

Rich thinking – Winter update



It's a wrap! A dozen years of *Rich Thinking*® interviews in the bag! The twelfth edition of *Rich Thinking* will be released on International Women's Day – March 8, 2022. This year's interviews focused on getting women to talk about how they make money...I can't wait to share the stories!

Some of my activities over the past six months:

- Jana Hlistova in London invited me back on The Purse Podcast to do an episode about “**Women and Risk**”. We covered women and money, women and ESG investing, and why women are risk aware versus risk averse.
- Pavel Jakovlev in Zurich asked me to discuss “**Global Trends: Women and Finance**” on The White Spaces Show. We talked about why there are so many myths about women and money, and the data around the emergence of female-led venture capital firms, female founders supporting female entrepreneurs, and female angel investors.
- Blair duQuesnay in New Orleans and I co-authored “**Female advisers: Five reasons why they are a better fit than ever**” for CFA Institute's Enterprising Investor. Blair speaks from the heart: “I am thrilled that female portfolio managers have dominated the ESG space. As more dollars flow to ESG strategies, total industry assets managed by women will finally rise with them. I am just as tired of reading the depressing statistics on female fund managers as I am of the stagnant number of female advisers. It's time to get the word out, the future of finance should be female.” The bottom line? We're having different client conversations in 2021... and female advisers are a better fit than ever.
- Kensington Capital Partners in Toronto invited me to speak on their “ESG & Private Equity panel” at their annual general meeting. We discussed how we are in a very powerful period of change in the world of investing. We've got brilliant new technologies, we are actively embracing diversity of thought, and we are all way more aware of ESG issues. All of these factors are positive in terms of ensuring better due diligence across the board and opening up more and more investment opportunities in private equity.
- Echelon Wealth Partners in Toronto commissioned me to author The **Canadian Entrepreneur Report** for the third year in a row and I interviewed 35 CEOs and Founders across Canada. My favorite research finding was that if we follow movement, Canadian entrepreneurs are making sustainability and diversity real: 40% of the entrepreneurs specifically mentioned being conscious of sustainability and/or diversity and actually embedding this in their company focus!

In exciting news, I have co-authored the 2022 *Rich Thinking* Quantitative Survey with Duncan Stewart, CFA. We surveyed over 2,000 women in five countries on whether they invest, how they invest, and what they're investing in. Watch for this survey in early January 2022!

Happy Winter to all!

Barbara

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from Barbara, Duncan, and Grace