APPENDIX A

Education and Business Standards - General Disclosure Statement

Weatherly Asset Management (WAM) requires that advisors in its employ have a bachelor's degree and further coursework demonstrating knowledge of financial planning and tax planning. Examples of acceptable coursework include: MBA, CFP®, CFA®, ChFC, JD, CTFA, CPA, AIF®, Series 65 and Series 66. Additionally, advisors must have work experience that demonstrates their aptitude for financial planning and investment management.

Education, Certifications, Credentials, Other Designations, and Memberships - Detailed Disclosures

Education, Certifications, and Credentials:

[A]**Certified Financial Planner (CFP®):** The Certified Financial Planner (CFP®) designation is a voluntary certification that is recognized for its high standard of professional education, stringent code of conduct and standards of practice, and ethical requirements that govern professional engagements with clients.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the four E's: (1) **Education**, by completing college or university-level coursework through a program registered with CFP Board; earning an accredited college or university bachelor's degree or higher; and completing a financial plan development "capstone" course, (2**) Examination**, by passing the CFP® Certification Examination, administered in two 3-hour sessions on one day, (3) **Experience**, by completing a minimum of three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year), and (4) **Ethics**, by agreeing to be bound by CFP Board's Standards of Professional Conduct, a set of documents outlining the ethical and practice standards for CFP® professionals. Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks: (1) Complete thirty hours of continuing education hours every two years, including two hours related to the Code of Ethics and other parts of the Standards of Professional Conduct, to maintain competence and keep up with developments in the financial planning field; and (2) Renew an agreement to be bound by the Standards of Professional Conduct. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® and CERTIFIED FINANCIAL PLANNER™ are certification marks owned by the Certified Financial Planner Board of Standards, LLC. These marks are awarded to individuals who successfully complete the CFP Board's initial and ongoing certification requirements. To learn more about CFP® certification, visit www.cfp.net

[B1]**Chartered Financial Analyst® (CFA®):** The Chartered Financial Analyst (CFA) designation is a globally respected, graduate-level investment credential awarded by the CFA Institute, the largest global association of investment professionals. The CFA Program curriculum provides a comprehensive framework of knowledge for investment decision making and is firmly grounded in the knowledge and skills used every day in the investment profession.
To earn the CFA designation, candidates must (1) Pass three sequential, six-hour examinations covering areas such as accounting, economics, ethics, money management and security analysis along with ethical and professional standards, (2) Have at least four years of qualified professional investment experience, (3) Join the CFA Institute as members, (4) Commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct and 5) voluntarily complete and attest to 20 hours of continuing education including 2 hours in the content areas of Standards, Ethics, and Regulations. An integral part of the CFA Institute mission is to develop and administer codes, best practice guidelines, and standards to guide the investment industry. These standards help ensure all investment professionals place client interests first. CFA charterholders must abide by the CFA Institute's Code of Ethics and Standards of Professional Conduct. CFA® and Chartered Financial Analyst® are registered trademarks owned by CFA Institute.

[B3]**CFA Society San Diego, a Member of the CFA Institute Global Network of Societies:** *Affiliate* members must meet the following criteria: Bachelor's degree or equivalent education/work/experience; 12 months of relevant work experience; fulfill such other requirements as the Society may impose consistent with requirements established by CFA Institute; be accepted by CFA Institute as an Affiliate Member; submit the CFAI Member's Agreement, the CFAI Professional Conduct Statement, and any additional documentation requested by CFA Institute; and provision of 3 professional references. *Regular* members must meet the following criteria: Bachelor's degree or equivalent education/work/experience; Passing score on CFA Level I exam or the self-administered Standards of Practice Exam; 48 months of professional work experience in investment decision-making; submit a Member's Agreement and a Professional Conduct Statement to CFA Institute; provision of 3 professional references. To learn more about the CFA Society, visit https://www.cfasociety.org/sandiego/home

[B4]**CFA Society- Affiliate Membership with the CFA Society:** Affiliate memberships with a CFA Society is granted to investment professionals who do not intend to participate in the CFA Program or who have not yet met the requirements for regular membership.
To learn more about the CFA charter, visit www.cfainstitute.org

[mm]**Certified Public Accountant (CPA):** The National Association of State Boards of Accounting (NASBA) certifies the California Board of Accountancy (CBA) to license a Certified Public Accountant (CPA) in the state of California. To qualify for a CPA license four criteria must be met: exam, education, experience, and ethics. First, the CPA exam consists of four, four-hour sections that must be passed within an 18 month period by earning a minimum score of 75 on each part. Second, all applicants for licensure must have a baccalaureate degree in addition to 150 total semester units which include 24 semester units of core accounting subjects, 24 semester units of core business subjects, 20 semester units of accounting study, and 10 semester units of ethics study. Third, attest applicants must provide the CBA with satisfactory evidence of having completed a minimum of 12 months of general accounting experience including a minimum of 500 hours of attest experience obtained in public accounting, supervised by an individual who holds a valid, active CPA license. Forth, applicants must pass the California Professional Ethics Exam which provides comprehensive coverage of the AICPA Code of Professional Conduct and California Accountancy Act and Accounting Rules and Regulations. Additional requirements for an application include valid US Social Security Number, Criminal history background check, fingerprinting, and CPA licensure and application fees. To learn more about the CPA Licensing requirements, visit: https://www.calcpa.org/become-a-cpa/cpa-licensure/cpa-licensure-requirements

[D]**Series Exams:** The Uniform Investment Advisor Law Series Examinations are regarding topics that have been determined to be necessary to understand in order to provide investment advice to clients. The examinations are closed book test, administered by the FINRA, and include Series 65 http://www.finra.org/industry/series65, Series 66 https://www.finra.org/registration-exams-ce/qualification-exams/series66, and Series 7 https://www.finra.org/registration-exams-ce/qualification-exams/series7

[DD]**Insurance Licenses:** The California Department of Insurance (CDI) was created in 1868 as part of a national system of state-based insurance regulation. CDI enforces the insurance laws of California and has authority over how insurers and licensees conduct business in California. Licensing qualifications are set by CDI: Life-Only: http://www.insurance.ca.gov/0200-industry/0050-renew-license/0200-requirements/life-only/quals.cfm
Accident & Health: http://www.insurance.ca.gov/0200-industry/0050-renew-license/0200-requirements/accident-health/quals.cfm
For more information, visit http://www.insurance.ca.gov/0500-about-us/01-commissioner/index.cfm

[F]**MACC - Masters of Science in Accountancy University of San Diego:** The Master of Science in Accountancy degree at the University of San Diego is a 30 unit program for those with an undergraduate accountancy degree. Criteria evaluated for admission include the program application, professional letters of recommendation, a personal statement, resume, college/university transcripts, GMAT, and overall and accounting-specific GPA.

[kk]**MSA - Masters of Science in Accounting Southern Methodist University:** Southern Methodist University's Cox School of Business offers a Master of Science in Accounting (M.S.A.) degree. The curriculum of the M.S.A. program is designed to provide students with an in-depth examination of critical accounting, tax and financial issues. Students will take a total of 32 to 40 credit hours depending on their prior academic background. Of the 32 minimum required hours, 22 must be in accounting courses. The fall and spring 16-week terms are divided into two eight-week modules, A and B, with each module course being two credit hours. Application requirements include: online application, resume and essays, GMAT or GRE score (SMU Cox BBA Undergraduates are exempt of this requirement), transcripts, and two references. https://www.smu.edu/cox/Degrees-and-Programs/MS-in-Accounting

[ff] **MSERM - Master of Science in Enterprise Risk Management**: The Master of Science in Enterprise Risk Management (MSERM) at Boston University's Metropolitan College provides the tools and concepts necessary to plan for, prevent, and—when needed—successfully respond to disruptions in business operations. The Enterprise Risk Management graduate program integrates cutting-edge intellectual content from the academic world with sophisticated management practices of leading global corporations. All students must satisfy the degree core courses, specialization requirements, and electives as indicated by the program. A total of 40 credits is required. The department reviews each student's prior academic background in relation to their current professional standing to determine suitability. Candidates for admission to the degree program are selected on the basis of academic transcripts, academic and professional references, and often interviews. Degree candidates have six years to complete the program from the date of their first course.

[gg]**MSPFP - Master of Science in Personal Financial Planning:** The Master of Science Degree in Personal Financial Planning (MSPFP) through the College For Financial Planning (CFFP) is designed for individuals pursuing their CFP® Certification but also seeking a deeper understanding of financial planning. The program consists of a total of 10 courses - five of which are required for the CFP® Designation and the remaining five are geared towards more complex planning topics. The Master of Science Degree Program does not require a GMAT/GRE or other standardized tests for admission. The pre-requisite for the program is a Bachelor's or equivalent 4-year degree.

[ii]**MPAS® - Master Planner of Advanced Studies:** Awarded to individuals who complete the College For Financial Planning's Master of Science degree with a major in personal financial planning. In order to maintain the MPAS designation, individuals must complete 40 hours of continuing education every two years. To learn more visit: https://www.cffp.edu/ms-personal-financial-planning

[jj]**CRPC® - Chartered Retirement Planning Counselor℠:** This program and designation, issued by the College For Financial Planning, enables experienced advisors, who are focused on retirement planning for individuals, define a "road map to retirement." There is a focus on clients' pre- and post-retirement needs, as well as issues related to asset management and estate planning. To learn more visit: https://www.kaplanfinancial.com/wealth-management/crpc

[G]**Vistage Executive Leadership Program – through Stanford Graduate School of Business:** Vistage Worldwide Inc. offers a virtual executive advancement program where participants learn to think strategically: how to identify opportunities and challenges, how to develop a viable course of action, how to formulate a strategy, and how to execute strategy so that their employees are guided and motivated to achieve success. Participants in the San Diego cohort received a Certificate upon successful completion of 3 courses: 1) Strategic Leadership; 2)The Innovation Playbook: Designing Stories for Impact; and 3)Designing Organizations for Creativity and Innovation. Criteria to enroll in the Program included being a [I]Vistage member, nomination by a Vistage Chair to apply, completion of an online application, and payment of tuition. To learn more visit: https://www.vistage.com/stanfordprogram-sandiego

[ll]**California Notary Public:** Individuals appointed as a notary public shall 1) be 18 years of age or older (there is no maximum age set by statute); 2) be a legal California resident; 3) complete a course of study approved by the Secretary of State; 4) satisfactorily complete and pass a written examination prescribed by the Secretary of State; and 5) clear a background check.

[hh]**Professional Certificate in Marketing**: San Diego State University (SDSU) World Campus (also known as College of Extended Studies) and One Club San Diego jointly offer a Professional Certificate in Marketing. Individuals wanting to grow a career in marketing, as well as entrepreneurs and business owners who manage their own media and marketing, are ideal candidates for this program. To earn the certificate, students must successfully complete five (5) core courses, and two (2) electives. All requirements must be completed within two (2) years. No prerequisites or application is required to begin the program. This program is Workforce Approved. The SDSU World Campus is a State-approved provider for the Federal Workforce Investment Act for this program. For more information, visit: https://ces.sdsu.edu/business/professional-certificate-marketing

[##]**Front End Web Development Certificate:** University of California San Diego (UCSD) Extension's Front End Web Development program teaches students to code websites and applications. Core courses focus on HTML5, CSS3, JavaScript and jQuery. The certificate program requires completion of 12 units of core courses.

[ll]**Chartered Financial Consultant® (ChFC®)**: The ChFC® program is offered through The American College of Financial Services. To receive the ChFC® designation, you must successfully complete the eight required courses. The courses cover topics ranging from knowledge on tax and retirement planning to special needs advising, wealth management, insurance, and more. There are no prerequisite courses required before you can begin the ChFC® program, but three years full-time, relevant business experience and a high school diploma or the equivalent are required to use the designation. Participation in the annual Professional Recertification Program (PRP) is required to maintain the designation. To learn more, please visit: https://www.theamericancollege.edu/designations-degrees/ChFC.

[uu]**Financial Modeling & Valuation Analyst (FMVA)®**: The FVMA® Certification program is offered through the Corporate Finance Institute (CFI). CFI is an accredited provider of online courses, designations, certifications, and Microsoft Office productivity tools for finance professionals. To learn more

about CFI, please visit https://corporatefinanceinstitute.com.The FMVA® Certification program teaches essential skills required to perform practical financial analysis. The program consists of 11 core courses to build a strong foundation in financial modeling and valuation and a minimum of 3 elective courses (out of 19 available) to explore more advanced topics and specialized subjects. After completing the required courses, students must complete a final exam (with a minimum passing grade of 70%) to earn the program certification. There are no prerequisites to join the program, however there are 7 optional prep courses available to review the fundamentals. To learn more, please click here.

[bbb]**Enrolled Agent (EA):** An enrolled agent is a person who has earned the privilege of representing taxpayers before the Internal Revenue Service by either passing a three-part comprehensive IRS test covering individual and business tax returns, or through experience as a former IRS employee. Enrolled agent status is the highest credential the IRS awards. Individuals who obtain this elite status must adhere to ethical standards and complete 72 hours of continuing education courses every three years. To learn more, please click here.

Other Designations & Professional Memberships

[l]**Vistage:** is the world's leading peer advisory membership organization. Vistage is a by-invitation-only membership organization. To become a member, individuals must 1) be a CEO, executive or business owner; 2) be committed to raising the standard of his or her business; and 3) have a company that is established and open to innovative thinking. Members pay an annual fee to be a part of Vistage. To learn more about Vistage, visit www.vistage.com

!!!!Vistage Key Executive Program: This is a by-invitation-only membership for C-level execs, VPs and directors from diverse backgrounds and businesses that are employees of Vistage[l] members from non-competing industries. Members pay an annual fee to part of this program; there are 12 full-day meetings to year led by a highly trained executive coach.

!!!Vistage Emerging Leader Program: Vistage Worldwide Inc. offers a 2-year program available only to employees of Vistage[l] members. The program is facilitated by a Vistage Chair and consists of 6 all day-meetings per year with training in 12 leadership competencies within four key areas: personal, inter-personal, team and organizational leadership. Under the guidance of a Vistage Chair, Participants develop core leadership competencies and confidence, empowering them to deliver on company goals. Criteria to enroll in the Program include nomination by a Vistage Chair to apply, completion of an online application, and payment of tuition.

[!!!!!]**Vistage Advancing Leader**—Vistage Advancing Leader is a peer advisory group designed for operational leaders who turn strategy into results: VPs, directors, function heads, and experienced managers responsible for executing key initiatives. For more information, please see https://vistage.com/membership/programs/advancing-leader-program/

[#]**The San Diego Women's Foundation (SDWF):** The Foundation's mission is to educate and inspire women to engage in collective philanthropy. Members are catalysts for change, investing in innovative solutions that benefit undeserved communities in the San Diego region. The San Diego Women's Foundation has grown to an organization of more than 215 members. Each member has committed to an annual contribution of $2,250 (or $1,125 for those under 40) for a minimum of five years and has one vote to determine where grants will be awarded each year. For more information, visit http://www.sdwomensfoundation.org

[aaa]**SDWF board member** – Board members are nominated by SDFW's Governance committee after the candidate goes through an interview process with a previous board member. Formal approval is then given by the San Diego Foundation's Board of Governors.

[w]**The San Diego Women's Foundation Finance Committee (SDWF):** The SDWF Finance committee is led by the SDWF Treasurer and Finance chair. The committee's focus is to meet on a monthly basis to review the SDWF financial data and processes, including financial statements, budget, and dues structure. Committee members must be members of the San Diego Women's foundation, and volunteer for the finance committee position.

[+]**Financial Planning Association (FPA) and FPA NexGen:** The Financial Planning Association ® (FPA®) is the principal professional organization for CERTIFIED FINANCIAL PLANNER™ (CFP®) professionals. FPA supports high standards of professional competence, ethical conduct and clear, complete disclosure when serving clients. FPA San Diego is one of the largest FPA chapters in the country with an impressive membership reflecting some of the most experienced and influential professionals in the financial services industry. The association strives to provide education and resources to benefit its members and to represent the financial planning professional in local, statewide, and national matters through its Political Action Committee. In order to become a member of the association, members are required to be CFP certified or a CFP candidate, and are required to pay dues. For more information, visit https://fpasandiego.org. The next generation is comprised of new and aspiring financial planners who come from a variety of life experiences and backgrounds. FPA gives them a professional home from which they can thrive. More information about FPA NextGen is available here https://www.financialplanningassociation.org/networking/fpa-nexgen.

[=]**Executive Financial Planner Advanced Certificate Program at San Diego State University:** The "Executive Financial Planner" Advanced Certificate program is a six-course circular program (students can enter at the start of any of five classes and then complete the capstone class). The goal of the Executive Financial Planner Advanced Certificate program is to enable experienced financial services professionals to understand the content material of financial planning with the goal of providing advice based solely on the interests of their clients. Students are required to pay tuition and application fees for this program.

[%]**San Diego Foundation's Investment committee**: With over 150 years of combined global and domestic expertise, The San Diego Foundation Board of Governors Investment Committee drives asset management and investment growth to meet fund objectives. The Investment Committee is committed to: Protecting the corpus of the Foundation; preserving the spending power of the income from the fund; maintaining a diversified portfolio of assets in order to meet investment return objectives while keeping the level of risk commensurate with that of the median fund in a representative foundation and endowment universe; and complying with applicable law. For more information, visit: https://www.sdfoundation.org/about-us/financials-investments/investments/#investment-committee

[lll]**Athena Auction Committee Member-Athena Pinnacle Scholarship Gala** Athena is the premiere professional organization for women in Science, Technology, Engineering and Mathematics (STEM), connecting the top leaders in STEM for nearly two decades. As part of the Pinnacle program and to ensure the development of future leaders, Athena awards Pinnacle Scholarships to five (5) deserving high school senior girls pursuing careers in science, technology, engineering or math. The nominees and winners are celebrated in a special evening dinner and auction in the spring gala of each year. Auction committee members are required to help obtain and organize items for auction prior to the gala. To learn more visit: https://www.prweb.com/releases/athena_pinnacle_awards_to_honor_executives_corporations_and_educators_working_to_promote_women_leaders/prweb12677805.htm

[tt]**University of San Diego Preceptorial Assistant Program:** The overall purpose of the University of San Diego Preceptorial Assistant (PA) Program is to foster a successful and positive educational and developmental experience for all first-year students. PAs are successful continuing students who serve as mentors for first-year students. They are assigned to and responsible for a particular preceptorial class. Undergraduates who wish to serve as PAs must be nominated by the faculty and screened by a selection committee consisting of faculty and members of the Preceptorial Assistant Council (PAC). In addition, all students must attend an information session in the spring prior to submitting an application. Ordinarily, only those students with a minimum grade point average of 3.00 will be considered. Qualified students must have full time status and be in good conduct standing at USD. To learn more about the USD PA Program, now called the Scholastic Assistant Program, visit: https://www.sandiego.edu/

[ss]**San Diego Society for Human Resource Management (SD SHRM) Professional Member:** SD SHRM is the local chapter of the national Society for Human Resource Management (SHRM) SHRM is the world's largest HR professional society, representing 285,000 members in more than 165 countries. Individuals engaged in the profession of human resource management and who meet one of the criteria below are eligible for professional membership status in the San Diego chapter: 1) At least three years of exempt-level human resource experience; 2) Certification by the Human Resource Certification Institute (HRCI) or its predecessor, the Personnel Accreditation Institute (PAI), as a Senior Professional in Human Resources (SPHR) or Professional in Human Resources (PHR); 3) Faculty members holding assistant, associate or full professor rank in human resource management or any of its specialized functions at an accredited college or university, and who have at least three years of experience at this level of teaching; 4) Full-time consultants with at least three years of management experience as a human resource practitioner and whose practice is primarily directly related to the practice of human resource management; or 5) Attorneys with at least three years of primary practice in any of the following areas: labor and employment law and/or employee benefits (e.g., pension, retirement, 401(k), Sec. 125, health and welfare plans, ESOPs, or workers' compensation). Professional members may vote, serve on committees and hold office on the Board of Directors.

[vvv]**VITA certificate:** The IRS sponsors Volunteer Income Tax Assistance (VITA) & Tax Counseling for the Elderly (TCE) Programs. VITA and TCE are IRS-sponsored programs that provide free filing assistance in underserved communities for low-to-moderate income families, the elderly, the disabled and those who speak very little English. In order to become a VITA volunteer, candidates must 1) apply and 2) a) successfully complete the Intake/Interview and Quality Review Exam; b) pass the program's Basic Exam; and c) pass the program's Volunteer Standards of Conduct Exam. To learn more visit https://www.irs.gov/individuals/irs-tax-volunteers and https://www.irs.gov/individuals/free-tax-return-preparation-for-you-by-volunteers

[ee]**Gonzaga University Investment Club (formerly Bulldog Investment Group)**: Gonzaga University Investment Club (GUIC) is an informational club associated with Gonzaga University with the purpose to teach members about Finance by managing a student-run portfolio. The purpose of GUIC is to invest the assets of GUIC in stocks, bonds and other securities for the education and benefit of the partners who will consist of individuals who are academically in good standing with Gonzaga University, Spokane, Washington, as well alumni of Gonzaga University, and friends of Gonzaga University. Capital Contributions are not required for membership. Student members must be enrolled as a student of Gonzaga University and be in good standing and must submit a written application of membership to the President. To learn more, visit https://guic.org/

[nn]**BBA Scholar**: BBA Scholars are pre-selected for Cox admission based on their application for admission to SMU and academic performance prior to entering SMU. This program includes the top tier of business students. Students are notified of their selection for the BBA Scholars Program shortly after receiving acceptance to SMU in their senior year of high school. As BBA Scholars, they participate in the normal SMU/Cox curriculum, but have the added advantages of Cox admission in the first year, Cox scholarships, early access to Cox Advising & Career Services opportunities, and special programs and events designed exclusively for Business Scholars. Approximately 100 students enter SMU as BBA Scholars each year. Scholars come from across the U.S. and from other countries, and represent the strongest business applicants in the incoming class.

[oo]**Share the Struggle Mentor Program**: Share the Struggle is an initiative of Taming Mustangs, a 501(c)3) Non-Profit. Share the Struggle Mentor Program is an online platform where individuals are matched with a volunteer mentor who has experienced similar struggles and can provide hope and healing. Criteria to become a mentor include 1) completion of an online mentor training e-course consisting of 5 live training modules, 2) two references, 3) completion of a background check, and 4)completion of QPR Suicide Prevention Training. Mentors are then paired with an individual based on mutual experiences. Mentors make a minimum commitment of 1 hour/week for 4-6 months of mentoring. To learn more visit: https://www.sharethestruggle.org/.

[qq]**Boys & Girls Club of Vista:** Boys & Girls Club is a national organization of local chapters which provide voluntary after-school programs for young people. Their mission is to empower every club member to graduate with a career or college plan, contribute to their community, and live a healthy lifestyle. They offer programs for kids ages 5-18 that focus on character and leadership development, academic success and healthy lifestyles. To learn more, visit: https://www.bgcvista.org/.

[v]**Estate Planning Council of San Diego (EPCSD):** The Estate Planning Council of San Diego is an interdisciplinary organization for professionals involved in estate planning. Since its inception, in 1955, the Council's primary objective has been to provide a better understanding of the services performed by attorneys, life insurance agents and representatives, trust officers, accountants, financial advisors, planned giving professionals and others substantially involved in estate planning and to promote cooperation among them. In order to become a member of the council, members are required to be sponsored by three existing council members and pay a membership fee. Emeritus membership is granted to those who have been a member of EPCSD for 10 years or more, at a lower membership renewal cost. For more information, visit http://www.epcsd.org.

[ww]**North County Estate Planning Council (NCEPC):** The NCEPC's mission is to encourage and cultivate interdisciplinary collaboration, education, and networking between the core professional disciplines (JD, CPA, CLU, CFP®, and Trust Officers) as well as others in this planning arena; and to serve the north San Diego County community by increasing public awareness of the need for competent estate planning. In order to become a member of the council, members are required to be sponsored by three existing council members and pay an annual membership fee. For more information, visit http://ncepc-sd.org/index.php

[rr]**Pawsitive Teams:** Pawsitive Teams is a 501(c)(3) nonprofit corporation in California that trains and places service dogs with persons with disabilities, runs goal-directed therapy dog programs, and trains and places facility dogs. The mission of Pawsitive Teams is to enhance the lives of individuals with special needs who live in San Diego County by using the skills of highly-trained service and therapy dogs. To learn more, please visit: https://pawsteams.org/our-mission.

[www]**Finance and Investment Society:** San Diego State University's Finance and Investment Society (FIS), provides students with the opportunity to further their industry knowledge, expand their professional network, and pursue a career in high finance. Members have exclusive access to FIS speakers, workshops, competitions, research programs, company recruiting events, internships, networking nights, discounted certifications, mentorship opportunities, social events, community service, executive board leadership roles, and a vast network of students and alumni. All SDSU students

(undergraduate and graduate) of any academic discipline are welcome to join FIS. Members are required to pay dues. To learn more, please visit: https://www.linkedin.com/company/sdsu-fis/about/

[ccc] **Del Mar Women's Giving Collective:** the DMWGC is a community of Del Mar women that gives collectively to amplify our impact as donors. Our vision is to grow as a philanthropic community that has a meaningful financial impact on non-profit organizations meeting the needs of under-served populations in San Diego County. DMWGC is a non-profit 501c3 charitable organization and your entire donation is tax deductible. Membership is open to women of all ages (18 or older) who live in the 92014-zip code beginning in August. Minimum commitment of 2 years to join. Member giving requirement is $1,100 per year. ($1,000 is added to our collective grant making pool, $100 is used to administer our organization). For those paying by check the amount of your donation is $1,100. For those paying by credit card the amount of your donation is $1,135 to cover extra fees. Donations must be received by November 30 to qualify for membership for that upcoming Spring giving cycle. https://www.dmwgc.org/about-us

[**++] **Women In Business Club at San Diego State University- WIB- SDSU** the SDSU WIB club's mission is Our initiative is to empower and support those who identify as women that are majoring, minoring, or are interested in business administration at San Diego State University. Members strive to provide an inclusive space fostered by intersectionality. Women in Business informs, engages, and guides our members to leadership/career opportunities because we believe in their potential to make a difference. Participation and membership in the organization shall be open to those enrolled at San Diego State University. Each member must fill out the Women in Business membership application form, submitted alongside dues by the second meeting of the semester. To learn more, visit https://www.sdsuwib.org/

[&&] **Rady Estates and Trusts Council Membership:** Rady Children's Foundation consists of a membership group of estate and financial professionals who are champions for kids' health and well-being that allows kids to be kids. There is no cost to join. Interested parties fill out a membership form and send to the Children's Foundation. To learn more, visit https://giftplanning.radyfoundation.org/estates-and-trusts-council