



A women-forward initiative advancing:



Community



Leadership



Opportunity

What is WE by Wealthspire?

WE by Wealthspire is a firmwide women's platform designed to foster community, education, experiences, and connection across our firm and within the communities we serve.

It formalizes and amplifies a culture where women build meaningful careers, lead with confidence, and grow through mentorship.

A Strong Foundation

Wealthspire has long been a destination of choice for women.

At Wealthspire:

54% of employees are women

48% of advisors (AVP+) are women

133+ women in leadership roles

Why Now?

Women are influencing and controlling a growing share of wealth while redefining expectations of financial partnerships.

- » Women are expected to control \$34 trillion in U.S. financial assets by 2030, up from \$7.3 trillion just a decade ago
- » An estimated \$87 trillion of the \$124 trillion "great wealth transfer" is projected to pass to women between 2024 and 2028
- » The "horizontal wealth transfer" is a major driver, with 95% of surviving spouses receiving inherited assets being women
- » Millennial women are increasingly building wealth independently as entrepreneurs and investors, contributing to the narrowing of the gender wealth gap
- » Women are shaping investment priorities, with a focus on philanthropy, ESG investing, and long-term financial security

WE strengthens our ability to support women at every career stage, establish deep, trusted client and prospect relationships, and empower women to plan for the future.



When women and allies move forward together,
the impact is exponential.



“WE by Wealthspire reflects who we are at our best—collaborative, inclusive, and committed to long-term impact.”

NATALY SOGOLOFF

Community Outreach



strengthens our culture, advances women’s leadership, and reinforces our commitment to collective growth.