



*Women*  
Creating Wealth & Impact

PRESENTS

THE MONEY

*Takeover*

WEALTH CONFERENCE 2023

FRIDAY, AUGUST 18 - SUNDAY, AUGUST 20, 2023

## *Sponsorship Opportunities*

I'm excited to introduce, Women Creating Wealth & Impact's (WCWI), 2nd Annual Wealth Conference. WCWI's finance conference will be a unique, exciting, and fun experience! Not only will women be inspired, motivated, and educated, but they will apply what they learn during the conference to their own lives and leave with tangible financial resources tailored to their personal circumstances. This experience is guaranteed to enhance their financial competencies and practices, transforming their financial future.

According to research by McKinsey & Company published in 2020, approximately \$30 trillion in wealth is set to change hands in the next decade and women are poised to inherit a sizable share. However, only a quarter of affluent women say they are comfortable making investment and savings-related decisions on their own. Financial management is an essential skill for women, and it is important for women to invest time in learning this skill so that they can live a financially abundant life.

Throughout history, women have been the last on the food chain; overlooked, underpaid, and undervalued. Women are still earning, on average, 70 cents to every dollar their male counterpart earns. Recently, Cleveland was named the worst large City in America for Black Women. Although the odds are stacked against women, it is clear that women add significant value to every space they occupy. Women are no longer accepting this fate and are stopping at nothing to change this unfortunate reality. Women are taking lead roles in organizations and corporations. Women are pursuing higher education at unprecedented rates, making them a formidable competitor in the workplace. The world is finally beginning to take notice. Women are a vital part of this ecosystem and critical to its sustainability. Now...our finances must align with our new roles.

WCWI is committed to the advancement and transformation of women's personal financial competencies and practices, impacting their legacy, and manifesting generational wealth in hopes of closing gaps and leveling the playing field for women.

We invite you to support this critical movement. Your support of WCWI's 2nd Annual Women's Wealth Conference will power the critical work of ensuring women are adept at making major financial decisions, prepared for the transference of wealth, and have the knowledge and confidence necessary to create generational wealth.

This conference will include an in-depth orientation and exploration of the following financial areas:

- Money Mindset
- Financial Planning/Budgeting
- Credit Restoration & Debt Consolidation
- Retirement Planning, Investment & Insurance
- Estate Planning
- Franchising
- Advanced Investing
- Entrepreneurship
- Real Estate Investing

Thank you in advance for your consideration and we invite you to join us as we make financial lit-HER-acy!

*Meltrice D. Sharp*  
Founder and Visionary



# Meltrice D. Sharp, CPA

I'm a Certified Public Accountant and a managing partner at Creating Leading Enterprises (CLE), an accounting and consulting firm specializing in accounting, tax, payroll, and business consulting for small and middle-market companies, nonprofit organizations, religious organizations, and individuals.

I've spent more than twenty years of my life devoted to helping others manage their personal and business finances, working with them to create the structures and strategies that will foster growth and sustainability for their future.

I believe the relationship between generational and community wealth is essential to leave an enduring legacy, and it is this belief that drives my work. The former is integral to the financial wellness of those coming behind us, the latter is key to the economic development of the neighborhoods where they'll live and thrive. It is these two forces combined that create the financial worldview our children will inherit, a reality that keeps me tethered to my life's tasks and striving to educate and empower others with this truth.

I'm a natural extrovert, and I spend a great deal of my time in civic circles that intersect with the causes I'm most passionate about: women's empowerment, minority advocacy, advancement, entrepreneurial investment, and innovation.

Faith and family are my core values, and financial freedom is my status symbol of success. In my spare time, you can find me hanging out with my family and telling corny jokes to my kids (who insist that I'm not funny while they're cracking up). My guilty pleasure is vegging out on the couch and watching reality TV.

## Professional Associations + Affiliations

- ✔ Women Creating Wealth & Impact, Founding Member
- ✔ Cuyahoga County Audit Committee Board
- ✔ Deaconess Foundation, Treasurer
- ✔ Rainbow Babies & Children Foundation, Assistant Treasurer
- ✔ YWCA, Trustee
- ✔ National Association of Minority Contractors, Treasurer
- ✔ Women of Color Foundation, Trustee
- ✔ Tri-C Business Advisory Committee, Member
- ✔ Black Professionals Association Charitable Foundation, Immediate Past President
- ✔ Alpha Kappa Alpha Sorority Incorporated, Alpha Omega Chapter



# Women

Creating Wealth & Impact

## Vision

Women Creating Wealth & Impact's vision is to be a leading organization in the advancement and transformation of women's financial competencies and practices, impacting their legacy and manifesting generational wealth.

## Mission

WCWI's mission is to provide a safe platform that will inspire, empower, educate, and transform the financial futures of women through the practical application of sustainable financial techniques.

## Conference Value

Financial literacy is an essential component of an individual's financial wellness. Financial literacy is achieved when an individual possesses the knowledge and skills to make informed and effective decisions about money and financial goals. Many Americans lack adequate financial literacy education and training, resulting in ill-informed financial decisions with long-lasting, detrimental consequences.

WCWI's finance conference is unique because, women will not only be inspired, motivated, and educated but they will have an opportunity to apply what they learn during the conference to their personal lives with the assistance of trained experts and facilitators.

During the conference, women will assess their current financial literacy, identify their personal financial SMART goals, develop, and customize a personal strategy to achieve their goals in the following areas.





# Women

Creating Wealth & Impact

## Conference Schedule

Women Creating Wealth & Impact's vision is to be a leading organization in the advancement and transformation of women's financial competencies and practices, impacting their legacy and manifesting generational wealth.

**The Westin Downtown Cleveland**  
777 St Clair Ave NE, Cleveland, OH 44114

### FRIDAY, AUGUST 18TH

5:30 PM — 9:00 PM  
**Afterwork Mixer**

### SATURDAY, AUGUST 19TH

8:00 AM — 9:00 AM  
**Breakfast & Registration**

9:00 AM — 9:30 AM  
**Guest Speaker**

10:00 AM — 12:30 PM  
**Morning Sessions**

1:00 PM — 2:00 PM  
**Lunch & Fireside Chat**

2:15 PM — 4:45 PM  
**Afternoon Sessions**

#### **SATURDAY SESSIONS:**

Session #1:  
**Financial Planning & Budgeting**  
Meltrice D Sharp, CPA

Session #2:  
**Estate Planning & Insurance**  
Clarissa Foster

Session #3:  
**Real Estate Investing**  
Andrea Wilson

Session #4:  
**Building an Investment  
Portfolio for Wealth & Legacy**  
Raquel Curtis  
"The Boujee Banker"

### SUNDAY, AUGUST 20TH

8:00 AM — 9:00 AM  
**Breakfast & Registration**

9:00 AM — 9:30 AM  
**Guest Speaker**

10:00 AM — 12:30 PM  
**Morning Sessions**

1:00 PM — 2:00 PM  
**Lunch & Fireside Chat**

2:15 PM — 4:45 PM  
**Afternoon Sessions**

5:00 PM — 6:30 PM  
**Closing Celebration**

#### **SUNDAY SESSIONS:**

Session #1:  
**Credit Repair & Debt Consolidation**  
Harrison Gilmer

Session #2:  
**Insurance, Investments  
& Retirement Planning**  
Equitable Advisors

Session #3:  
**Franchising**  
Terese McGoarty

Session #4:  
**Entrepreneurship**  
LaRese Purnell



# Women

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## Sponsorship Levels

### Legacy Creator

**\$6000**

- ✔ Full-page back cover color ad in the conference program
- ✔ Five general conference registrations
- ✔ Logo on conference signage, event promotions, and website
- ✔ Three-minute welcome remarks at the opening session
- ✔ Sponsor session of choice (mention before and after session)

### Estate Planner

**\$2500**

- ✔ Quarter-page color ad in the conference program
- ✔ Two general conference registrations
- ✔ Name on conference signage, event promotions, and website

### Wealth Generator

**\$4500**

- ✔ Full-page color ad in the conference program
- ✔ Four general conference registrations
- ✔ Logo on conference signage, event promotions, and website
- ✔ Three-minute welcome remarks at the event session
- ✔ Sponsor session of choice (mention before and after sessions)

### Money Manager

**\$1500**

- ✔ Quarter-page color ad in the conference program
- ✔ One general conference registration
- ✔ Name on conference signage, event promotions, and website

### Investor

**\$3500**

- ✔ Half-page in-color ad in the conference program
- ✔ Three general conference registrations
- ✔ Name on conference signage, event promotions, and website

### Individual Patron

**\$1000**

- ✔ Half-page in-color ad in the conference program
- ✔ One VIP conference registration



*Thank you in advance for partnering with  
us through your sponsorship*

## CONFERENCE LOCATION

**The Westin Downtown Cleveland**


777 St Clair Ave NE  
Cleveland, OH 44114

## CONNECT WITH US!

 meltrice\_wcwi

 women creating wealth & impact

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 [www.womencreatingwealth.com](http://www.womencreatingwealth.com)

