a single speaker is proposed the organizer should refer to their main 100WF staff contact for guidance in advance.
- A 100WF volunteer typically makes introductory remarks and/or closing remarks.

- **Audience for different event types.**

- Events can be large or small depending on venue capacity and purpose.
- **“Education”** and/or **“Networking”**.
  - Open to ALL members including men, whose access fees are up to date.
  - Non-member guests can attend subject to venue capacity in accordance with 100WF’s guest policy.
- **“Peer Engagement”**.
  - Open ONLY to members within the relevant cohort whose access fees are up to date.
  - On specific occasions, non-member guests who meet the criteria of the cohort in accordance with 100WF’s guest policy can attend.
  - The aim is to create peer to peer connectivity and a community within specific groups of 100WF’s membership segmented by years of industry experience (Early Career, Mid Career, Senior Practitioner) and by some roles for senior practitioners (Peer Advisory Groups or PAGs).
- **“By Invite”**
  - Led by 100WF staff.
  - Curated group of professionals in the finance industry
  - Includes members and potential members/sponsors
  - Focus is on a theme/topic to raise visibility and build connections among participants
  - Aims to raise awareness of and build support for 100WF.
- A percentage of spaces at an event is assigned to the sponsor/host for their invitees (typically 10–15% but subject to the event capacity and topic). Sponsor/host collects RSVPs for their assigned spots. Note that sponsor/host guests do not have to be members, do not need to be logged in 100WF’s event management system (**“EMS”**) and 100WF’s guest policy does not apply to them.
- Members cannot be excluded from an event based on their firm or role (e.g. at the request of a sponsor).
- Non-members can attend subject to event capacity and 100WF’s guest policy.

- **Privacy**

- 100WF events are private and not for attribution.
- Photos may be taken at events and shared on 100WF’s social media platforms.
- 100WF does not share contact details of members or non-member guests with sponsors/hosts.

- **Sponsored or Self-Sponsored**
  - Events are usually sponsored/hosted by a financial services firm or service provider firm (e.g. law firm) that hosts the event at their venue or an external venue. Sponsorship is provided in-kind to 100WF, and the sponsor/host contracts with and pays any third-party vendors directly. Sponsor/host typically provides venue, refreshments, name badges and AV.
  - Self-sponsored events are usually smaller networking gatherings.
- **Virtual, in person or hybrid.**
- **Sponsor/host responsibilities for in person events (excluding Galas and 100WF Conferences)**
  - Provide a room with capacity appropriate to the location and the nature of the event with any agreed audio/visual equipment.
  - Offer light refreshments before and/or after the event.
  - Produce name badges for all attendees.
  - Provide registration table services and note no-shows/additional attendees. 100WF volunteers assist as needed.
  - If agreed, provide video-recording capabilities and/conferencing facilities. It is also possible to record via a laptop and Zoom.
  - Provide screens where 100WF event slides can be displayed.
- **Webinars**
  - There is a webinar sponsorship fee of per webinar payable to 100WF. Refer to 100WF staff for the current fee.
  - 100WF provides the Zoom webinar platform and facilitates delivery of the webinar.
  - Current 100WF webinar guidelines apply.
- **Invitations and language.**
  - Typically conducted in English, however local events can be in the local language. Global virtual events are always in English.
  - Invitations are in 100WF's template and 100WF has editorial control of the invite language. Invitations are usually in English but dual language invitations may be permitted on a case-by-case basis.
  - Invitations feature the sponsor/host logo and company description in accordance with the 100WF invitation template.

- **Promotion and Branding.**
  - 100WF sends the event invitation to the relevant mailing list and typically posts about the event once prior to the event and once after the event.
  - 100WF event holding slide is displayed on any screens at the event along with the Join 100WF slide and if applicable, the post event Survey QR Code.
  - 100WF roll up banner is displayed at the event if appropriate.
  - For each event, 100WF provides the holding slide and produces a flyer to post on 100WF's and the volunteers' social media channels.
- **Budget.** There is no 100WF budget for events, and 100WF does not pay venue/refreshment costs, speakers' fees/travel expenses, or provide/pay for speaker gifts or entertainment.
- **100WF events, not sponsor events.**
  - While 100WF events are hosted or sponsored by firms in the industry, they are 100WF events, not sponsor events, and 100WF guidelines and policies must be observed.
  - With the exception of certain organizations (associations such as a CFA Society, Investment Company Institute, AIMA, CAIA) and subject to prior approval by 100WF on a case by case basis, 100WF does not co-host or co-brand events or organize joint events.
  - 100WF does not share its members' contact details.

## Timelines and actions

For each event, the 100WF volunteer leading the event should:

- Ensure that there is no content or date conflict with another 100WF event. To be checked before an event date is finalised including with speakers/sponsor.
- Ensure that the event is entered into 100WF's event management system (EMS) ideally at least 8 weeks prior to the event date.
- Be aware that the event invitation is in a 100WF template and should be issued 4-6 weeks prior to the event date.
- Allow at least one week for an invitation to be prepared by 100WF.
- Ensure that all attendees check in and absentees are marked into EMS after the event regardless of whether a no show fee applies. This is to enable tracking.
- Take photos of the event including the speakers and email these to 100WF staff promptly after the event.

## Appendix 2: 100 Women in Finance Peer Advisory Group (PAG) Guidelines

These PAG Guidelines supplement the 100WF Volunteer Handbook.

Peer Advisory Groups (PAGs) are highly curated, peer-to-peer communities of senior women practitioners within 100 Women in Finance who work in specialized business functions or sectors.

PAGs create meaningful opportunities for members to exchange insights and strengthen professional networks through high-value engagement.

The purpose of each PAG, under the leadership of its chairs, is to foster strong peer engagement through small group discussion, thought leadership, and relationship building.

### PAG Membership and Criteria

#### **PAG Chairs**

- Are active, paid 100WF members.
- Hold senior leadership roles within the PAG's business function.
- Are committed to actively building and maintaining the PAG.
- Understand that PAG leadership is a volunteer responsibility requiring consistent engagement.
- Serve a two year term, renewable twice for additional two year terms. If a chair has served or will have served for more than three years as at 31 July 2026, they may continue to serve as a chair for a further period of up to two years as agreed with 100WF to enable an orderly transition.
- Are encouraged to review succession planning in collaboration with any co-chairs, vice chairs, and 100WF staff.
- Should maintain a suitable replacement for their role at all times and provide details to 100WF staff.
- Must step down from their chair role if requested by 100WF.

## **PAG Members**

- Are active, paid 100WF members.
- Hold senior practitioner roles aligned to the PAG focus area.
- Meet the seniority and peer-level expectations established by the Chairs.
- Provide bios for review and approval by the Chairs prior to joining.

## **Criteria**

- A PAG should have at least 20 paid members who are senior women working in a defined role within their organizations.
- PAGs are by location and sector (e.g., New York Business Development, London Sustainability).
- Chairs may add qualified members based in another location to the PAG at their discretion.
- Chairs review each potential member's bio and vet new members for entry to their PAG.
- Chairs and PAG members must be 100WF paid members. Non-members who otherwise qualify for membership of the PAG may attend one meeting prior to joining 100WF at the discretion of the Chairs.
- Chairs should review the list of PAG members regularly and remove/add people as appropriate and notify 100WF of changes.

## **PAG Meetings (Events)**

PAG meetings facilitate a valuable and dynamic network where all views expressed remain confidential. Chairs determine the format, content, and timings of their meetings in line with what works for PAG members.

PAGs may collaborate with other PAGs in the same location (joint PAG events) or by focus-area (cross-border PAG events).

## **Structure**

- Small and highly curated, not traditional large-scale programming.
- Ideally 5–20 attendees per meeting/event.
- Designed for discussion and peer exchange.
- Focused on active member participation.
- 90-minute sessions: one-hour meeting with 30-minutes networking.
- Minimum 2 – 3 meaningful engagements annually.

**Recommended formats**

- Roundtables, closed-door discussions.
- Leadership breakfasts or evenings.
- Small peer forums.
- Curated, brief, speaker-led discussions followed by conversation and member engagement.

**Confidentiality**

- Respect for peer dialogue.
- Non-solicitation expectations.
- Success depends on member adherence.

**Responsibilities and 100WF Support**

All PAG meetings must be submitted by Chairs into 100WF's Event Management System (EMS) for invitations, reporting, member engagement and RSVP tracking, and organizational visibility.

Initial invitations must be sent through EMS. Chairs may then personally follow up through direct outreach to drive participation. PAG Chairs and members should encourage guests to join 100WF as new paid members.

100WF is a volunteer driven organization supported by a small staff team. 100WF supports the infrastructure and Chairs are responsible and drive the success of the group.

**100WF provides:**

- PAG visibility on the website
- EMS support and infrastructure
- Reporting support
- PAG email addresses
- EMS training and operational guidance

**PAG Chairs are responsible for:**

- Developing and expanding the group
- Member vetting
- Event planning and attendance
- Calendar coordination
- Driving long-term value of the PAG

### ***Creating a New PAG***

- 100WF recruits PAG Chairs that meet the PAG criteria and goals.
- Chairs define the function or sector covered by the PAG and membership scope.
- Chairs determine if there is a need/interest in the new location or function/sector.
- If there is sufficient interest from qualified members, the PAG can be established, initially on a pilot basis, with approvals from 100WF.

### ***First PAG Meeting***

- Ideally, a 100WF representative attends the first PAG meeting.
- Chairs lead the meeting, share member bios, identify topics that are of interest to the group, set a forward calendar, and ask PAG members to refer new group members.

### ***Best Practices***

- 100WF may choose to survey PAG members or request feedback and successful outcomes measured by business connections through the PAG network.
- All PAG chairs should meet in person or by virtual meeting with 100WF to discuss PAG best practices and practical ways to improve the functioning of PAGs.

## **Resources**

Email questions to [peerengage@100women.org](mailto:peerengage@100women.org)

PAG website page listing all the Peer Advisory Groups and PAG Chairs:  
[100women.org/initiatives/peer-advisory-groups/](https://100women.org/initiatives/peer-advisory-groups/)

Volunteers' website: 100WF Handbook, EMS Guide and Event Planning Guide via member profile login: [members.100women.org/login](https://members.100women.org/login)

**[Please confirm that you have reviewed and agree to abide by the Handbook](#)**