

LevelUP

A career and leadership development program supporting women to chart their path to a senior investment decision making role with greater clarity and confidence.

Future IM/Pact | A Yo&Co program



The technical skills and hard work that got you here won't get you there

It's time to level up

We know you aspire to a senior investment decision making role. Where all your hard work translates to greater autonomy, responsibility and impact, doing work you find stimulating, and earning great money along the way.

The challenge is, opportunities to move into these top roles are limited, take time to come to fruition and depend on senior people who might not yet see your potential - yet.

Plus, you're probably not getting getting clear feedback and/or don't have the time, tools and mentors to help you figure it out.

You need to feel confident in your career trajectory, backed by your leadership, supported by like-minded peers and inspired by role models who can show you how to craft a career and life you love.

You need

- ▶ To confirm you've got what it takes to be a senior investment decision maker, and what you need to do to get there.
- ▶ Feedback on your strengths and what's holding you back, delivered and coached in a way that's practical and direct.
- ▶ Tools to play your inner game so you can manage insecurities, think more clearly and become an exceptional communicator.
- ▶ Visibility with leadership and their commitment to invest in your growth
- ▶ A support network of like-minded women and inspiring male and female role models who can share what they've learned on the path to senior roles.



Informed by and designed for ambitious mid-career women in investments

In an ideal world, your work would speak for itself. The truth is, no one cares about your career as much as you do. *LeveUP* is here to put you in the driver's seat. Here's how.



Career clarity and confidence

Get crystal clear about who you want to be as an investment leader and how you're going to get there.



Self-belief and professional conviction

Know your strengths, tame your inner critic, back yourself, and enjoy your work and life more.



Improve your effectiveness, influence and impact at work

Determine what's getting in the way of you being the best investment leader you can be and how to realise your full potential.



Build a supportive and influential network

Strengthen your close contacts of peers, role models and mentors across the industry, and be part of a group that will tell it to you straight and cheer you on.



Leadership visibility and buy-in

Use your career clarity and growth plan to raise your visibility, and secure commitment from the people who matter.

"I was a little sceptical going into the program, but it has been way more impactful than I thought.

It might have taken me a few more years to make the learnings and have the realisations that I gained over the 4 months on this program."

2024 program participant

Don't take our word for it. Here's what our 2025 cohort has to say

“ LevelUP is unlike anything I've seen in finance. Grateful that this exists.

The course has helped me improve my confidence in speaking and channelling my thoughts better

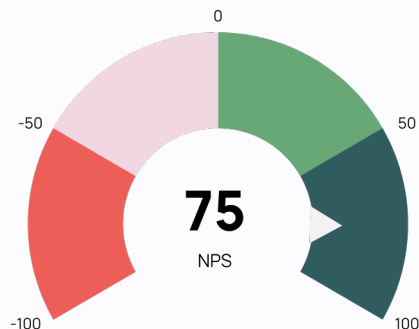
The opportunity to step out of the day to day combined with the leadership topics and insights Yolanda brought to the table created a great learning environment.

The program is beneficial if you want to explore your behaviours, why you respond in certain ways, and how you can challenge your current thinking to adapt and get the most out of your interactions and career.

Really unique with valuable insights and tools that no other development course offers

I would definitely recommend this program for future cohorts.

Exceptional net promoter score



50 = Excellent

80 = World class

100%

Agree or strongly agree

LevelUP equipped them with tools and insights that will **support my leadership and career progression**

Developed tools and insights that have **improved my effectiveness and impact at work.**

They have **greater insight into strengths and development areas**, and how I can work on these to continue to grow

Overall, this course was **worth their time**

A 4 month program providing tools, insights and connections that compound your growth for life

Focused on the inner game of investing, leadership and careers. Comprising in-person workshops and 1 on 1 coaching, plus peer learning and access to role models and mentors, with your employer's buy-in and input.

Kick-off and prep work

31 March, 10 -11 am

- ▶ Virtual call sharing key concepts and prep-work (45 mins)
- ▶ Nominated leader sponsoring participation briefed on process and their role

Follow up actions

- ▶ Enneagram profiling (40 mins) and 1:1 debrief (90 mins)

Workshop 1 and mentor dinner

7 May, 9-5 pm plus dinner

Full day in-person workshop on **mastering the inner game to achieve career and growth goals** followed by dinner with female investment leaders.

Follow up actions

- ▶ Check-in with sponsoring leader (45 mins)
- ▶ Feedback requests (30 mins)
- ▶ Career strategy self-reflections (2 hours)
- ▶ 1:1 coaching (50 mins)

Workshop 2 and mentor dinner

18 June, 9-5 pm plus dinner

Full day in-person workshop on **leadership purpose and career strategy** followed by dinner with female investment leaders.

Follow up actions

- ▶ 1:1 coaching (60 mins)
- ▶ Check-in with sponsoring leader (45 mins)
- ▶ Interview role model on their career strategy (45 mins)

Workshop 3 and mentor dinner

30 July, 9-5 pm plus dinner

Full day in-person workshop on **influencing stakeholders and impactful communication** followed by dinner with female investment leaders.

Follow up actions

- ▶ Check-in with sponsoring leader (45 mins)
- ▶ Ongoing peer and mentor connection

Access to role models and mentors

You need to see who you want to be. That's why we're creating a critical mass of amazing senior investors who can share the lessons that supported their success.

Role models and mentors attend 1 – 2 dinners and are available to mentor or share insights with at least one participant.

Mentoring will be based on chemistry, rather than structured matching, and will be flexible in format, as determined by connection and capacity. For example, some mentors will be available for one-on-one Q&As, others will be available for a longer-term relationship.

Whatever way you engage these incredible leaders, Future IM/Pact will support to make the most of the opportunity.

2025 mentors below. 2026 mentors confirmed shortly.

Bianca Rose - Senior Portfolio Manager, Morningstar

Katrina Khoupong - Portfolio Manager, Acadian Asset Management

Alison Chan - Investment Director – Sustainable Finance, Metrics

Kylie-Anne Richards, PhD - Head of Research, Future Fund

Li-Hsia Yap - Senior Portfolio Manager, Equity Index Group - Vanguard Investments Australia

Jared Pohl - Co-Founder, ECP Asset Management

Joanna Nash - Head of Portfolio Management and Senior Quantitative Portfolio Manager, RQI Investors

Rachel O'Connor - Senior Portfolio Manager, Rest

Shirley Bowles - Quoted Funds – Senior Manager, State Street

Genevieve Murray - Managing Director - Responsible Investment & Listed Equities at Future Fund

Anna Shelley - Chief Investment Officer, AMP

John Sevier - Chairman Ellerston Capital Advisory Board

Nick Griffin - Co-Founder and CIO, Munro Partners

Craig Evans - Managing Director, Flowgum Investments

See website for current and complete mentor list

“Reframe and embrace imposter syndrome as a sign you’re being challenged and working hard in a role that matters to you.”

Kate Howitt, 2024 program mentor

Designed for organisations committed to investing in their high potential women

Great leaders know they've worked hard to recruit talented women into their investment team, and now they need to keep them. Investing in their growth and development is key.

Designed for

High potential mid-level female investors with around 6-10 years' markets / investment experience.

You're likely to be senior analyst / associate to deputy PM / director, or may work in investment adjacent roles, eg investment specialists.

What's most important is that you:

- ▶ Are looking to take your career to the next level
- ▶ Have an appetite for growth
- ▶ Are committed to doing the inner work that will unleash your full potential at work and in life.

Female only program. Maximum 12 participants per program.

Participants receive

- ▶ Enneagram personality profiling report.
- ▶ 3 x in-person workshops with industry peers.
- ▶ 3 x networking dinners with senior investors acting as role models and mentors (through organic connection).
- ▶ 3 x 1 on 1 coaching (including 90 min Enneagram debrief and 2 x 60 mins).
- ▶ Workbooks and insight tools.
- ▶ Leadership buy-in for their participation, reinforced by monthly check-ins on progress.



Participant fees

\$5,900 plus GST

*Early bird pricing before
15 December is \$5,500 plus GST*

*10% additional discount for
Future IM/Pact partners*

Most employers will have a development budget that can fund external programs – either in full or in part.

Use this program information to secure your participation and let us know what else we can share to support your business case.

Created and facilitated by a leadership expert with extensive industry knowledge

We get you

We know what it's like to feel burning ambition laced with fear that you might not be good enough to crack into senior leadership. If having a family is on the agenda (or already happening), we get you're probably worried that being a mum will derail what you've worked so hard for.

I've been working in and around the funds management industry for over 20 years, and have spent the past five years helping women launch and build a fulfilling investments career, and a flourishing life.

That's how I know you need to invest in you. You need someone to help you reflect deeply on where you want to take the next decade of your career and life, and structure your thoughts

into a coherent plan, informed by clear and actionable feedback, and supported by the people who matter.

I will share tools that cultivate the deep self-awareness that's essential for your growth, and the self-belief you need to finally tame your inner-critic. All wrapped up in a learning experience shared with like-minded peers, and supported by inspiring role models and mentors who can provide fresh perspectives and make the journey way more fun.

Reach out if you want to talk through your context and how this program can support your growth.



**Reach out to find out more,
or to register**

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Find out more

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