

GEORGIA
SECRETARY OF STATE
BRAD RAFFENSPERGER



SHE LEADS

Women's Investment and Financial Empowerment

**empower
educate
encourage**



She Leads 2019

3 live events

Columbus
Tifton
Atlanta

51%
of all Georgia
residents
are women

40%
women save
40% less for
retirement
than men

48%
of women say they
are not “money
confident”

33%
of women report they
do not have the tools
to save for retirement

2019 Live Events



She Leads 2020

7 Teleconference Events

May 5th

Relief &
Resources for
Small Businesses
in GA

May 21st

Financial Scams: COVID &
Beyond
*(Partnered with the SEC, AARP & U.S.
Attorney for the Northern District)*

June 3rd

Making
Money
Moves

July 22nd

Financial Scams: COVID &
Beyond
(Millennial outreach)

July 29th

Restoring &
Building Up Your Small
Business
In GA

Sept 15th

Mission Readiness:
Helping Military Families Protect
Their
Finances From Coronavirus
Challenges

Oct 29th

Finding Funding:
How To Fund Your Business
During a Pandemic & Beyond

2020 Teleconferences Guest Speakers



Donna Lowry
Moderator for Teleconferences
Host of GBS's Lawmakers

May 5th



Mary Chapman
Director, Policy,
Training, & Outreach
State Purchasing
Division, DOAS



**Marguerite Pressley
Davis**
Business Financial
Strategist



Sam Taussig
Head of Policy,
Kabbage, Inc.

May 21st



Richard R. Best
Regional director
SEC Atlanta,
Regional Office



Noula Zaharis
Director, GA Secretary
of State Securities and
Charities Division



Byung J. "BJAY" Pak
U.S. Attorney
North District of GA



Lee Baker
State President
AARP Georgia

June 3rd



Shardea Ages
Partner and Wealth
Advisor
Greenwood Wealth
Management



Dawnita McCain
Managing Director –
Corporate Banking,
Regions Bank



Kristin Pugh
CFP®, Senior Wealth
Advisor
TrueWealth LLC

July 22nd



Richard R. Best
Regional director
SEC Atlanta,
Regional Office



Noula Zaharis
Director, GA Secretary
of State Securities and
Charities Division



Anna Burns
Regional Director
FTC Southeast Regional Office

2020 Teleconferences Guest Speakers



Donna Lowry
Moderator for Teleconferences
Host of GBS's Lawmakers

July 29th



Marguerite Pressley Davis
Business Financial Strategist



Holly Hastings
Director, KYC Retail Bank Leader Senior Vice President, Citibank, North America



Farah Allen
CEO & Founder of The Labz

September 15th



Kim Langford
Personal Finance Journalist



Tiffiney Graham
Licensed in Georgia & Alabama Realtor®



Shay Cook
Financial Readiness Manager - FINRA Investor Education Foundation



Tamara Hicks
Senior, Enrollment Counselor, Military and Adult Learners at Columbus State University

October 29th



Marguerite Pressley Davis
Business Financial Strategist



Alok Gupta
Managing Director, Co-Founder at Loki Equity Ventures



Nicholas Downey
Engineer, Founder CEO, Nead Wax, Inc.



Marie "Mayte" Peck
President of SheLends Consulting

2020 Teleconference Invites

May 5th

May 21st

June 3rd

July 22nd

SHE LEADS Presents
Relief & Resources for Small Businesses in Georgia

TUESDAY, MAY 5TH • TELECONFERENCE
11AM-12PM

MODERATOR
Donna Lowry
Host of GPB's Lawmakers
Donna Lowry is a seven-time Emmy award winner and veteran journalist. She currently hosts Lawmakers on GPB.

SPEAKERS

Marguerite Pressley Davis
Business Financial Strategist
Entrepreneur, investor, author, business strategist, and financial expert. Creator of "Your Profit Playbook", the leading online program to support small businesses through financial planning.

Mary Chapman
Director, Policy, Training & Outreach, State Purchasing Division, DOAS
Mrs. Chapman has more than 14 years experience in state government procurement policy, contract negotiations, program management and implementation of major projects.

Sam Taussig
Head of Policy, Kabbage Inc
Sam is responsible for Kabbage's interactions with state, federal, and foreign governments.

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2 @sheleadsga
3 https://bit.ly/2YrT6td

4 @SheLeadsGA
5 She Leads - Women's Investment and Financial Empowerment

Financial Scams COVID-19 and Beyond
A TELE-TOWN HALL

THURSDAY
May 21, 2020
6:20 - 7:20 p.m. EST

Moderated by **DONNA LOWRY**
Host of GPB's Lawmakers
Seven-time Emmy award winner and veteran journalist.

Join the U.S. Securities and Exchange Commission, the U.S. Attorney's Office for the Northern District of Georgia, the Office of the Georgia Secretary of State, and AARP Georgia for a tele-town hall.

Learn about potential scams during the COVID-19 pandemic and the most common tricks fraudsters use to scam your money.

EVENT IS FREE
Pre-Registration Required

- Register at <https://vekeo.com/georgiascstate/>
- See **EVENTS** listing
- Click **COVID-19 and Beyond** event
- Provides requested information
- Confirmation email will be sent
- System will call you on the day of the event using the phone number you provided

SPEAKERS

RICHARD B. BEST
Regional Director
SEC Atlanta
Regional Office

BYUNG J. "BJAY" PAK
U.S. Attorney
Northern District of Georgia

NOULA ZAHARIS
Director
Georgia Secretary of State
Securities and Charities
Division

LEE BAKER
State President
AARP Georgia

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REGISTER TODAY!
www.vekeo.com/georgiascstate

- 1 Click EVENTS listing, Making Money Moves
- 2 Provide requested information
- 3 Confirmation email will be sent
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Georgia Secretary of State BRAD RAFFENSPERGER

SHE LEADS

Making Money Moves:
A discussion about optimally managing your finances through banking, debt management and investment practices.

WEDNESDAY, JUNE 3 • TELE-TOWN HALL
11AM-12PM

Moderated by **Donna Lowry**
-Moderator-
Donna Lowry is a seven-time Emmy award winner and veteran journalist. She currently hosts Lawmakers on GPB.

SPEAKERS

Shardea M. Ages, CFP®
Partner and Wealth Advisor
Greenwood Wealth Management
Shardea's focus is on developing strategies and providing advice for individuals, their families and their businesses. She helps clients develop their short- and long-term financial objectives and adjust their strategy as the inevitable changes in life occur.

Dawnita McCain
Managing Director-Corporate Banking, Regions Bank
Dawnita McCain and her team of credit professionals are responsible for identifying and assessing business drivers to determine the enterprise value of some of Regions' largest corporate borrowers.

Kristin M. Pugh, CFP®
Senior Wealth Advisor
TrustWells, LLC
Kristin serves her clients with exceptional service centered around mindful, goal-oriented planning and strives to help them meet and exceed their goals. Kristin is a leader in the firm and has been instrumental in the creation of a world-class training program, career path progression plans, and a professional development program.

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- 2 Provide requested information
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Georgia Secretary of State BRAD RAFFENSPERGER

SHE LEADS

Avoiding Financial Scams COVID-19 and Beyond
A TELE-TOWN HALL

WEDNESDAY
July 22, 2020
6:00 - 7:00 p.m. EST

Moderated by **DONNA LOWRY**
Host of GPB's Lawmakers
Seven-time Emmy award winner and veteran journalist.

Join the U.S. Securities and Exchange Commission, the Office of the Georgia Secretary of State, and Federal Trade Commission for a tele-town hall.

Learn about potential scams during the COVID-19 pandemic and the most common tricks fraudsters use to scam your money.

EVENT IS FREE
Pre-Registration NOT Required

- Click **EVENT LINK**
- Provide requested information
- Click **Join Event**

Please email your questions in advance or during the event to: AROOutreach@sec.gov

SPEAKERS

RICHARD B. BEST
Regional Director
SEC Atlanta
Regional Office

NOULA ZAHARIS
Director
Georgia Secretary of State
Securities and Charities
Division

ANNA BURNS
Regional Director
FTC Southeast
Regional Office

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Teleconferences — Stat Reports

	May 5th <i>Relief & Resources for Small Business in GA</i>	May 21st <i>Financial Scams: COVID & Beyond</i>	June 3rd <i>Making Money Moves</i>
Attendees	1,644	5,215	442
Outbound calls	17,809	57,290	4,508
Picked up phone	4,048	16,194	1,328
Call success rate	62%	77%	91%
Best Response Poll Question	Do you feel like you received on today's teleconference helpful insight into financial tools and resources that you can leverage for your business? 92% Yes	No poll questions	Do you feel like you received helpful insight into how to better manage your finances? 70% Yes Do you have a clear understanding of where your money goes? 68% Yes

Teleconferences — Stat Reports

	July 29th <i>Rebuilding & Recovering Financially</i>	September 15th <i>Mission Readiness: Helping Military Families Protect Their Finances From Coronavirus Challenges</i>	October 29th <i>Financial Scams: COVID & Beyond</i>
Attendees	1,472	931	436
Outbound calls	1,381	10,104	4,431
Picked up phone	3,873	7,362	4,247
Call success rate	63%	74%	96%
Best Response Poll Question	<p>Do you feel like you received on today's teleconference helpful insight into strategies and resources that you can leverage for your business to help you financially recover during these times?</p> <p>96% Yes</p>	<p>Has the financial uncertainty over the past few months affected your family's plans for staying in or leaving the military?</p> <p>Yes 100%</p> <p>Did you learn about any new strategies or resources that can help your family in this program? Yes 82%</p>	<p>Has funding been a barrier for you in growing your small business? Yes 85%</p> <p>Did you find today's session helpful in identifying funding options for your small business and strategies on how to approach the fundraising process?</p> <p>Yes 98%</p>

She Leads 2021 Webinars

7 Webinars + planning for Sept & Nov
1 Live event in October-planning stages

FEB 10-

Funding Your Business: How To Get The Piece Of The Pie

FEB 25-

Building Wealth

APRIL 29-

Smart Money Moves

MAY 6-

A Financial Mindset: The Secret Sauce to Success

JUNE 24-

The Juggling Act: Managing Competing Financial Priorities

JULY 27-

Securing Capital: Navigating the Process

AUGUST 25-

Getting Back on Track: Rebuilding Your Personal Finances and Small Business Post Pandemic

2021 Webinar Guest Speakers



SHARYL SUTTON
Moderator



LISA HOPKINS
Moderator



DONNA LOWRY
Moderator for Teleconferences
Host of GBS's Lawmakers

February 10th

February 25th

April 29th

May 6th



Marguerite Pressley Davis
Business Financial Strategist



Cait Howerton,
MBA, AFC®, CFP®
Regional director
SEC Atlanta, Regional Office



Chloé A. Moore, CFP®
Founder, Financial Staples



Cait Howerton,
MBA, AFC®, CFP®
Regional director
SEC Atlanta, Regional Office



Nicholas Downey
Engineer, Founder CEO,
Nead Wax, Inc.



Nicholas Downey
Engineer, Founder
CEO, Nead Wax, Inc.



Alex Wilson,
CFP®, BFA™
Lead Financial Planner,
Facet Wealth



Ashish Mistry
Investor & Advisor,
BLH Ventures, Inc.



Marie Peck
President of SheLends
Consulting



Kristin Pugh CFP®, Senior
Wealth Advisor
TrueWealth LLC



Malik Lee, CFP®, CAP®,
APMA® Managing Principal
and Founder of Felton &
Peel Wealth Management



Dr. Juanita Warren, AFC®
Financial Coach,
SmartPath, Financial
Counselor, Zeiders
Enterprises



Anita Davis
President and Chief
Funding Matchmaker,
Praxis Strategic Solutions

2021 Webinar Guest Speakers



DONNA LOWRY
Moderator for Teleconferences
Host of GBS's Lawmakers

June



Shardea M. Ages, CFP®
Partner, Wealth Advisor



Serina Shyu, AIF®, CFP®
Board Member for the Financial
Planning Association of
Georgia



Kamila Elliott, MBA, CFP®
President of GRID 202
Partners

July



**Marguerite Pressley
Davis**
Founder & CEO, Finance
Savvy CEO™ and creator
of Your Profit Playbook™



Kaseem Ladipo
Principal of The KAL
Firm



Marie Peck
President of SheLends
Consulting

August 25



Shardea M. Ages, CFP®
Partner, Wealth Advisor



Clinton Ages
Implementation Coach and
Change Management
Practitioner



Kristin Pugh CFP®,
Private Wealth Manager,
Creative Planning
President, Financial Planning
Association of Georgia

2021 Webinar

GEORGIA SECRETARY OF STATE BRAD RAFFENSPERGER

YOU ARE INVITED TO A LIVE WEBINAR

Funding Your Business: How To Get The Piece Of The Pie

WEDNESDAY, FEBRUARY 10 • 6PM-7PM

SHE LEADS

Sharyl Sutton
Moderator

Sharyl Sutton works as a Voter Education Coordinator for the Georgia Office of Secretary of State. Previously, she worked for broadcast network affiliates in several states across the country as a News Anchor, Political Reporter and Newscast Producer.

Marguerite Pressley Davis
Guest Speaker
Business Financial Strategist

Entrepreneur, investor, author, business strategist, and financial expert. Creator of Your Profit Playbook®, the leading online program to support small businesses through financial planning.

Nicholas Downey
Guest Speaker
Engineer, Founder CEO, Nead Werx, Inc.

Nickolas (Nick) Downey is founder and CEO of MerchLogix, Inc., an Atlanta-based software company. Nick graduated from the Georgia Institute of Technology in 2002 with a BS in Electrical and Computer Engineering. Nick is a former member of the Atlanta Technology Angels and sits on the Board of Directors of several Atlanta organizations. Nick has served as a coach for the Georgia Tech Business Plan competition, and the Startup Runway Foundation.

Maria "Mayte" Peck
Guest Speaker
President of SheLeads Consulting

Maria was born in New York City and raised in Peru. Only ten years after arriving in Georgia, Maria opened Sweet Devil Moon Tapas Bar - meeting the financial challenges of running and managing a 1 Million-dollar yearly budget for six years. Later she joined Access to Capital for Entrepreneurs a non-profit lender as Small Business Loan Officer. Furthermore, she is the Principal Managing Partner at Mark of the Potter a 51-year-old family business and serves as the Board Chair for the Latino Community Fund of Georgia.

REGISTER FREE TODAY!

www.vekeo.com/georgiasecstate

- Click EVENTS listing "Funding Your Business" on FEBRUARY 10
- Provide requested information
- Confirmation email will be sent
- You will receive a pre-call event reminder the day prior using the phone number you provided
- System will call you on the day of the event
- If you have a question for one of the speakers during the webinar, you can call 877-229-8493 using the PIN 119505

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REGISTER NOW FOR OUR NEXT FREE WEBINAR ON FEB 25TH

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"As a small business owner myself, I understand the economic turmoil that COVID-19 has brought upon Georgia."

- Brad Raffensperger

GEORGIA SECRETARY OF STATE BRAD RAFFENSPERGER

YOU ARE INVITED TO A LIVE WEBINAR

WEDNESDAY, FEBRUARY 10 • 6PM-7PM

Funding Your Business: How To Get The Piece Of The Pie

SHE LEADS

SHARYL SUTTON
Moderator

MARGUERITE PRESSLEY DAVIS
Guest Speaker
Business Financial Strategist

NICHOLAS DOWNEY
Guest Speaker
Engineer, Founder CEO, Nead Werx, Inc.

MARIA "MAYTE" PECK
Guest Speaker
President of SheLeads Consulting

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GEORGIA SECRETARY OF STATE BRAD RAFFENSPERGER

SHE LEADS

"Being financially intentional is critical to accomplishing competing financial goals. Executing a disciplined and strategic financial plan is key to getting it all done."

Shardea M. Ages, CFP®
Guest Speaker
Partner, Wealth Advisor

The Juggling Act: Managing Competing Financial Priorities

Thursday, June 24 • 6-7PM
Live Webinar

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2021 Webinar

GEORGIA SECRETARY OF STATE BRAD RAFFENSPERGER

SHE LEADS

YOU ARE INVITED TO A LIVE WEBINAR

Building Wealth

THURSDAY, FEBRUARY 25 • 6PM-7PM

Lisa Hopkins, Moderator
Ms. Hopkins is the current President of the North American Securities Administrators Association. Previously she served as chair of NASAA's Corporation Finance Section and has served on NASAA's Investment Adviser Section Committee as well as the Finance and Audit, Member Services, and Investment Adviser Continuing Education Committees.

Chloé A. Moore, CFP®
Guest Speaker
Founder, Financial Staples
Chloe Moore, CFP®, is the Founder of Financial Staples, a virtual, fee-only financial planning firm based in Atlanta, GA and serving clients nationwide. Her firm is dedicated to serving tech employees who are entrepreneurial-minded, philanthropic, and purpose driven. Chloe believes that money is an emotional topic and it impacts many aspects of our lives. She enjoys helping clients unpack their money history and discover how they can use money to support a life that is most meaningful to them.

Cait Howerton, MBA, AFC®, CFP®
Guest Speaker
Lead Planner, Facet Wealth
Cait Howerton, MBA, AFC®, CFP® is a Lead Financial Planner, a CERTIFIED FINANCIAL PLANNER™ (CFP) Professional, and an Accredited Financial Counselor®. She believes that all people should have access to equitable, objective, and conflict-free financial advice; it is her personal mission to make sure that financial planning is for all, not just for the few.

Malik Lee, CFP®, CAP®, APMA®
Guest Speaker
Managing Principal and Founder of Felton & Peel Wealth Management
Malik S. Lee is a financial expert with nearly two decades of experience and is the Managing Principal and Founder of Felton & Peel Wealth Management. A full-service, comprehensive wealth management firm serving clients nationwide with offices in both Atlanta and New York. Malik graduated with a degree in Finance from Morehouse College and is a CERTIFIED FINANCIAL PLANNER™, Chartered Advisor in Philanthropy®, and an Accredited Portfolio Management Advisor™.

Kristin Pugh, CFP®
Guest Speaker
Private Wealth Manager, Creative Planning
Kristin Pugh, CFP® serves as a Private Wealth Manager, working directly with her clients to create and maximize a customized financial plan addressing all aspects of a healthy financial life including investments, tax planning, risk management, retirement and employee benefits and estate planning. Kristin brings to her clients more than 14 years of experience in the financial services industry. Prior to joining Creative Planning, she worked for an independent investment advisory firms as a Senior Wealth Advisor.

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- Click EVENTS listing "Building Wealth" on FEBRUARY 25
- Provide requested information
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<https://bit.ly/3d9yAoC> She Leads @sheleadsga @SheLeadsGA

"The American experiment is about giving everyone the opportunity to succeed and providing Georgians with the right tools and information to benefit from the state's strong economy is a great way to do that."

- Brad Raffensperger

REGISTER FREE NOW
LIVE WEBINAR
THURSDAY, FEBRUARY 25 • 6PM-7PM

GEORGIA SECRETARY OF STATE BRAD RAFFENSPERGER

Building Wealth

SHE LEADS

DON'T FORGET TO REGISTER TODAY!

GEORGIA SECRETARY OF STATE BRAD RAFFENSPERGER

SHE LEADS

"Building wealth is a marathon, not a sprint."
Chloé A. Moore, CFP®, Founder of Financial Staples

LIVE WEBINAR
THURSDAY, FEBRUARY 25 • 6PM-7PM

Building Wealth

2021 Webinar

YOU ARE INVITED TO A LIVE WEBINAR HOSTED BY
 GEORGIA SECRETARY OF STATE BRAD RAFFENSPERGER **SHE LEADS**

Smart Money Moves
 Side Hustles, Small Businesses, and Investing
 [Gen Z and Millennial Edition]
 THURSDAY, APRIL 29 • 6PM-7PM

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- Click EVENTS listing "Smart Money Moves" on APRIL 29
- Provide requested information
- Confirmation email will be sent
- You will receive a pre-call event reminder the day prior using the phone number you provided
- System will call you on the day of the event
- If you have a question for one of the speakers during the webinar, you can call 877-229-8493 using the PIN 119505

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 @SheLeadsGA

Donna Lowry
 Moderator
 Donna Lowry is a seven-time Emmy award winner and veteran journalist. She currently hosts Lawmakers on GPB.

Cait Howerton, MBA, AFC®, CFP®
 Guest Speaker
Lead Financial Planner, Facet Wealth
 Cait is a CERTIFIED FINANCIAL PLANNER™, Professional, Accredited Financial Counselor®, and Lead Financial Planner at Facet Wealth. She is a Student Loan Expert and her ideal niches include the X & Y Generations, LGBTQ+ individuals, and progressive and unconventional professionals. Cait believes that all people should have access to equitable, objective, and conflict-free financial advice. It is her personal mission to make sure that financial planning is for all, not just for the few.

Alex Wilson, CFP®, BFA™
 Guest Speaker
Lead Financial Planner, Facet Wealth
 Alex is a CERTIFIED FINANCIAL PLANNER™ (CFP®) professional, a BEHAVIORAL FINANCIAL ADVISOR™ who is passionate about helping others define their true values and goals, and adapt their finances to create alignment, regardless of their net worth. Her unique career path includes experience in wealth management at Raymond James, launching two financial coaching businesses, working in the FinTech space at Atlanta-based start-up SmartPath where she focused on providing Financial Wellness as an employer benefit, and currently as a Lead Financial Planner at Facet Wealth where she serves Main Street America.

Dr. Juanita Warren, AFC®
 Guest Speaker
Financial Coach, SmartPath, Financial Counselor, Zelders Enterprises
 Dr. Juanita Warren is an Accredited Financial Counselor (AFC®) and virtual financial coach dedicated to meeting individuals and families where they are, helping them establish a strong financial foundation, navigate their financial goals, and experience lasting financial well-being.

"Every generation has the capacity to influence the economy. As a generation carrying new personal financial responsibility, it is critically important for Gen Z'ers and Millennials to be on a path toward financial security."

- Brad Raffensperger.

GEORGIA SECRETARY OF STATE BRAD RAFFENSPERGER **SHE LEADS**

Smart Money Moves
 Side Hustles, Small Businesses, and Investing
 [Gen Z and Millennial Edition]
 FREE LIVESTREAM WEBINAR • THURSDAY, APRIL 29 • 6PM-7PM

REGISTER TODAY

GEORGIA SECRETARY OF STATE BRAD RAFFENSPERGER **SHE LEADS**

85% ATTENDEES HAVE SECOND JOB OR A SIDE HUSTLE

82% ATTENDEES DO NOT KNOW HOW TO FIND FUNDING FOR THEIR NEW SMALL BUSINESS

89% ATTENDEES AGREED THEY RECEIVED HELPFUL INSIGHT INTO HOW TO BETTER MANAGE THEIR FINANCES?

2021 Webinar

YOU ARE INVITED TO A LIVE WEBINAR
HOSTED BY

GEORGIA SECRETARY OF STATE BRAD RAFFENSPERGER **SHE LEADS**

A Financial Mindset: The Secret Sauce to Success

THURSDAY, MAY 6 • 6PM-7PM



Donna Lowry
Moderator
Donna Lowry is a seven-time Emmy award winner and veteran journalist. She currently hosts Lawmakers on GPB.

Nicholas Downey
*Guest Speaker
Engineer, Founder CEO, Nead Werx, Inc.*
Nicholas (Nick) Downey is founder and CEO of MerchLogix, Inc., an Atlanta-based software company. Nick graduated from the Georgia Institute of Technology in 2002 with a BS in Electrical and Computer Engineering. Nick is a former member of the Atlanta Technology Angels and sits on the Board of Directors of several Atlanta organizations. Nick has served as a coach for the Georgia Tech Business Plan competition, and the Startup Runway Foundation.

Ashish Mistry
*Guest Speaker
Investor & Advisor, BLH Ventures, Inc.*
Ashish Mistry functions as an investor and adviser to young companies. His operating experience includes leadership roles with high-growth companies within Information Security, SaaS, and E-commerce. Furthermore, Ashish is the former CEO of KontrolFreek – an innovative lifestyle brand in the video game market.

Anita Davis
*Guest Speaker
President and Chief Funding Matchmaker,
Praxis Strategic Solutions*
Anita Davis' credentials include a certificate in Women's Business Entrepreneurship from Cornell University, the Women Business Enterprise Certification (WBE), and the Women Owned Small Business Certification (WOSB). Her 20-year tenure as a Vice President and loan officer with SunTrust, BB&T, and Chase Banks equipped her with broad and deep commercial lending expertise. Currently, Anita leads Praxis Strategic Solutions and specializes in navigating the funding process which drives clients to the loan closing table. Clients acquire the capital needed to implement their business expansion goals. Over the years, Anita has successfully helped clients acquire millions of dollars in capital that becomes the catalyst and fuel for small business growth.

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- Click EVENTS listing "A Financial Mindset" on MAY 6
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“The most critical foundation piece to being able to achieve your small business goals requires having the right mindset. It requires more than a step-by-step guide to meet your goals.”

- Brad Raffensperger

GEORGIA SECRETARY OF STATE BRAD RAFFENSPERGER **SHE LEADS**

A FINANCIAL MINDSET: The Secret Sauce To Success

JOIN US FOR A FREE LIVESTREAM WEBINAR
THURSDAY, MAY 6TH
6PM-7PM

REGISTER FREE TODAY



GEORGIA SECRETARY OF STATE BRAD RAFFENSPERGER **SHE LEADS**

“The consistent application of positive financial behaviors is how you build a fortified financial future.”

Anita Davis
*Guest Speaker
President & Chief Funding Matchmaker,
Praxis Strategic Solutions*

REGISTER TODAY!

A FINANCIAL MINDSET:
THE SECRET SAUCE TO SUCCESS
THURSDAY, MAY 6TH • 6PM-7PM
LIVE WEBINAR



2021 Webinar



HOSTED BY GEORGIA SECRETARY OF STATE BRAD RAFFENSPERGER SHE LEADS



Donna Lowry
Moderator

Donna Lowry is a seven-time Emmy award winner and veteran journalist. She currently hosts Lawmakers on GPE.



Shardea M. Ages, CFP®
Guest Speaker
Partner, Wealth Advisor

Shardea has been in the financial services industry since 2008. Graduating during the Great Recession, Shardea was determined to follow her passion. Her experience in banking, investment, management and insurance prepared her for her role with Greenwood Wealth Management. Shardea believes that everyone deserves access to prudent financial advice; she meets her clients where they are today and helps them get to where they want to be tomorrow.



Serina Shyu, AIF®, CFP®
Guest Speaker
Board Member for the Financial Planning Association of Georgia

Serina is passionate about helping members use their financial resources to build a great life. She believes in the importance of individuals and families rooting dreams and aspirations in a strong understanding of their financial situation. Serina takes a genuine, personal approach to financial planning focused on empowering members to align their financial assets with their values and goals.



Kamila Elliott, MBA, CFP®
Guest Speaker
President of GRID 202 Partners

Kamila is the President of GRID 202 Partners, a financial planning firm with locations in Washington DC, Georgia, and North Carolina. She has nearly two decades of financial planning and investment experience assisting high net worth individuals, endowments & foundations and business owners with comprehensive wealth solutions and holistic planning.

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- Click EVENTS listing "The Juggling Act" on June 24
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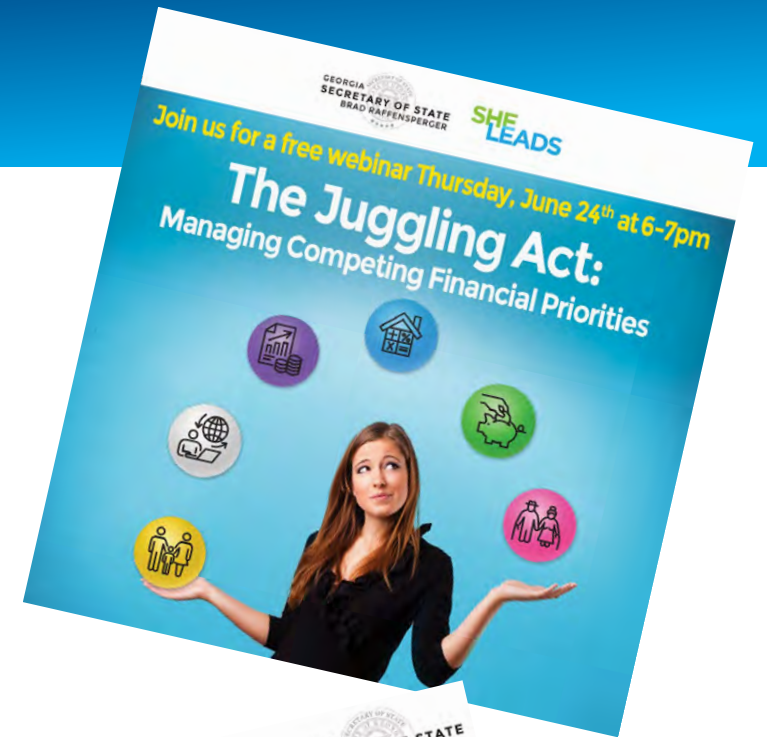
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"I am happy to give Georgians guidance on how to balance the competing financial priorities in their lives."

- Brad Raffensperger



2021 Webinar



Securing Capital: Navigating the Process

LIVE WEBINAR
TUESDAY, JULY 27 • 6-7PM

HOSTED BY
GEORGIA SECRETARY OF STATE
BRAD RAFFENSPERGER
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Donna Lowry
Moderator
Award-winning Journalist

Donna Lowry is an award-winning journalist who combines a passion for storytelling with a desire to empower others with the communication and critical thinking skills surrounding political, educational, and financial issues. Through her firm, Donna Lowry Communications, she provides consulting, writing, and producing services for educational, media, professional, and business outlets. Donna is the host of Lawmakers on Georgia Public Broadcasting. >>Read full bio



Marguerite Pressley Davis
Guest Speaker
Founder & CEO, Finance Savvy CEO™ and creator of Your Profit Playbook™

Marguerite, a former Wall Street financial analyst, business strategist, and top ranked business money expert, named Atlanta's 40 Under 40 by Atlanta Business Chronicle, co-authored "Girl Power Uncensored" with her chapter "From Wall Street To Helping Main Street", is an accredited angel investor, host of the podcast "Finance Savvy CEO", the creator of "Your Profit Playbook" - the leading business financial planning training program for small business owners, and Founder & CEO of financesavvyceo.com. >>Read full bio



Kaseem Ladipo
Guest Speaker
Principal of The KAL Firm

Kaseem Ladipo is Principal for The KAL Firm, an advisory firm specializing in social impact solutions for clients that include nonprofits, foundations, corporate social responsibility departments, and philanthropists - all looking to make their mark in the world. The KAL Firm's services include strategy development, executive coaching, fundraising, and board development. Kaseem has an extensive background in non-profit leadership, having led three non-profit organizations and held several board positions in his career. >>Read full bio



Maria "Mayte" Peck
Guest Speaker
President of SheLeads Consulting

Maria was born in New York City and raised in Peru. Only ten years after arriving in Georgia, Maria opened Sweet Devil Moon Tapas Bar - meeting the financial challenges of running and managing a 1 Million-dollar yearly budget for six years. Later she joined Access to Capital for Entrepreneurs a non-profit lender as Small Business Loan Officer. Furthermore, she is the Principal Managing Partner at Mark of the Potter a 51-year-old family business and serves as the Board Chair for the Latino Community Fund of Georgia. >>Read full bio

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- Click EVENTS listing "Securing Capital" on July 27
- Provide requested information
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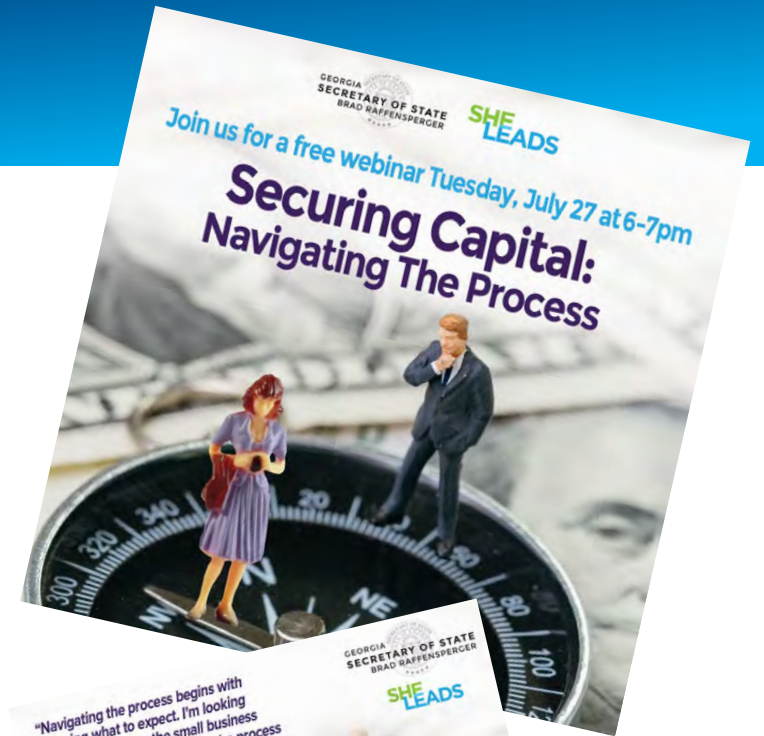


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"As small business owner, I know how important accessing capital is to a company's success."

- Brad Raffensperger



2021 Webinar



LIVE WEBINAR WEDNESDAY, AUGUST 25 • 6-7PM

HOSTED BY SECRETARY OF STATE BRAD RAFFENSBERGER SHE LEADS



Donna Lowry
Moderator
Award-winning Journalist

Donna Lowry is an award-winning journalist who combines a passion for storytelling with a desire to empower others with the communication and critical thinking skills surrounding political, educational, and financial issues. Through her firm, Donna Lowry Communications, she provides consulting, writing, and producing services for educational, media, professional, and business outlets. Donna is the host of Lawmakers on Georgia Public Broadcasting. >>>Read full bio



Shardea M. Ages, CFP®
Guest Speaker
Partner, Wealth Advisor

Shardea has been in the financial services industry since 2008. Graduating during the Great Recession, Shardea was determined to follow her passion. Her experience in banking, investment management and insurance prepared her for her role with Greenwood Wealth Management. Shardea believes that everyone deserves access to prudent financial advice; she meets her clients where they are today and helps them get to where they want to be tomorrow. >>>Read full bio



Clinton Ages
Guest Speaker
Implementation Coach and Change Management Practitioner

Coach Clinton Ages is an executive coach and change management practitioner with years of experience enhancing the performance of individuals, executives, teams and organizations. His background encompasses a wide range of programs and initiatives for goal setting, individual development, team building, organizational design, and facilitation; helping individuals and teams across a wide variety of functions and industries build the skills required to positively impact performance. His purpose is helping people create meaning in their own lives and in their organizations, which results in motivated employees, customer commitment and bottom-line performance. >>>Read full bio



Kristin M. Pugh, CFP®
Guest Speaker
Private Wealth Manager, Creative Planning President, Financial Planning Association of Georgia

Kristin Pugh, CFP®, serves as a Private Wealth Manager, working directly with her clients to create and maximize a customized financial plan addressing all aspects of a healthy financial life including investments, tax planning, risk management, retirement and employee benefits and estate planning. Kristin brings to her clients more than 15 years of experience in the financial services industry. Prior to joining Creative Planning, she worked for an independent investment advisory firms as a Senior Wealth Advisor. >>>Read full bio

Register free today!

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- Click EVENTS listing "Getting Back on Track" on August 25
- Provide requested information
- Confirmation email will be sent
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“Covid-19 has been a time of financial stress but I want Georgians to know that I am here for them. I am happy to provide Georgians with the tools and resources to keep their finances on track despite the economic challenges brought on by the pandemic.”

- Brad Raffensperger



Webinars — Stat Reports

	February 10th <i>Funding Your Business</i>	February 25th <i>Building Wealth</i>	April 29th <i>Smart Money Moves</i>
Attendees	649	546	536
Outbound calls	3,367	3,544	4,061
Picked up phone	3,314	3,461	3,753
Call success rate	90%	92%	92%
Best Response Poll Question	<p>Did you find today's session helpful in better understanding your options to getting capital for your business and strategies to use to help you secure it?</p> <p>Yes 100%</p>	<p>Did you find today's session helpful in understanding how you can better manage your finances?</p> <p>Yes 98%</p>	<p>If you have a business, would you know how to get funding for it?</p> <p>No 82%</p> <p>Do you feel like you received helpful insight into how to better manage your finances?</p> <p>Yes 89%</p>

Webinars — Stat Reports

	May 6th <i>A Financial Mindset: The Secret Sauce to Success</i>	June 24th <i>Building Wealth</i>	July 27th <i>Securing Capital: Navigating the Process</i>
Attendees	434	416	574
Outbound calls	4,145	4,199	4,341
Picked up phone	3,816	3,853	3,888
Call success rate	92%	92%	92%
Best Response Poll Question	After tonight's webinar, do you feel you have a better understanding of what "financial mindset" is for your business success? Yes 100%	Do you feel like you received helpful insight how to manage your competing financial priorities? Yes 100%	Has securing enough capital for your business been a hurdle for you in growing your business? Yes 88% Have you found today's session helpful in helping you understand what to expect from the funding raising process, how to prepare, and potential resources to explore? Yes 97%

INVEST GEORGIA EXEMPTION Fair



GEORGIA SECRETARY OF STATE
BRAD RAFFENSBERGER

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INVEST GEORGIA EXEMPTION Fair

Learn, Invest, Grow

Join Secretary of State Brad Raffensperger, successful entrepreneurs, incubators, and Georgia business groups to see some of Georgia's growing IGE businesses. Learn how you could be the next entrepreneur to take advantage of this special investment tool.

THURSDAY, AUGUST 26
10AM-12PM
GEORGIA STATE CAPITOL
RSVP TO [INVESTGA.EVENTBRITE.COM](https://investga.eventbrite.com)

The poster features a background image of a hand holding a glowing digital screen displaying a bar chart and a line graph with an upward-trending arrow. The chart has several bars of varying heights and a white line graph with a green arrow pointing upwards.

Event Channel & Streaming

[SheLeads event channel](#)

- Register for channel
- Register for events
- Listen to past events

The screenshot shows the Vekeo website for the Georgia Secretary of State. At the top right, there is a 'SIGN UP' button. The main header reads 'Georgia Secretary of State' with the tagline 'Empower. Educate. Encourage.' Below this, a paragraph describes the Secretary's mission. A 'TWEET SHARE EMAIL' bar is visible. The 'EVENTS' section lists three events: 'Making Money Moves' (June 3, 2020), 'Financial Scams | Covid-19 and Beyond' (May 21, 2020), and 'Relief & Resources for Small Businesses in Georgia' (May 5, 2020). The 'LINKS' section includes 'SheLeads Facebook', 'SheLeads Twitter', and 'SheLeads Instagram'. The footer contains 'Contact Us', 'Terms of Use', 'Privacy Policy', and '© 2020 Broadnet Teleservices LLC'.

<https://vekeo.com/georgiasecstate>

[SheLeads streaming web page](#)

- Live audio streaming on SOS/She Leads website & SheLeads Facebook page

The collage features three promotional graphics. The top graphic is for a 'RELIEF & RESOURCES FOR SMALL BUSINESSES IN GEORGIA - LIVE STREAMING TELECONFERENCE'. The middle graphic is for 'Making Money Moves: A discussion about optimally managing your finances through banking, debt management and investment practices. TELE-TOWN HALL WEDNESDAY, JUNE 3 11:00 AM - 12:00PM'. The bottom graphic is for 'Financial Scams | Covid-19 and Beyond A TELE-TOWN HALL Thursday, May 21 • 6:20pm - 7:20pm'. The graphics include the SheLeads logo and the Georgia Secretary of State logo.

Social Media Presence



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