

Rich thinking – Winter update

Time flies when you're having fun! The 15th edition of *Rich Thinking*® will be released on International Women's Day – March 8, 2025. This year's 50+ interviews focused on getting men and women to talk about the smartest thing they have ever done...I can't wait to share their stories!

Some of my activities over the past six months:

- Kensington Capital Partners commissioned me to research and write *Women & Alts: A Global Perspective* – this was published in October. I interviewed 52 finance leaders across a variety of professions globally and discussed how to address the gender gap in the alts landscape, strategies to attract women into alts, as well as actionable advice for women interested in investing in alts!
- The Canadian Venture Capital and Private Equity Association published my associated [article](#) on the same topic.
- Advisor Analyst invited me to do a fun Women & Alts [podcast](#) with host Pierre Daillie.
- CFA Institute published two of my related articles: “[The Alternative Investment Gap: Marketing to Female Clients](#)” and “[HealthTech, Access and Financial Fluency: The Future of Women and Alts.](#)”
- In November I was thrilled to moderate a panel “[The Risks of Being Risk Averse](#)” at the L.A. Times Studios Inspirational Women 2024 Forum & Leadership Awards. Panelists [Amber Ortiz](#) (City National Bank), [Lara Shortz](#) (Michelman & Robinson LLP), and [Angela Sutherland](#) (Yumi) provided expert advice around how smart risks can lead to lasting success.
- Lastly, in December I presented for the first time to FEP U. Porto - Universidade de Porto students: 15 years of *Rich Thinking* research highlights.

Here is a sneak preview from my next *Rich Thinking* report:

“Everything you do costs you something whether it is a cost to your mind, your spirit, or your bank balance. The smartest thing I've ever done is allow myself to make choices and if it's not working, change them!”

What price do you pay for making the smartest choice? What a great topic to reflect on over the festive season.

Happy Winter to all!

Barbara



Season's Greetings from Barbara, Duncan and Grace

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UPDATE: WINTER 2024