Six Steps to Create a Successful Women In Transition (WIT) Program

The "Women In Transition" program provides practical tools to help women of all ages, incomes, and financial circumstances make wise investment choices, increase their financial literacy, and improve their ability to identify and avoid investment scams and schemes. NASAA Investor Educators may customize WIT materials to implement educational programs for women in their own jurisdictions.

1. Find Your Audience

WIT is designed for women in financial transition — women who become responsible for managing money, often for the first time.

a. **First-time Employment**
b. **Marriage**
c. **Job Loss**
d. **Deployed Military Spouse**
e. **Career Re-entry**
f. **Separation or Divorce**
g. **Retirement**
h. **Health Crisis**
i. **Sudden Wealth (such as lottery winnings or inheritance)**

2. Identify Potential Partnerships

Find new, creative opportunities to help spread the WIT message. Think outside the box! Use Internet search engines to locate prospective partners — enter the key words "women's groups" followed by a city, state, or province. Create a contact list with organizational names, contact names, addresses, websites, and phone numbers.
→ ***Be sure to verify any organization you partner with is not involved in investment fraud/scams. Also be wary of the perception of endorsement of outside organizations.***

a. **Local chapters of national women's organizations** (e.g., League of Women Voters, National Association of Professional Mortgage Women)
b. **Local chapters of national volunteer/philanthropic groups** (e.g., Soroptimists International, Lions Clubs)
c. **Businesses and professionals offering services to women** (e.g., female-oriented workout centers, weight-loss groups, divorce attorneys)
d. **Local employment groups for occupations consisting primarily of women** (e.g., nurses, retail sales workers, and dental and pharmacy assistants)
e. **Local women's groups** (e.g., garden clubs, book clubs, social clubs, ladies' auxiliaries, parent/teacher groups, church groups, etc.)
f. **Local women's support groups** (e.g., job retraining programs, women's shelters, clinics and health groups, new mothers' groups, widows' groups, etc.)
g. **Colleges and universities, sororities, and alumni associations**

3. Contact the Potential Partners

a. **Customize the WIT outreach letter** (provided in the toolkit) with your personal and jurisdictional contact information.
b. **Follow up with personal calls or visits to the organizations.** Provide sample copies of WIT handouts and request presentation opportunities. To reduce start-up costs, you can schedule personal visits for when you are already on the road to conduct other investor education presentations.
c. **Be patient!** As with any new IE program, it can take time and persistence to cultivate new partnerships and get information out to new audiences. Ask to meet with groups that seem demographically appropriate for WIT but are unresponsive. Be open to feedback and ask how to improve WIT so that it would be of interest to their members.

4. Utilize the WIT Press Release

a. **Customize the WIT press release** (provided in the toolkit) to announce the creation of a new investor education program in your jurisdiction.
b. **Distribute to local and regional media.** Be sure to include neighborhood newsletters, local magazines, and other smaller media outlets with high female readership.

5. Prepare for WIT Presentations

a. **Publicize the WIT event.** Request that the partner organization advertises the event to its members and/or the public. Utilize the press release template to create an event-specific press release – this will help advertise the WIT event and attract an audience.
b. **Customize the WIT PowerPoint** (provided in the toolkit). Feel free to add additional topics/slides as presentation time allows. A public presentation rule-of-thumb is one slide per minute.
c. **Prepare your remarks.** You can utilize the script provided and/or develop your own. Be sure to include information specific to the needs of the audience — for example, new college graduates, recent widows, and women re-entering the workforce likely have different financial management interests and needs.
d. **Provide handouts.** As above, you may need to customize/augment the materials to meet the needs of a specific audience. Be sure to include your personal and jurisdictional contact information on the handouts.

6. Invite Evaluations from Partners and WIT Attendees

a. **Invite feedback from the audience.** Request comments to determine if the presentation and handouts met the needs of the audience.
b. **Invite feedback from partner organizations.** After a WIT event, contact the sponsor and request suggestions to improve future presentations. Also ask for recommendations for additional potential partnerships.