

2025 Events: A Year in Review



Dear Colleagues:

As we wrap up this year and look ahead to an exciting 2026, I wanted to extend my heartfelt thanks for your continued support of the SIFM and wish you and your family a joyful and healthy holiday season!

Reflecting on the past year, I'm proud to say that together we made 2025 a success. Members and guests joined us for 11 events throughout the year and helped to strengthen the bonds of our community. See the sidebar for highlights of the **2025 Year in Review**.

Looking ahead, planning for 2026 is well underway with several new initiatives and events. The Strategy Committee, now the Growth & Governance Council, is focused on governance, membership, attendance and corporate outreach. The Council is seeking 6-8 volunteers for each of its pillars and will host a virtual meeting in January. Details on this initiative are attached; please reach out to me directly if you are interested in participating.

Highlights of upcoming events:

The **Women of SIFM Committee** is planning a series on Executive Presence to help both women and men develop the skills needed to inspire confidence, respect, and lead with authenticity and impact. The goal is to connect skills in leadership, communications, public speaking, appearance and behavior with attendees' leadership aspirations. Watch for details coming in January.

Springtime will bring a joint event with the **Women of SIFM** and the **Young Professionals**; hosted by Baker Tilly in Philadelphia. It will feature rising leaders sharing strategies for climbing the management ladder and providing practical tips for success. Stay tuned for details coming in February.

Our new **Associate Membership** for professionals under 30 with fewer than five years in the industry provides opportunities to connect with peers across companies and functions. Annual dues are discounted to only \$100 and quarterly conferences are also discounted to \$100 (excluding The Annual Conference). If you or a colleague are interested, please reach out to me.

Finally, I wanted to express my sincere gratitude for your continued participation this year. Through this, we exceeded our conference attendance goals and featured outstanding speakers on topics vital to our evolving industry. I encourage you to share your ideas for future speakers and topics that you believe will shape our industry.

On behalf of the Board of Directors and the President's Advisory Council, I wish you a happy holiday season and much success in 2026!

Warm regards,
Yelena La Forgia
President, SIFM

Find SIFM on Social Media!



2025 - 2026

SIFM Growth & Governance Council

As SIFM evolves to meet the demands of a dynamic industry, the **SIFM Growth & Governance Council** will champion the development and advancement of the organization by reinforcing governance, expanding membership, elevating event engagement, and deepening corporate partnerships – powered by our most valuable asset: **our community**.

Governance

It's critical that SIFM stays organized, accountable, and focused. This means setting clear expectations for Board and PAC members, defining responsibilities, and streamlining decision-making. By keeping programs and events aligned with SIFM's mission and ensuring our leaders and committees stay engaged, we'll build a stronger foundation to support membership growth, event attendance, and corporate outreach.

Council Pillars



Membership Growth

Growing the number of SIFM members is essential to ensuring a stable budget for future events & conferences, while also safeguarding the long-term sustainability of the organization. Higher membership not only strengthens financial stability but also amplifies the networking opportunities available, creating a deeper and more diverse community where connections, collaboration, and professional growth can thrive.

Event Attendance & Corporate Outreach

Growing the number of attendees at events & conferences is foundational for a successful program. Encouraging members to bring guests is key to exposing new audiences to SIFM. Simultaneously, strengthening corporate outreach initiatives will expand our visibility, attract strategic partners, and create opportunities for new firms & organizations to engage with SIFM and contribute meaningfully to its mission and community.



2025 Council Members

Name	Company
Baxter, Andrew	FTI Consulting
Cotillo, Alyssa	Grant Thornton
Paromchik, Julia	QBE
Rosenthal, Monica	PwC
Sheldon, Sarah	Lincoln Financial Group
Sommers, Russell	Baker Tilly

2025 - 2026 SIFM Growth & Governance Council

Pillar #1: Governance

The committee is responsible for ensuring SIFM's overall financial stability, monitoring the performance of all committees, establishing a clear organizational vision and strategic priorities, and providing guidance and actionable insights to support committee effectiveness.



Roles & Responsibilities

- Attend Governance Committee Meetings
- Contribute to discussions and take initiative in leading agreed-upon actions & projects.
- Advise SIFM Officers on prospective Board / PAC Members
- Make effort to attend most SIFM related conferences & other events (Women of SIFM, Young Professionals, etc.)



2026 Goals

- ✓ Enhance Engagement of Board and PAC Members and Committees
- ✓ Review and Update Board and PAC Service Guidelines
- ✓ Review and Update SIFM Constitution and Bylaws
- ✓ Manage and Oversee SIFM's Financial Health
- ✓ Align Programs and Events with SIFM Mission

2026 Pillar Members

- **Board / PAC Sponsor:**
SIFM Vice President [Russell Sommers, Baker Tilly]
- OPEN SPOT #1 *
- OPEN SPOT #2 *
- OPEN SPOT #3 *
- OPEN SPOT #4 *

* Membership to this sub-pillar is open to all SIFM members in good standing.

2025 - 2026 SIFM Growth & Governance Council

Pillar #2: Membership Growth

The committee is responsible for expanding and sustaining SIFM's membership base to ensure financial stability and long-term organizational success, while fostering a diverse and inclusive community that enhances networking, collaboration, and professional development.



Roles & Responsibilities

- Attend Membership Growth Committee Meetings
- Contribute to discussions and take initiative in leading agreed-upon actions and projects.
- Make effort to attend most SIFM related conferences and other events (Women of SIFM, Young Professionals, etc.)



2026 Goals

- ✓ Increase Membership Base by determined % (TBD)
- ✓ Develop a Strategic Membership Acquisition Plan
- ✓ Revisit and Enhance Member Value Proposition
- ✓ Improve Member Retention [Goal: 40% Retention of 1st Year Members]
- ✓ Leverage Events for Recruitment
- ✓ Increase Associate Membership Utilization

2026 Pillar Members

- **Board / PAC Sponsor:**
Julia Paromchik, QBE
- **Board / PAC Sponsor:**
Andrew Baxter, FTI Consulting
- OPEN SPOT #1 *
- OPEN SPOT #2 *
- OPEN SPOT #3 *

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2025 - 2026 SIFM Growth & Governance Council

Pillar #3: Event Attendance & Corporate Outreach

This committee is responsible for driving event and conference participation, promoting guest engagement to broaden SIFM's reach, and strengthening corporate partnerships to enhance visibility, attract strategic collaborators, and create opportunities for meaningful organizational engagement.



Roles & Responsibilities

- Attend Event Attendance & Corporate Outreach Committee Meetings
- Contribute to discussions and take initiative in leading agreed-upon actions and projects.
- Make effort to attend most SIFM related conferences and other events (Women of SIFM, Young Professionals, etc.)



2026 Goals

- ✓ Increase Event Attendance by determined % (TBD)
- ✓ Expand "Bring a Guest" Initiative
- ✓ Increase Guest → Member Conversion Rate
- ✓ Expand Corporate Outreach to Target Companies
- ✓ Diversify Event Offerings
- ✓ Enhance Event Marketing
- ✓ Measure Impact and Engagement

2026 Pillar Members

- **Board / PAC Sponsor:** TBD
- Alyssa Cotillo, Grant Thornton
- OPEN SPOT #1 *
- OPEN SPOT #2 *
- OPEN SPOT #3 *

* Membership to this sub-pillar is open to all SIFM members in good standing.