



Notes from Jane

Jane Newton CFP®, MBA
Managing Partner and Wealth Advisor

Our April 18th Forum clearly struck a chord with its theme, “What’s Possible...?” With this year’s program focused on the relationships we need in order to succeed, preparing strategically for career transitions, and having a compelling narrative, our guests left with fresh insights, action plans and new connections to forge ahead in their professional and personal lives.

A highlight of each Forum is revealing to our audience their answers to a series of questions. If you want to know what’s top of mind for high-level women in financial services, check out their eye-opening responses: [What the Forum Community Is Thinking](#).

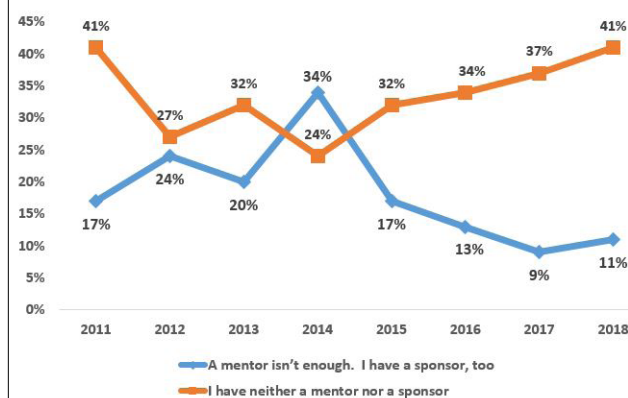
Let’s zero in on two challenges. Only 11% of you said you have a sponsor – up slightly from last year, but still surprisingly low.

Especially since you also identified sponsors as key to your professional advancement (a whopping 54% cited the lack of sponsors as the biggest barrier to your success).

And what makes our theme “What’s Possible...?” so relevant today? We know from your input that many of you feel a sense of fulfillment with your current roles. At the same time, at least 1/3 of you are really ready for a change. Almost half of the women in the Forum community said that financial anxiety would hold them back

continued on page 4

Do you have a mentor and/or a sponsor (someone who advocates for you)? Select as many as apply.



An interview with Lisa M. Shalett



Former Partner, Goldman Sachs; Independent Board Director; Advisor to Startups; April 2018 Forum Keynote Speaker

This interview has been condensed; click [here](#) for the full version.

Jane Newton: You decided to leave a long and successful career at Goldman. What prompted that?

Lisa Shalett: I believe that the concept of “career path” is fundamentally changing. When I decided to leave Goldman after 20 years, many colleagues who had also been there a long time were shocked I would leave. When I subsequently went to a startup and worked with a founder and team in their 20s, they were shocked that anyone would work at the same place more than 3 years not to mention 20! Over a career, one evolves – developing new interests, skills and priorities. Is staying where you are a safe default or a decision? It’s important to ask yourself, “What makes me happy?”

continued on page 2

Summer 2018

Upcoming Events

Monica Rich Kosann
Wall Street Women Forum Shopping Event to benefit Girls Who Code

November 14, 6:00 pm
The Shops at Columbus Circle
New York City

RegentAtlantic Events

Retirement Outlook
Taxes, Withdrawal Strategies, and Prioritizing Your Next Steps

September 13 or September 26 - New York City
September 27 - Morristown, NJ

You and Your Aging Parent
Navigating the Legal, Financial and Emotional Maze: A Panel Discussion

October 9 - New York City
October 16 - Morristown, NJ

Learn more about RegentAtlantic’s [upcoming events](#)

Save the Date

10th Annual Wall Street Women Forum

April 3, 2019

I was lucky to have a number of very different experiences over my Goldman career. But one day it suddenly hit me, when my older son was a sophomore in high school and my younger son was about to enter high school, that time was flying. This reoriented my priorities around spending more time with them while they were still home. I knew that when I work, I like to be “all in” so the best action for me was to cut the cord. It was really difficult to leave a place I loved, but that proved to be a great decision for me.

Jane: Did you leave with a specific plan?

Lisa: I intentionally left without a “next thing” – not everyone has that option depending on their financial situation, but I knew that if I tried to find a next thing while working, I was very likely to keep doing the same types of things. Rather, I wanted to take the time to explore and discover new types of opportunities, or new ways to use my skills and experience. That was profoundly uncomfortable, especially whenever anyone would ask me the inevitable “so, what do you do” question, but a good kind of uncomfortable, because it was all about learning. These days I have a lot of control over my time and spend much of it advising startups. I love the way that challenges me, keeps me learning new things, and enables me to use my experience to contribute to a founder’s success.

“I have been offered some opportunities that people thought I should not take. Then I thought, what could go right?”

Jane: It’s hard to think about our career path while sprinting at work day after day. You pointed me to a great example in what Shonda Rhimes – the television producer and screenwriter of *Grey’s Anatomy* and *Scandal* – calls “The Hum.” Tell us about The Hum and what it means to you.

Lisa: Shonda Rhimes’ awesome TED Talk is the best articulation of what I really used to enjoy at work. Shonda loved her work and described that feeling of being energized and in the zone as The Hum. The Hum can be entrancing and addicting, and sometimes it can make us lose track of time... This made

me realize that it’s a great practice to set aside time every year to think about my goals and priorities, how I want to learn and grow... to keep me clear on what I want. Or I’ll risk losing myself in the flow.

Jane: You’ve made some unexpected career moves. What is one example of a lesson learned?

Lisa: I have been offered some opportunities that people thought I should not take. For example, few people could get their head around the opportunity to move from Head of International Equities to become Chief Operating Officer of Global Compliance. Initially that was my reaction, too – and then I allowed myself to think, what are the positives, what can this role enable, what can go right?... Thinking of it that way, it went from a “whoa” to a “WOW” of an opportunity.

Jane: Our April Forum included a timely workshop on “creating your narrative.” Tell us about building your own brand.

Lisa: You need to tell your story the way you want it told. People allow others to tell their story, and more often than not it is not told the way they’d want it. So think about what you want to be known for; seek feedback to see if you are actually known for those things (and if not, then what). If there is a gap, then that is a clue as to how you need to start repositioning yourself. A control-your-narrative opportunity I see missed all the time: how you let people introduce you. It’s better for you to provide the bullets and the story. That not only makes it easier for the other person; it also positions you the way you want to be positioned.

“[At the Forum] I was surprised by how few women felt they had a sponsor.”

Jane: What was your biggest takeaway from the April Forum?

Lisa: That it is such a powerful experience to have these conversations in a community like the Forum. But conversations have to lead to actions! I look forward to hearing more stories of how people are experimenting and applying the actionable advice they heard.

Jane: Any surprises from the April Forum?

Lisa: I was really surprised by two things revealed in the audience survey: the lack of confidence within an audience of such accomplished women, and also how few women felt they had a sponsor. We have to get over the negative voices in our heads. The book, *Positive Intelligence* by Shirzad Chamine offers some very valuable methods for squelching those voices that hold us back.

What’s Possible...?

email Jane Newton
jnewton@regentatlantic.com

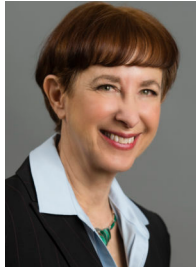
Wall Street Women Forum Exclusive Alliance with Julia Pimsleur

Street Sisters: Connecting Wall Street Women and Female Entrepreneurs

Street Sisters is a 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 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

Liz Hogan on Street Sisters - I find Street Sisters so rewarding because it not only allows me to help female founders but it also gives me access to women entrepreneurs across many different industries (which wasn’t my exposure on Wall Street). It allows me to help them take a consistent approach to how they tackle business strategy and finance-related issues that arise. The one-on-one one-hour call is a quick commitment and it allows me to help more women more often. For the entrepreneurs, it gives them a free hour of advice that they would have a hard time getting outside of an accelerator program. It is also broader advice than calling an accountant or lawyer.

Liz Hogan, Advisor, Capco Consulting; Former: Americas, Deputy Head of Global Markets and Treasurer, Société Générale, NY; Street Sisters mentor



An interview with Joann S. Lublin

Career columnist, *The Wall Street Journal*; Author, *Earning It: Hard-Won Lessons from Trailblazing Women at the Top of the Business World*;

April 2018 Forum Panel Moderator

This interview has been condensed; click [here](#) for the full version.

Jane Newton: Joann, you moderated a hugely popular session at our Wall Street Women Forum, aptly called “Career Transitions Are the New Normal: Cultivating the Transition Mindset.” What was your biggest takeaway from the panel and the conversations that day?

Joann Lublin: Each panelist actually navigated his or her career transitions so well. There are a couple of things they each did that made it seem so seamless, despite bumps along the way. One is that they were willing to take some risks and think outside the box as to what they were going to do next in their lives and in their careers. Two, the speakers also had a lot of belief and confidence in themselves and in their ability to get through a rough patch in their lives, as change always is. If we don’t embrace change, we’re going to have a really boring life.

Jane: You’ve interviewed scores of executive women about their career successes and challenges. What is the #1 thing that we as Wall Street women need to know to best navigate career transitions?

Joann: Remember the importance of fostering your strong external network, and not just when you’re trying to navigate a career transition. If your external network is not fully and firmly developed and nurtured, you’re not going to have many people to turn to for help when you need it.

Relationships are built on a two-way street. You’re giving as much as you’re getting. No matter where you are in your career, you always have something to give back, even if you don’t think you do. Ask yourself: “Have I paid it forward today? Have I returned what I’ve been given? Have I given before I got?” If you help other people be successful, whether it’s your internal or external network, they’re going to help you be successful.

Jane: We talk a lot about the invaluable role sponsors play in helping us continue to advance in our careers. How can a sponsor make a difference for high-level women on Wall Street?

Joann: If you don’t have a sponsor, someone who’s willing to put their personal and professional reputation on the line on your behalf, you’re not going to have someone speaking up for you in the critical moments in your career. Look for sponsors not just inside your company, but outside, too.

Jane: I always say sponsorship has to be earned. What is your advice on cultivating a sponsor?

Joann: You have to get known for what you’re good at by the people who you want to be your sponsor.

Identify areas of the company you’d like to move into or, if you want to change industries, find the industry group where you can get known. For example, attend an important industry association event, identifying ahead of time two or three speakers who are movers and shakers in that industry and set up coffee or drinks with them before the conference starts.

“If we don’t embrace change, we’re going to have a really boring life.”

Jane: At the Forum, you saw the audience’s answers to the questions we asked about what’s possible. Many of the women in the Forum community are happy in their current roles, yet over one-third are really ready for a change. So we asked what’s holding them back from making a career transition. Almost half cited financial anxiety, with less than half knowing how much in net worth is needed to have the confidence to move forward. What is your reaction to this?

Joann: I’m surprised that fewer than 50% know how much money they must have in the bank to be able to move forward confidently.

Jane: That anxiety does explain why sometimes they get stuck. Because they ask themselves “what if?” What would you suggest they do to get unstuck?

Joann: I suggest they spend a little of that money to invest in themselves. First of all, they should find out how much money they have and how it may support their career transition plans. Just as important, they should invest in an executive coach, particularly to help them position themselves, brand themselves, market themselves. An executive coach can really make a difference in their ability to make a successful career transition.

Photo Highlights of the 9th Annual Wall Street Women Forum



from making a career transition (47%). That's perhaps expected, as less than half of you have quantified what "your number" is. Do you wonder what your number is, and how you're going to get there?

How can I and the Forum community help you move forward with confidence?

1) **Take advantage of the insights and tactics our speakers share** – See what Lisa Shalett and Joann S. Lublin have to say.

2) **Check out the Resources recommended by our 2018 speakers** – [click here](#)

3) **Attend our events** – See sidebar on page 1 for upcoming Forum and RegentAtlantic events.

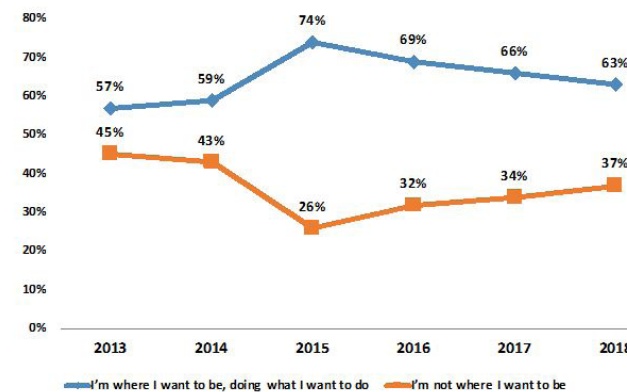
4) **Schedule your What's Possible...? conversation with me** – As a member of the Forum community, you deserve to have clarity and confidence in making significant career and personal decisions. Many of you have already met with me since our April Forum to see

what's possible for you financially. I would be pleased to make 2018 the year you realize what's possible for you.

Enjoy the rest of summer. We look forward to seeing you in the fall and hearing from you anytime!

Jane

Where are you right now in your career?



Timely RegentAtlantic Insight

Investing Cash in the Long Run

One of the biggest challenges investors will face is the question of timing – "If I have a significant amount of cash, when is the best time to invest it?" To find more Insights on our website, [click here](#).

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 designed exclusively for women with 15-20+ years of experience and significant 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. Her mission is to show clients what's possible. 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.



Jane Newton, CFP®, MBA | Managing Partner and Wealth Advisor
212.202.2937 ext 236 | jnewton@regentatlantic.com
Connect to Jane on [LinkedIn](#)

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