



Notes from Jane

[Jane Newton CFP®, MBA](#)

Managing Partner and Wealth Advisor

April 26th marked eight years of the Forum community - a period of significant growth for the Forum community and for each of us individually. This year's theme, "Recharging in Times of Change," is so relevant as we head into summer. I hope you have the opportunity to recharge yourself over the summer!

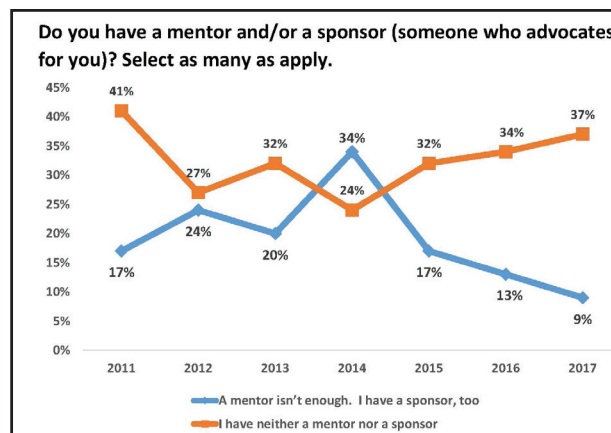
The rich content of this year's Forum spurred numerous ongoing dialogues and captured media interest. These conversations prompted me to launch the RegentAtlantic Wall Street Women Forum newsletter as a vehicle for sharing articles about the Forum, our speakers, upcoming events, and Forum alliances and partnerships. The newsletter will come out twice a year. I welcome and encourage you to continue to share your stories with me as well as to reach out with questions and comments to make the Forum community even more impactful for you.

Each year, I ask Forum participants a series of questions. Your answers reveal significant trends and provide insight to what may be on the horizon for the Forum community specifically, and our industry more generally. Your responses in April were telling! See the surveys here: [What's on Your Mind?](#)

Let's zoom in, for example, on sponsorship, a topic the Forum community has been talking about for years and is now one of the hottest topics in the media. This year, only 9% of you – down significantly from prior years – said you have a sponsor. At the same time, you also identified sponsors as key to your professional advancement (38% of you said the lack of sponsors is the biggest barrier to your success). Clearly high-level women on Wall Street recognize the need for sponsors to advocate for us! Learn more at our Upcoming Events section.

Enjoy your summer. We look forward to seeing you in the fall!

Jane



Summer 2017

Upcoming Events

[Monica Rich Kosann](#)

Shopping Event to benefit WIN

Wednesday, September 13

6:00 pm

The Shops at Columbus Circle

10 Columbus Circle, Ground Floor
New York City

The Wall Street Women Forum is partnering with Société Générale's Americas Women's Network (AWN) on a program on sponsorship, open to the Forum community. Jane Newton is a speaker on the panel.

Tuesday, October 24

6:00 pm – 8:00 pm

245 Park Avenue, New York City

Details to follow.

For more information, please [email us](#)

**Find out more about
RegentAtlantic's
upcoming events**

Read More on Sponsorship

[This Is the No. 1 Thing Holding Women Back on Wall Street](#)

[Taking the Pulse of Women on Wall Street](#)

Wall Street Women Forum in the News



Lissa V. Young

Keynote Speaker Professor [Lissa V. Young](#) shared her life experiences and lessons learned through her years with the United States Military Academy at our most recent Wall Street Women Forum. Journalist Holly Dutton of *Real Estate Weekly* lauded her as a “military trailblazer” who [lives her life out loud](#).

Jane Newton speaks to *Vanity + Trade* by Debra Chen about her experience of advising and helping inspire women who work at the top of the financial services industry. [Read more](#) about Jane’s thoughts on staying relevant.

In the *Huffington Post*’s article, [One Day at a Time to the Corner Office, Especially as a Woman](#), Joan Michelson numerates the ways women can navigate tricky moments to advance their careers. She cites the Wall Street Women Forum as a “candid” source for lessons.



Joan Michelson

Jane Newton recently spoke as a panelist at Financial Advisor's Invest in Women Conference in Dallas. Her topic, “Finding Your Niche,” highlighted Jane’s professional journey from corporate finance to working with high-powered women on Wall Street. Jane [describes how she built her practice niche](#). Read Christopher Robbins of Financial Advisor’s article on Jane’s talk in [“To Avoid ‘Kiss of Death,’ Find Your Niche Clients.”](#)

Wall Street Women Forum Exclusive Alliance with Julia Pimsleur **Street Sisters: Connecting Wall Street Women and Female Founders**

Street Sisters is a new mentorship program created by the Million Dollar Women Summit that matches women who work in finance with their “little sisters” who are entrepreneurs with fast growing businesses. As a mentor, you would donate three hours of your time in person, phone, or Skype to help an entrepreneur tackle one or more financial projects in her business. You may continue meeting with your mentee but are not obligated beyond the three hour initial meeting.

Questions?

[Email julia@littlepim.com](mailto:julia@littlepim.com)

Photo Highlights of the 8th Annual Wall Street Women Forum



Relevant RegentAtlantic Insights

Health Savings Accounts – Have Your Cake and Eat it Too!

We believe that Health Savings Accounts (HSA) are one of the best retirement accounts available and may be one of the first accounts you consider saving into for retirement.

When It's Time for Your Aging Parents to Move: A Guide for Adult Children

Jim Ciprich, Wealth Advisor, interviewed three adult children who recently went through the process of helping a parent with the transition to a Continuing Care Retirement Community (CCRC).

New Era of Sustainable Investing: Environmental, Social and Governance (ESG)

Companies (and entire countries) that incorporate ESG principles into their corporate strategies show us that sustainable investing *works*.

You and Your Money

How can you be confident...

- ☐ you can afford to change jobs or call it quits?
- ☐ you're prioritizing every dollar of cash flow in the best way for you?
- ☐ your investments are aligned with your needs and goals?

WHAT ARE YOU WAITING FOR?

Grab a Java with Jane to figure out what you're missing.

Jane Newton

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www.wallstreetwomenforum.com

www.regentatlantic.com

RegentAtlantic at a glance*

As a Registered Investment Advisor (RIA), we have always been fiduciaries.

\$3.4 B

Assets Under
Management (AUM)

35

Years in business
- since 1982

18

Wealth Advisors

38

States where we
have clients

50

Employees

regent
atlantic®

*As of June 19, 2017

About the RegentAtlantic Wall Street Women Forum

The RegentAtlantic Wall Street Women Forum provides a unique community for high-level women on Wall Street to gather with their peers across the industry to address career and personal challenges in a rapidly changing landscape. By invitation only, the Forum is limited to women with significant experience and responsibility on Wall Street. The Forum is renowned for delivering high-quality, actionable content to support participants' continued professional and personal success.

**Jane Newton, CFP®, MBA****Managing Partner and
Wealth Advisor****Founder, RegentAtlantic Wall Street Women Forum**

Jane Newton advises individuals and families to help them realize their financial and personal objectives. Drawing on her Wall Street background, Jane has a particular focus on the unique planning and investment needs of women on Wall Street, extending to their career and personal issues. In addition to helping clients address the challenges surrounding employer stock-related compensation, Jane recommends strategies to minimize estate and income taxes and reduce risks. Her expertise includes evaluating career options in the context of each client's goals. Jane and her team are experienced in adapting processes to handle compliance constraints imposed by clients' employers. Jane founded the RegentAtlantic Wall Street Women Forum for high-level women in the industry.



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Important Disclosure Information

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