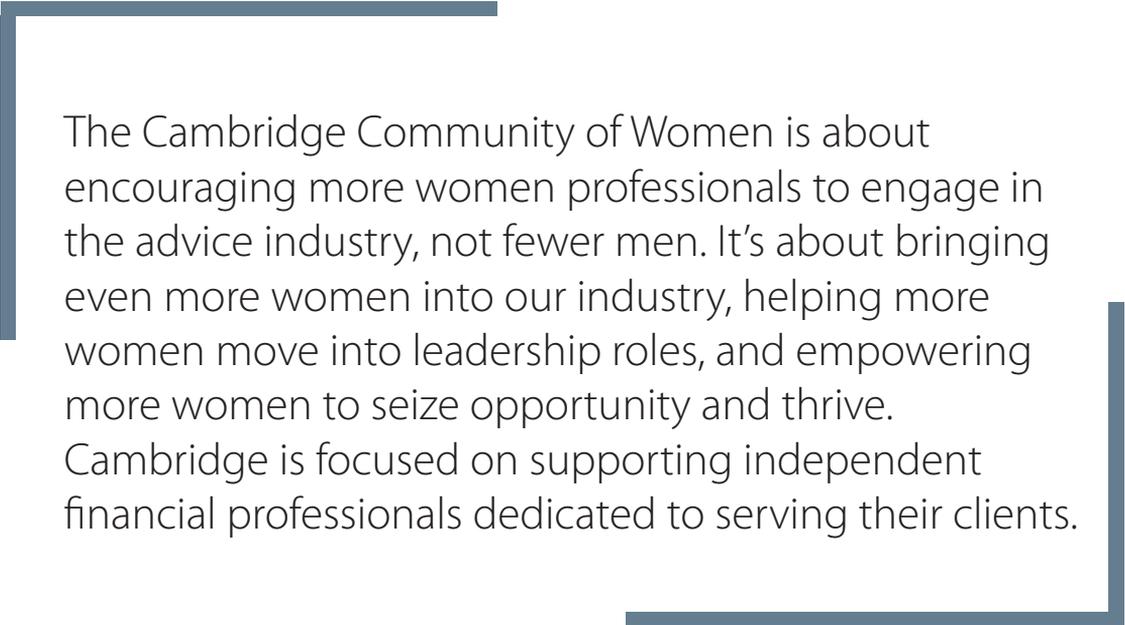


Cambridge

*Community*

of Women





The Cambridge Community of Women is about encouraging more women professionals to engage in the advice industry, not fewer men. It's about bringing even more women into our industry, helping more women move into leadership roles, and empowering more women to seize opportunity and thrive. Cambridge is focused on supporting independent financial professionals dedicated to serving their clients.

Community | Collaboration | Connected

## Cambridge Community of Women

The Cambridge Community of Women was formally launched in 2011 to bring Cambridge women together on a more regular basis. Initially, this group created community through monthly calls with topics driven by women financial professionals, and led by one of our female practice management coaches.

Over time, this group of financial professionals has joined together for lunch each year at Ignite, our national conference – and we host well over 100 ladies for an energized lunch with fellow women financial professionals presenting.

## Cambridge Community of Women Forum

Cambridge President and CEO, Amy Webber, is passionate about diversifying the financial landscape and attracting new talent to our industry. She, along with other women in senior leadership, created the Cambridge Community of Women Forum in 2011 as a vehicle for women financial professionals to share ideas, connect, and learn. The Cambridge Community of Forum is now hosted by women leaders from the Cambridge home office and brings together this collaborative community for a day and a half of networking with each other, sharing best practices, and inspiring one another with new ideas to take back to their practices – and to their lives.

## Cambridge Women Financial Professionals

17% of producing Cambridge financial professionals are women  
25% of FINRA licensed financial professionals are women

Cambridge women financial professionals are represented in Cambridge's Leader's Club, Signature Club, and Premier Club – and many are engaged across advisory councils ranging from issues on regulatory change to NextGen and New Century digital marketing and client communication.





## Cambridge Women

The Cambridge women-inspired initiative is all about more women, not fewer men – and based on our demographics we are doing better in this area than most across the industry. Cambridge is led by President and CEO, Amy Webber, who is a well-respected leader in the financial services industry, and one of the few female CEOs. Nearly 66 percent of Cambridge home office associates and 30 percent of senior executives are women. This leadership percentage increases even higher in the next tiers of leadership with 38 percent of our vice presidents being women and 44 percent of our assistant vice president positions being held by women.

## Cambridge Women Industry Event Involvement

In addition to Cambridge women's initiatives, we are actively invested in the women's community throughout the financial services industry. We have been an engaged participant and partner with many organizations across the industry, including:

- *InvestmentNews* Women Adviser Summits
- Women in Insurance and Financial Services (WIFS)
- Women in Pensions and Investments Network
- *Financial Advisor* Invest in Women
- *InvestmentNews* Women to Watch
- *Financial Planning* Women Advisor Forum
- HER Luncheon hosted by the *Gazette*
- Investments and Wealth Institute "Women in Wealth" program

# Cambridge Women Leaders Across the Firm

**ALISA THOMPSON**



Assistant Vice President,  
Financial Reporting

**AMANDA REINEKE**



Vice President,  
Accounting and  
Continuous Improvement

**AMY WEBBER**



President and  
Chief Executive Officer

**ANDREA SHAFER**



First Vice President, Legal

**BOBBI SMITH**



Senior Vice President,  
Business Strategy

**CARLA STONE**



First Vice President,  
Finance and Controller

**CARRIE LATHROP**



Vice President, Legal

**CINDY SCHAUS**



First Vice President,  
Public Relations and  
Creative Marketing

**COLLEEN BELL**



Executive Vice President,  
Operations and Chief  
Fiduciary Service Officer

**CRYSTAL NEUBAUER**



Assistant Vice President,  
Education and Events

**JACQULYN FLATTERY**



Assistant Vice President,  
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**KRISTINA QUINN**



Assistant Vice President,  
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# Cambridge Women Leaders Across the Firm

**LAURA PAPER**



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**LIZZIE WARNER**



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**SARAH BERNER**



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Operations

**SHARON BOATMAN**



Assistant Vice President,  
Operations

**TAMMY ROBBINS**



Executive Vice President,  
Business Development  
and Chief Business  
Development Officer

**TERI BOCKTING**



Vice President,  
Human Resources

**VALARIE VEST**



Vice President,  
Fiduciary Services

Some leaders are  
born women.

## Cambridge Is a Financial Solutions Firm

Cambridge Investment Group, Inc. is a privately controlled financial solutions firm focused on serving independent financial professionals and their investing clients. Cambridge offers a broad range of choices for independent financial professionals regarding solutions for advice, growth, technology, and independence.

Cambridge's national reach includes: Cambridge Investment Research Advisors, Inc. – a large corporate RIA; and Cambridge Investment Research, Inc. – an independent broker-dealer, member FINRA/SIPC, that is among the largest privately-controlled independent broker-dealers in the country.

Cambridge supports financial professionals and their clients in all 50 states and is headquartered on a scenic, Midwestern 60-acre campus in Fairfield, Iowa.



Cambridge  
*Community*  
of Women

The Cambridge Community of Women emblem was created as a symbol to reflect the qualities of its members. The separated rectangle with the font breaking the path represents the close-knit relationships of the Cambridge Community of Women and the endless potential and strength its members hold to break through industry barriers and challenges. The color blue is the shade of the sea and the sky which is thought to induce calm and convey trust, serenity, and peace. It instills confidence and inspires feelings of loyalty, integrity, and responsibility. All traits we feel our Cambridge Community of Women embodies.



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