

Fueling DREAMS, BUILDING Wealth

- PATHWAYS TO FINANCIAL FREEDOM -

November 4 & November 18th - Dallas, Texas Tour Stops

PARTNERSHIP OVERVIEW

Women of Color & Capital is an initiative that focuses on the success of women of color as it relates to financial resources and opportunities. The four pillars are wealth building through financial freedom fundamentals and advisors, investing, capital for businesses (seed, growth, and late stage), and learning how to become investors and investment managers.

In partnership with JPMorgan Chase & Co., WOCXC is hosting a 6 part bespoke event experience to provide financial wellness tools and resources to women of diverse communities.

This impact report focuses on the two events of the tour in Dallas, Texas.



WOCXC IMPACT REPORT - NOVEMBER 4, 2023

THE PANEL DISCUSSION: FINANCIAL WELLNESS AND WEALTH BUILDING

Adeola Adejobi, Founder, Women of Color and Capital & Avant-Garde Network, moderated the panel discussion with Deepti Nagulapally, Vice President, Advice Lab, Behavioral Science Specialist, J.P.Morgan Private Bank and Michelle Godfrey, AFC, Vice President, Military & Veterans Affairs DEI Center of Excellence, JPMorgan Chase & Co.

During this conversation, we conducted a LIVE poll using Menti.com. Attendees were able to see the results of the poll as people were answering live. The poll results gave women in the room a clear picture of how women need to have more conversations about money and investing, and having just as much confidence that they have the ability to do so as their male counterparts.





Sponsored by
JPMORGAN CHASE & CO.

WOCXC IMPACT REPORT - NOVEMBER 4, 2023



TRANSFORMING YOUR MONEY MINDSET

52 women gathered together to hear from our curated special guest professionals.

This panel chat session was moderated by Dekonti MendsCole, Head of DEI for Corporate Responsibility, JPMorgan Chase & Co. featuring Courtney Sanders, MBA, Founder & CEO, CLS Training International, LLC. This session provided insight into the background of our relationship with money, rooted not just in numbers and transactions, but in emotions, experiences, and learned behaviors. Participants emerged with a renewed perspective and inspiration to get started or elevate their current financial journey.

INTERACTIVE ACTIVITY - DREAM BIG AND PLAN WISELY

This interactive active session was led by Schelo D. Collier, Founder of Black Women Invest.

In this segment, the attendees were able to write down their financial goals and say affirmations that allowed them to visualize and confirm their financial goals.



WOCXC IMPACT REPORT - NOVEMBER 4, 2023

PARTICIPANTS

48

VOTES

401

INTERACTIVE SLIDES

9

FINANCIAL WELLNESS AND WEALTH BUILDING PANEL - INTERACTIVE POLL RESPONSES

An interactive poll was conducted during the Fueling Dreams, Building Wealth event on November 4, 2023 which was led by Adeola Adejobi, Founder of Women of Color and Capital & Avant-Garde Network, Deepti Nagulapally, Vice President, Advice Lab, Behavioral Science Specialist, J.P.Morgan Private Bank and Michelle Godfrey, AFC, Vice President, Military & Veterans Affairs DEI Center of Excellence, JPMorgan Chase & Co.

The survey's primary objectives encompassed assessing the disparity between confidence and ability in financial investments, examining societal norms pertaining to finance, and exploring investment attitudes and perspectives among the event attendees.

The survey showed that 15 out of 48 participants feel confident about investing their money.

38 attendees also felt that men are confident about investing their money when compared to women.

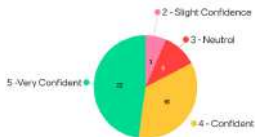
22% of the 48 participants in the survey also thought that men are unable figure out their households' financial needs poorly for the next 6 months as compared to women.

The stats for this is continued in the next page.

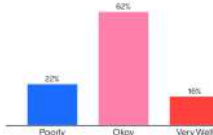
On a scale of 1-5, how confident do you feel about investing money?



On a scale of 1-5, how confident do you feel men are about investing money?



How well do you think men are able to figure out their households' financial needs for the next 6 months?



WOCXC IMPACT REPORT - NOVEMBER 4, 2023

ATTENDEES RESPONSES TO INTERACTIVE POLL

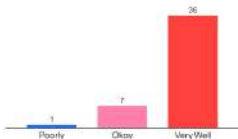
36 out of 48 attendees who participated in this survey thought that women are able to figure out their households' financial needs very well as compared to their male counterparts

12 out of 48 participants never or rarely speak with their friends about finances.

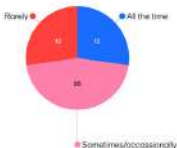
13 out of 48 participants only know 1 or no other woman who is an investor.

These outcomes are additional indicators of the ongoing necessity to continue this event and its impact in enhancing financial experiences for women of color.

How well do you think women are able to figure out their households' financial needs for the next 6 months?



How often does the topic of finances and investing come up when you speak with friends?



How many other women do you know who are investors? (ex. investing in real estate, businesses, friends and family, VCs, angel investing, etc.)



WOCXC IMPACT REPORT - NOVEMBER 4, 2023

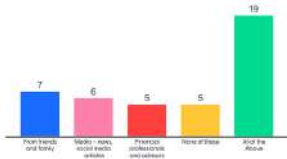
ATTENDEES RESPONSES TO INTERACTIVE POLL

In analyzing the participants responses to where they currently receive financial advice from, 5+ participants receive financial advice from financial professionals and advisors.

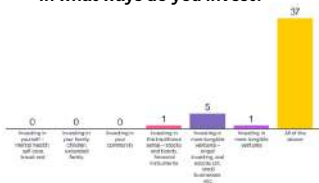
5+ participants currently invest in more tangible ventures and 1+ participant invest in the traditional sense which include stocks, bonds and financial instruments.

41+ participants agree that spending time with friends and family, doing things you love, having a home, nice things and the ability to travel and spend with ease are all elements of a good life.

Where do you currently receive financial advice?



In what ways do you invest?



What are the elements of a good life?



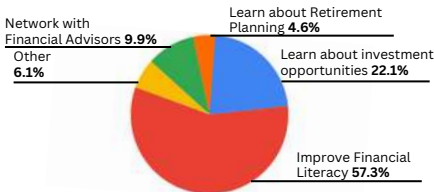
REGISTRANTS RESPONSE DATA

In analyzing the registrants responses for why they were interested in this event, 22.1% are interested in learning about investment opportunities and improving their financial literacy.

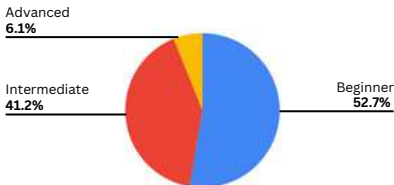
This explains why the majority of the women who registered have a beginner to intermediate level of knowledge when it comes to personal finance.

71.6% of registrants do not have financial advisors nor worked with one.

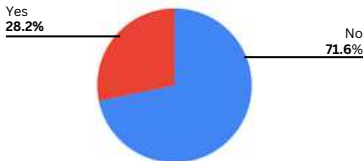
WHAT IS YOUR PRIMARY OBJECTIVE FOR ATTENDING THIS EVENT?



WHAT IS YOUR CURRENT LEVEL OF KNOWLEDGE ON PERSONAL FINANCE?



DO YOU CURRENTLY HAVE A FINANCIAL ADVISOR OR HAVE YOU EVER WORKED WITH ONE?



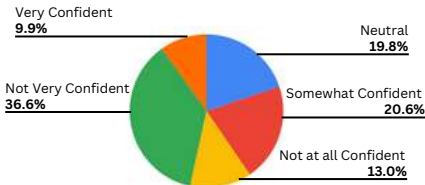
REGISTRANTS RESPONSE DATA

9.9% of registrants are very confident about planning for retirement. This explains why most of the registrants were interested in this event because they wanted to learn about investment opportunities.

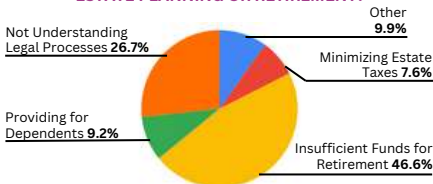
This also explains why the biggest concern for 46.6% of the registrants regarding estate planning retirement is not having sufficient funds for retirement.

The data also showed that 20.6% of registrants heard about this event from various social media channels including paid media by WOCXC and 5.3% from the Women of Color and Capital Newsletter.

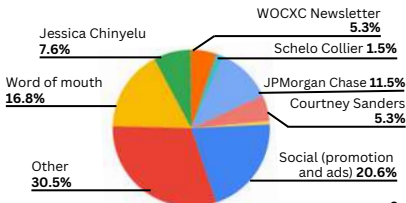
HOW CONFIDENT DO YOU FEEL ABOUT PLANNING FOR YOUR RETIREMENT?



WHAT IS YOUR BIGGEST CONCERN REGARDING ESTATE PLANNING OR RETIREMENT?



HOW DID YOU HEAR ABOUT THIS EVENT?



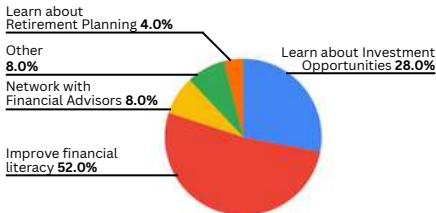
ATTENDEES RESPONSE DATA

In analyzing the attendees responses as to why they were interested in attending this event, 28% are interested in learning about investment opportunities and improving their financial literacy.

This explains why the majority of the women in the room have a beginner to intermediate level of knowledge when it comes to personal finance.

We discovered that there is an opportunity to amplify JPMorgan Chase & Co. advisors since more than 74% of attendees do not have financial advisors nor have worked with one.

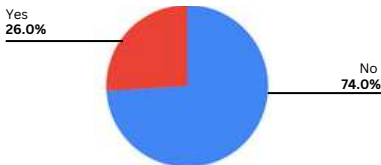
WHAT IS YOUR PRIMARY OBJECTIVE FOR ATTENDING THIS EVENT?



WHAT IS YOUR CURRENT LEVEL OF KNOWLEDGE ON PERSONAL FINANCE?



DO YOU CURRENTLY HAVE A FINANCIAL ADVISOR OR HAVE YOU EVER WORKED WITH ONE?



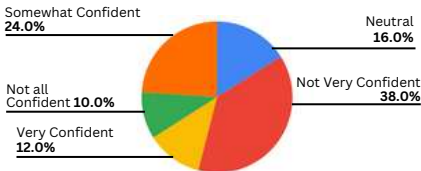
ATTENDEES RESPONSE DATA

In analyzing the attendee responses for how confident they feel about planning for retirement, 48% do not feel confident and 16% had a neutral response.

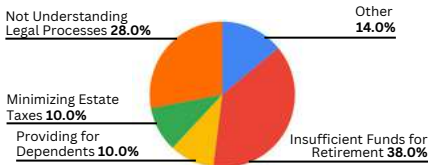
28% of attendees said their biggest concern regarding estate planning or retirement is not understanding legal processes and for 38% of attendees, it was insufficient funds for retirement

The analysis also showed that 14.0 of registrants heard about this event from various social media channels including paid media by WOCXC and 6% from Women of Color and Capital Newsletter.

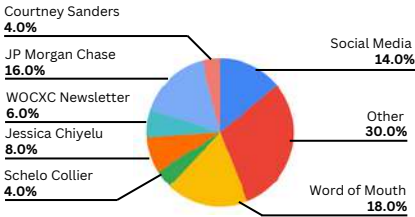
HOW CONFIDENT DO YOU FEEL ABOUT PLANNING FOR YOUR RETIREMENT?



WHAT IS YOUR BIGGEST CONCERN REGARDING ESTATE PLANNING OR RETIREMENT?



HOW DID YOU HEAR ABOUT THIS EVENT?



WOCXC IMPACT REPORT - NOVEMBER 4, 2023

The Fueling Dreams, Building Wealth, November 4th event was a success!

We helped expand knowledge and provided black and brown women with a direct connection to financial wellness and wealth-building education.

THE DELIVERABLES

- 2 Events in Dallas, Texas
- Speaking Opportunities for JPMC Employees
- Organic and paid event promotion via Instagram and LinkedIn posts
- Email & Social Marketing Collateral
- Registration Data
- Post Event Survey Data



REGISTERED

131

ATTENDED

52

ATTENDEE FEEDBACK SURVEY RESPONSES

NUMBER OF
PARTICIPANTS

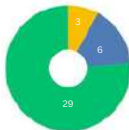
38

COMPLETION RATE

100%

The survey responses show that the attendees enjoyed the event overall. The sessions included Estate Planning led by Veronica Rose, Estate Planning: Securing Your Future by moderated by Adeola Adejobi with Ashley Stepps as the speaker and an interactive activity led by Adeola Adejobi.

How would you rate the Dream Big and Plan Wisely Interactive Activity by Schelo Collier overall?



● Outstanding
● Great

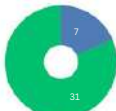
● Good
● Okay
● Needs work

How much did you enjoy the Fueling Dreams, Building Wealth event?



● I loved it! Can't wait for additional WOCXC/JPMC events!
● I enjoyed the event!
● I thought the event was really good!
● I thought the event was okay.

How would you rate the panel discussion with Deepti Nagulapally, Adeola Adejobi and Michele Godfrey on Financial Wellness and Wealth Building?



● Outstanding
● Great

● Good
● Okay
● Needs work

How would you rate the Transforming Your Money Mindset session by Dekonti Mends-Cole and Courtney Sanders?



● Outstanding
● Great

● Good
● Okay
● Needs work

WOCXC IMPACT REPORT - NOVEMBER 4, 2023

WHAT ATTENDEES SAID ABOUT THEIR EXPERIENCE...

This is an impactful event that brings thought leaders, change makers, and resources together with those seeking information and direction. Having access to such a wealth of information and being in the room with like-minded individuals is rewarding in so many ways! - **Natara J.**

I truly enjoyed this event and it lit a spark in me to be proactive and change my mindset in terms of abundance and building generational wealth. It was empowering to see so many women in business and learning from those on stage and even from fellow attendees. - **Julene N.**

SÚPER informative and helped build my confidence and self esteem in my value and ability to invest. - **Nicole G.**

I came to the event by myself and it was amazing! I can see this growing and expanding on a much bigger scale. - **Alexis M.**

I love how intimate the setting was and how you could network with others. The event was empowering. - **Brandy V.**

A great opportunity to be in the room with women of color! Uplifting each other, and trying to find some financial freedom!!! Thank you so much for the opportunity and all the great information!!! - **Tamika Craft.**

This was really right on time in my life as I am really seeking and committed to leaving a financial legacy for my family and the community. - **Chevonda A.**

I loved the energy and raw truths about how you need to believe in being worthy of wealth! I'm leaving here more confident on my wealth journey. - **Monisha A.**

This was an outstanding event! I am leaving here feeling full of intellectual wealth and with a clear plan for the future. - **Shaudae M.**



Saturday, November 18, 2023
PROGRAM SUMMARY AND DATA





PANEL ESTATE PLANNING: SECURING YOUR FUTURE

Our second session was a panel discussion moderated by Adeola Adejobi, Founder of Women of Color and Capital and Avant-Garde Network and featuring Ashley Stepps, Managing Partner at Rippy, Stepps & Associates. This session provided insight into generational wealth, why it's important for diverse communities and estate planning.

ESTATE PLANNING PRESENTATION

46 women gathered together to hear from our curated special guest professionals.

The first session was an Estate Planning presentation by Veronica Rose, J.P. Morgan Private Client Advisor, Vice President - Investments.

Many of the women asked questions about how to become an advisor, how they can schedule time with Veronica to discuss more on the subject matter, and how they can work with JPMorgan Chase as a part of their wills/trusts process. Veronica did an excellent job at providing information that was timely for a lot of attendees and giving each woman her undivided attention after her segment when they asked her questions.



WOCXC IMPACT REPORT - NOVEMBER 18, 2023

WOCXC INTERACTIVE ACTIVITY

Adeola Adejobi, Founder, Women of Color and Capital & Avant-Garde Network, led an interactive session that allowed attendees to work together and apply what they learned in previous sessions.

Attendees were provided with different financial decision making scenarios and worked independently and in groups determine what they thought was the best financial decision. After working in groups, one person from each group presented the results to the audience.



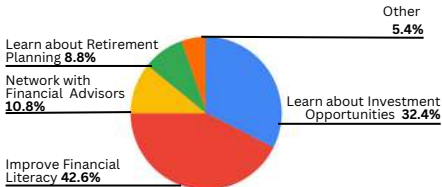
REGISTRANTS RESPONSE DATA

In analyzing the registrants responses as to why they were interested in attending this event, 42.6% were interested in improving their financial literacy.

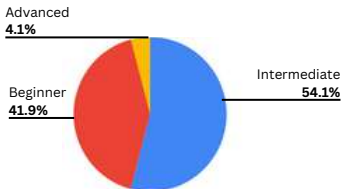
This explains why the majority of the women in the room have a beginner to intermediate level of knowledge when it comes to personal finance.

We discovered that there is an opportunity to amplify JPMorgan Chase & Co. advisory outreach since because 66% of attendees do not have financial advisors nor have they worked with one in the past.

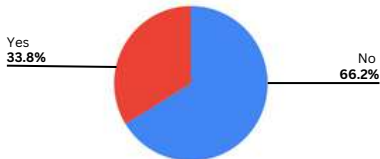
WHAT IS YOUR PRIMARY OBJECTIVE FOR ATTENDING THIS EVENT?



WHAT IS YOUR CURRENT LEVEL OF KNOWLEDGE ON PERSONAL FINANCE?



DO YOU CURRENTLY HAVE A FINANCIAL ADVISOR OR HAVE YOU EVER WORKED WITH ONE?



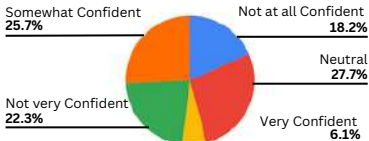
REGISTRANTS RESPONSE DATA

In analyzing the registrants responses regarding how confident they feel about planning for retirement, 18.2% do not feel confident at all and 22.3% were not very confident.

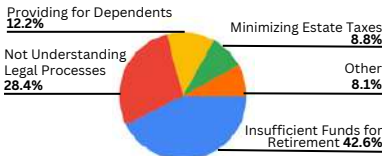
42.6% of registrants said their biggest concern regarding estate planning or retirement is not having sufficient funds for retirement and 28.4% of registrants are concerned about not understanding the legal processes.

The data also showed that 20.3% of registrants heard about this event from various social media channels including paid media by WOCXC and 10.8% from the Women of Color and Capital Newsletter.

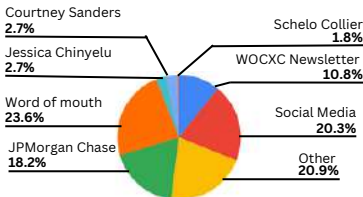
HOW CONFIDENT DO YOU FEEL ABOUT PLANNING FOR YOUR RETIREMENT?



WHAT IS YOUR BIGGEST CONCERN REGARDING ESTATE PLANNING OR RETIREMENT?



HOW DID YOU HEAR ABOUT THIS EVENT?



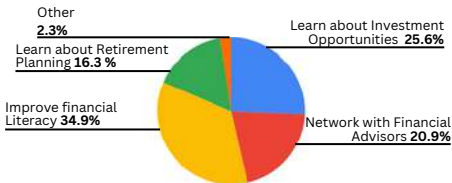
ATTENDEES RESPONSE DATA

In analyzing the attendee responses for why they were interested in attending this event, 60.5% are interested in learning about investment opportunities and improving their financial literacy.

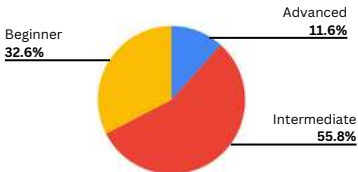
This explains why the majority of the women in the room have a beginner to intermediate level of knowledge when it comes to personal finance.

We discovered that there is an opportunity to amplify JPMorgan Chase & Co. advisors since more than 48.8% of attendees do not have financial advisors nor have worked with one.

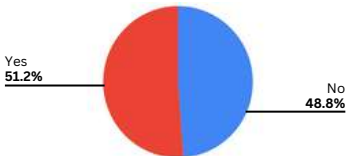
WHAT IS YOUR PRIMARY OBJECTIVE FOR ATTENDING THIS EVENT?



WHAT IS YOUR CURRENT LEVEL OF KNOWLEDGE ON PERSONAL FINANCE?



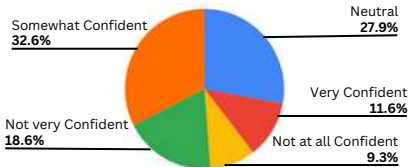
DO YOU CURRENTLY HAVE A FINANCIAL ADVISOR OR HAVE YOU EVER WORKED WITH ONE?



ATTENDEES RESPONSE DATA

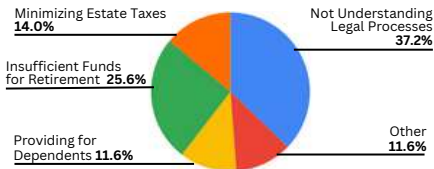
In analyzing the attendees responses for how confident they feel about planning for retirement, 18.6% do not feel very confident and 27.9% had a neutral response.

HOW CONFIDENT DO YOU FEEL ABOUT PLANNING FOR YOUR RETIREMENT?



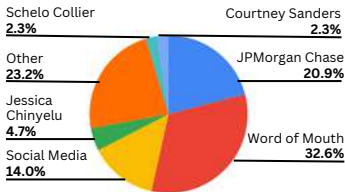
25.6% of registrants said their biggest concern regarding estate planning or retirement is not having sufficient funds for retirement and 37.2% of registrants were concerned about not understanding the legal process.

WHAT IS YOUR BIGGEST CONCERN REGARDING ESTATE PLANNING OR RETIREMENT?



The data also showed that 32.6% of registrants heard about this event from word of mouth, 14% from organic and paid social media and 20.9% from JPMorgan Chase.

HOW DID YOU HEAR ABOUT THIS EVENT?



The Fueling Dreams, Building Wealth, November 18th event was a success!

We helped expand knowledge and provided black and brown women with a direct connection to investing and estate planning education.



THE DELIVERABLES

- 2 Events in Dallas, Texas
- Speaking Opportunities for JPMC Employees
- Organic and paid event promotion via Instagram and LinkedIn
- Email & Social Marketing Collateral
- Registration Data
- Post Event Survey Data



TESTIMONIALS

REGISTERED

146



Tamika Sanders, PhD • 3rd+
Business Consulting | Marketing &
Communication | Employee Experience | Strategist
6d • 6dmin • 6d

Thoroughly enjoyed working with Adeola Adejobi and the JPMorgan Chase & Co. team in Dallas for the "Fueling Dreams, Building Wealth" event to provide women with the pathways to achieve financial freedom! All the attendees left with tangible action plans, resources and tips to help them reach their financial goals. Proud to be a part of the Women of Color and Capital team!

#wocxc #wocxc2023 #fuelingdreams
#buildingwealth #jpmorganchase



De'Andra Onyekwere, MBA • 3rd+
Experienced, Independently Motivated
Commercial/Real Estate Professional
6d • 6d

Yesterday, I had the privilege of attending Women of Color and Capital Fueling Dreams, Building Wealth, hosted by PROJECT REAP Alum Adeola Adejobi, Esq. and sponsored by JPMorgan Chase & Co. I connected with some phenomenal women! I'm looking forward to the conference.

#womeninbusiness #womenempoweringwomen
#buildingwealth

39 women who registered for the November 4th registered for the November 18th event.

16 women who attended the November 4th event, attended the Nov 18 event.

ATTENDED

46

ATTENDEE FEEDBACK SURVEY RESPONSES

PARTICIPANTS

34

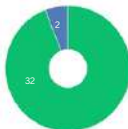
COMPLETION RATE

100%

ATTENDEES SURVEY RESPONSES

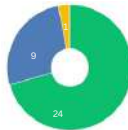
The survey responses show that the majority of attendees loved the event! The sessions included the Estate Planning Session led by Veronica Rose, the Estate Planning: Securing Your Future panel discussion with Ashley Stepps, Esq., and Adeola Adejobi, Esq., and the Interactive Activity with Adeola Adejobi, Esq.

How much did you enjoy the Fueling Dreams, Building Wealth event?



- I loved it! Can't wait for additional WOCXC/JPMC events!
- I enjoyed the event!
- I thought the event was really good!
- I thought the event was okay.

How would you rate the Estate Planning session by Veronica Rose



- Outstanding
- Great
- Good
- Okay
- Needs work

How would you rate the Interactive Activity with Adeola Adejobi, Esq. overall?



- Outstanding
- Great
- Good
- Okay
- Needs work

How would you rate the panel discussion with Ashley Stepps, Esq. and Adeola Adejobi, Esq. on Estate Planning: Securing Your Future?



- Outstanding
- Great
- Good
- Okay
- Needs work

WOCXC IMPACT REPORT - NOVEMBER 18, 2023

WHAT ATTENDEES SAID ABOUT THEIR EXPERIENCE...

I hope to NEVER miss another event, and know AT LEAST 20 OTHER SISTAHS that I will encourage to come next year! - **Peggy A.**

I love to see women of color sharing knowledge and empowering their sisters with information that will make them and life better. We need more sessions like this. - **Charlondra T.**

The education was provided in a relatable way. The interactive activity was excellent, it allowed us to collaborate and hear different perspectives. - **Tiffany A.**

The information was given in a clear, concise, and direct manner. The presenters were informative, as well as warm and welcoming. - **Mimi N.**

Loved the portion with Ashley! She was approachable, informative, and straight up! More, more, more of her! - **Lindsay A.**

Honestly being around women of color in this learning environment I soaked up more knowledge than I could've imagined - **Victoria S.**

I Thank God for this Summit!!!! I needed this to look at my Life for a BLESSED FUTURE GOD HAS PROMISED!!!!!! - **Chiniqua A.**

The speakers were all different but very informed and explained things in a great engaging way. The interactive piece was especially helpful. - **Grace M.**

Great crowd! Great music! Great food! Great speakers! Thank you son much! This gave me a reason to get dressed up and get out the house on a Sat afternoon!! - **Tameka S.**

I plan to schedule meetings with Ashley and Veronica as a result of this event. Thank you! - **Mimi N.**

WOCXC IMPACT REPORT - NOVEMBER 4 & 18, 2023

The Fueling Dreams, Building Wealth, events on November 4th and 18th were a huge success!

We helped expand knowledge and provided
black and brown women with a direct
connection to investing and estate planning
education.

We look forward to our upcoming events in
Atlanta in 2024!

THE DELIVERABLES

- 2 Events in Dallas, Texas
- Speaking Opportunities for JPMC Employees
- Organic and paid event promotion via Instagram and LinkedIn
- Email & Social Marketing Collateral
- Registration Data
- Post Event Survey Data

**TOTAL
REGISTERED
277**

**TOTAL
ATTENDED
98**





IMPACT REPORT

November 4 and 18 Dallas Tour Stops

CONCLUSION

The Fueling Dreams, Building Wealth tour in Dallas included a total of 98 unique attendees. This series impacted the lives of 98 Black and brown women by giving them wealth-building tools and resources.

Women of Color and Capital looks forward to our next stops in Atlanta, Georgia (February 2024) and transforming the lives of more women by placing them on a path to financial freedom.

