



## Notes from Jane

Jane Newton CFP®, MBA  
Managing Partner and Wealth Advisor

**T**his year's Wall Street Women Forum on April 18th is our ninth annual forum, themed "**What's Possible...?**" I'm both thrilled and proud of what we've built as a community as we've pushed ourselves outside of our comfort zones to achieve more and be better. "What's possible?" is the question that so many Wall Street women raise with me. Living in an era where boundaries are being broken every day, we find ourselves facing (and embracing) change and opportunity. Women are increasingly taking ownership of their professional and personal lives; I've seen how powerful it is for each of us to be more nimble in a rapidly shifting environment and the liberation that comes from knowing you have options.

In April, our two awesome keynote speakers will share their perspectives and practical insights to help us see what's possible for ourselves. Read more about **Lisa M. Shalett** and **Ceci Kurzman** here: [2018 Forum Speakers](#). Lisa and Ceci will draw on their different backgrounds – Lisa on Wall Street and Ceci in the music industry – to reveal the techniques used to power their careers, craft their brands to reshape their roles, and stay ahead of the curve. Our break-out sessions will drill down further into two key areas you've told us you want help with: Crafting your Narrative and Navigating through Transitions. Our speakers will draw on their own lessons learned to translate concepts to tangible takeaways.

Why is the theme of *What's Possible?* so relevant today? While some high-level women on Wall Street are content with their jobs today, most of you are not. At last April's Forum, you shared that fully one-third of you are not where you want to be in your career. Another 20% of you are satisfied with where you are, but dissatisfied with your compensation. Our 2017 survey questions are here: [What's on Your Mind?](#)

[continued on page 5](#)

## A Conversation with Kelly Hoey

Kelly Hoey, who led a breakout session at the April 2017 Wall Street Women Forum, is a public speaker, consultant and angel investor. She is a former corporate lawyer, held roles in law-firm management and cofounded a business start-up accelerator. Kelly is now the author of "Build Your Dream Network" (2017).

[continued on next page](#)

## Winter 2018

### Ninth Annual RegentAtlantic Wall Street Women Forum

### What's Possible...?

April 18, 2018  
2:00 - 7:00pm  
New York City

By invitation only for  
high-level women on Wall Street

For more information, visit  
[wallstreetwomenforum.com](http://wallstreetwomenforum.com)

[Find out more about  
RegentAtlantic's  
upcoming events](#)



**Kelly Hoey, cont.**

In this interview, Wall Street Women Forum founder Jane Newton talked with Kelly about the value of networking, the power of social media and how professional women can successfully leverage these tools to advance their careers. Follow Kelly on LinkedIn.

*Jane Newton:* Kelly, you had a very successful legal career before you shifted gears to become a star start-up investor, speaker, blogger, writer and networker extraordinaire. Can you tell us whether there was a specific trigger that sparked you to leave the corporate world to go out on your own?

*Kelly Hoey:* I'd say the drivers were my age, experience and expanded professional network. Age and experience taught me that continually doing the same things just gets you more of the same work. It wasn't until I stepped out into a broader professional network that I realized I could use my skills quite differently.

*Jane:* What do you mean by "stepping outside of your network"?

*Kelly:* I was a practicing lawyer for 11 years. I then took a management job within the legal profession. While I needed to build a new network of people who did management work for leading law firms to land that role, my network was still narrow.

**"Is the network I have today the right one to get me where I want to go next?"**

It was when I took a role reinvigorating a law firm's alumni (former employees) program. In that job, I looked for inspiration from other people who had done similar marketing work. This time, I realized I needed to network with people outside the legal profession to get the best possible information.



*Kelly Hoey speaking at the 2017 Wall Street Women Forum*

That's when I got involved with the professional women's network, 85 Broads (now called Ellevest). When I stepped into that diverse, broader network and connected with members (asking questions, really networking in meaningful ways), everything changed for me.

### **What Do You Want to be Known For?**

*Jane:* You've said that you didn't set out to be a networker or connector, but that each of your career moves and opportunities has come about as a result of a connection. I'd say no one is a better professional connector than you. How did you draw on your own network to get where you are today?

*Kelly:* I realized that even for my first law job, which was very much an application process, my decisions about where to apply were based on personal connections and feedback from a few individuals.

**"What do you want to be known for?"**

I landed my second law job completely through my network and word-of-mouth referrals about my legal abilities. So I think it's important to always ask yourself: How are you connecting with people? How good are you at sharing your knowledge, skills, experiences and interests so people can send good opportunities to you?

*Jane:* We like to say, "It's not what you know; it's who you know." You go a step further. You say, "It's who you know and who knows what you know." It sounds like you're also saying don't expect someone else to connect the dots and see why you're the perfect person to step into a particular role. You need to lay it out clearly for them.

*Kelly:* Right! Think of it this way: What kind of work do you want people to find you for? For instance, I met a guy the other night at a professional event. He said he was a lawyer and he networks as a lawyer on LinkedIn. He also shares his work on Instagram as a photographer, and that's what he really wants to do. I said, "There's your problem. You're unclear. Do you want people to send you legal work or ask you to be their photographer?" You've got to network more clearly.

*Jane:* At one point, you were also the founder of a startup accelerator. How did that come about?

*Kelly:* As a result of expanding my network, Deborah Jackson and Veronika Sonsev, both amazing business leaders,

**Kelly Hoey, cont.**

had this idea for a startup accelerator, Women Innovate Mobile (WIM). Veronika and Deborah kept telling people they needed a third cofounder with a particular skill set. No matter whom they talked to about the idea, people would say, “You should talk to Kelly Hoey. Do you know Kelly Hoey? You should really talk to her.”

I think the lesson here is that you can join a club or be part of a network and sort of quietly sit there. Or you can roll up your sleeves and figure out ways to get involved and add value. I did the latter and I think that approach has a much bigger ripple effect. People see what you can do and start referring you for other opportunities.

**If You’ve Done it, Own it**

*Jane:* You’ve helped weave your own narrative. I think that is so critical when we are building our own brands. However, a lot of women cringe at that. Even the term “networking” makes some women uncomfortable.

*Kelly:* Well, let’s quote Muhammad Ali: “It’s not bragging if you can back it up.” If you’ve done it, own it. And if you can’t say it on your own behalf, say it on behalf of another woman. Say, “Jane, you’re being modest. You’ve had a really great year. These other people need to hear about it.”

*Jane:* Absolutely. I encourage women, when they feel they can’t toot their own horn, to have other people do it for them. We have to be able to say, “Kelly, I don’t want to talk about my great work, but if I tell you about it, can you share it?” I think we need to do that collectively.

**No BFFs**

*Jane:* I want to stay on this topic, because we talk a lot in the Wall Street Women Forum about the importance of sponsorship. As you know, a sponsor is the person who professionally

advocates for you, usually when you’re not even in the room. That’s yet another way to have someone toot your horn for you. Is sponsorship important to you?

*Kelly:* Yes and I look at sponsorship this way: I find that women blur the concepts of mentorship, sponsorship and personal relationships with sponsors. They’re not the same things. You may never have worked directly for or with your sponsor, but your work may have benefitted them somehow. Maybe you’ve improved their balance sheet. You’ve delivered something important in some way. That person may be willing to expend political capital on your behalf.



Take time to unpack how this sponsor noticed you and figure out their bottom-line motivation. Is there something else you’re doing that either they should know about or that will encourage them to advocate for you again?

Also, don’t assume you have to become a personal friend. I think too often women assume we have to morph our sponsorships into personal relationships. You don’t need to become their BFF. Women need to get more comfortable with what we often call “loose connections.”

**Will My Current Network Get Me Where I’m Going Next?**

*Jane:* I want to switch gears now to a

**“If you’ve done it, own it.”**

powerful message you shared at the 2017 Forum. You suggested we ask ourselves, “Is the network I have today the right one to get me where I want to go next?” Can you explain what you mean by that?

*Kelly:* That question was really important to me when I decided to stop practicing law and move into law firm management. I realized then that I didn’t have the professional connections to get me to where I wanted to go next.

It took me 18 months to build a different network and land the job I wanted. I built new professional relationships one person at a time. I figured out which conferences law firm managers went to, what they read and what issues were top of mind for them. I also went to the New York University School of Continuing Professional Studies for a certificate degree. The lesson: You can’t build a new network and skill set overnight. Establishing trust and building your (new) reputation takes time. Start building that network now.

**Solid Finances = More Career Flexibility**

*Kelly:* Another key and non-obvious networking tip is that I saved and invested my money. That meant I could take the financial hit of stepping out of a job to do a full-time job search and career transformation. Money is my third networking success pillar.

**Kelly Hoey, cont.**

I always say to people: 1) Build your expertise, 2) Build your network, and 3) Build your bank account.

*Jane:* You're speaking my language! I want women to have the flexibility to make their career and personal choices. However, too often what holds a woman back is that she doesn't have the financial wherewithal to get to that next step.

Just as you help people understand how to be very strategic about using your network to get where you're going, I encourage women to do the same with their finances. I want my clients to have options. In my work, I help you identify your financial goals and how to build your financial base from Point A to Point B. We show you "What's possible?"

## "Don't expect someone else to connect the dots."

**Social Media:  
Authenticity Matters**

*Jane:* Let's talk about social media, where you are clearly the maven. You use LinkedIn, Twitter and other platforms to connect with others and build your brand. What do the rest of us need to know?

*Kelly:* First, don't outsource it. People should know it's you they're talking to on social media. Your 18-year-old daughter or intern can't be your voice. For example, Cher. It's totally her voice on her social media accounts. Then there's Justin Trudeau, prime minister

of Canada. His social media accounts are clearly managed by his staff. However, every once in a while, I look at one of his messages and think, "Clearly, he crafted this one." People can tell the difference.

Next, use each platform differently. Think of LinkedIn as your office. Be professional and share work-related information. Facebook, at least for me, is where I connect with friends and family. Twitter is the cocktail party, where you can be witty and an interesting guest at the party.

Women should leverage the heck out of LinkedIn. I now have over 415,000 followers on the platform. It's much more powerful than people realize.

**Long-Term Connections Can Pay Off in Unexpected Ways**

*Jane:* Let's talk about your phenomenal book—"Build Your Dream Network"—my copy is all marked up and full of my notes. I tell other professional women that it's the essential guide to read in building their network.

*Kelly:* Thank you! And speaking of relationship-building and using social media—it all came together for me in the foreword to the paperback. Here's the story: In 2010, I started following Tom Peters on Twitter. Tom is the coauthor of "In Search of Excellence," a bestselling business book for more than 30 years.

I occasionally retweeted what he said, he started following me and we ended up having back-and-forth conversations, all through Twitter. One day Tom direct-messaged me that he had pre-ordered the hardcover version of my book. It was one of those, "Are you kidding me?" moments! Social media opens doors for us. Seriously, when would I ever be in a room with a leader like that?

Fast-forward to the paperback version,

## "Pay attention to how and when you do your best work."

which came out in January. Tom asked me who was writing the foreword to my book. I took a chance and said, "Tom, how much would I have to twist your arm to write it?" And he said yes! This was seven years after I started following him on Twitter.

*Jane:* It doesn't happen overnight. And you were very thoughtful and invested a lot of time and energy into that important relationship. It also sounds like social media can sort of help level the playing field in business.

*Kelly:* It really can. As women, we can bring our natural strengths of relationship-building to social media. We can also be found by all sorts of amazing people on social media because of our expertise, not because we're a Rockefeller or went to an Ivy League school.

Think of all the barriers that can be eliminated by women who bring their empathy, emotional intelligence and communication skills to social media and manage it well. We have amazing opportunities to really catapult our careers by networking on these platforms.

Social media is just one tool to build and leverage your network. It's a great way to get your story out there, the way you want to tell it. It's always about the 3P's —people, people, people. So put your best foot forward whether face-to-face or using social networks.

## Timely RegentAtlantic Insights

### Tax Cuts and Jobs Act

In December of 2017 one of the biggest tax overhauls (Tax Cuts and Jobs Act) of the past three decades was passed into law. Many will benefit from lower tax rates while others will face tax increases by the substantial loss of deductions. Read about planning opportunities that will become more valuable under this new tax regime.

### The Five Virtues of a Wise Investor

Chris Cordaro, RegentAtlantic Chief Investment Officer, shares his list of five important characteristics you may want to cultivate yourself, as well as look for in a wealth manager.

### 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.

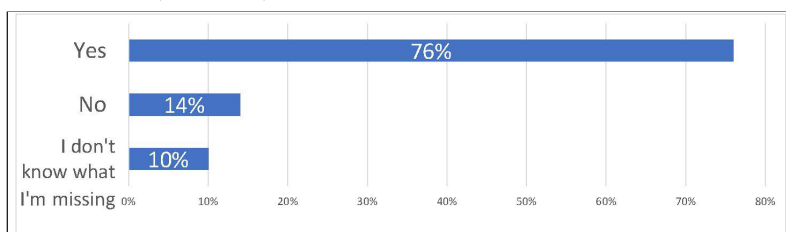
## Notes from Jane, continued from page 1

You're looking to identify and get to your dream job. You're hungry for advice from those who have created and embraced new opportunities. It's no coincidence that my own mission is to show my clients what's possible. I'm committed to enabling each of you to make significant career and personal decisions with confidence.

At last year's Forum, we were honored to hear from Kelly Hoey, the author of "Build Your Dream Network." Kelly is one of the best networkers I know (and a fabulous person, too!). Kelly shared with us her advice on how to network with intention. Many of you have since shared with me how valuable Kelly's practical approach has been in helping you move forward. In case you are wondering why we need help networking, let me share your responses to a question I posed at the Forum. I asked our participants "Does your current network need recharging to get you where you want to go next?" Your answer was a resounding "YES!" Accomplished women on Wall Street are sharing that they need to up their networking skills. Read my recent interview with Kelly for straightforward insights, advice and practical tools.

### **2017 Live Survey Results**

*What got you here won't get you there. Does your current network need recharging to get you where you want to go next?*



As always, I welcome hearing your stories of how the Forum has made a difference to you, and ideas for making it even more impactful. Our Forum community, now 800 strong, continues to grow by word of mouth. Looking forward to seeing you on April 18th!

Jane

## Wall Street Women Forum

### Exclusive Alliance with Julia Pimsleur

## Street Sisters: Connecting Wall Street Women and Female Entrepreneurs

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 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)

## In case you missed it...

Jane Newton appeared on the inaugural **Alpha Rising Podcast**.

[Click here](#) for the interview.

Below are photo highlights of the Fall events.



**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.

## 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?

### To Figure Out What's Possible for You, Contact Jane Newton

**jnewton@regentatlantic.com**  
**212.202.2937 ext 236**  
**www.wallstreetwomenforum.com**  
**www.regentatlantic.com**



**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](mailto:jnewton@regentatlantic.com)**  
**Connect to Jane on [LinkedIn](#)**

### [Subscribe to the Wall Street Women Forum Newsletter](#)

**Important Disclosure Information**

Please remember that different types of investments involve varying degrees of risk, including the loss of money invested. Past performance may not be indicative of future results. Therefore, it should not be assumed that future performance of any specific investment or investment strategy, including the investments or investment strategies recommended or undertaken by RegentAtlantic Capital, LLC ("RegentAtlantic") will be profitable. Please remember to contact RegentAtlantic if there are any changes in your personal or financial situation or investment objectives for the purpose of reviewing our previous recommendations and services, or if you wish to impose, add, or modify any reasonable restrictions to our investment management services. A copy of our current written disclosure statement discussing our advisory services and fees is available for your review upon request. This newsletter is not a substitute for personalized advice from RegentAtlantic. This newsletter is current only as of the date on which it was sent. The statements and opinions expressed are, however, subject to change without notice based on market and other conditions and may differ from opinions expressed in other businesses and activities of RegentAtlantic. Descriptions of RegentAtlantic's process and strategies are based on general practice and we may make exceptions in specific cases. Please remember that RegentAtlantic does not provide tax or legal advice. Please consult with a legal or tax professional prior to implementing any of the strategies discussed in this newsletter.