

# Welcome to The six moments That matter

**"Six Moments That Matter"** is a unique and proven life-stage framework created by Jane Portas. Originally developed to help people live a fair and secure financial life, it highlights 12 key risks and opportunities that shape our Financial Life Journeys.

When you look back at your career to date you can often identify those key moments that mattered – sometimes they were clear, sometimes not, they didn't always feel good at the time, but they have shaped your experience, who you are and often have forced growth and opportunities that got you to where you are today.

So we asked the question - what could the impact be if we were more intentional about identifying and helping women in those key moments that matter across each stage of their learning and working life?

## Agenda

- 12.30 - 1.00** Champagne - Vicky Brook - Welcome
- 1.00 - 1.30** Main Course
- 1.30 - 2.00** Guest Speakers - Helen Roberts and Kay Williams - Talented Women
- 2.00 - 2.30** Dessert
- 2.30 - 2.50** Coffee and Group Share of Moments
- 2.50 - 3.20** Guest Speaker - Lucy Wilson  
Shine Strong Revolution
- 3.20 - 3.30** Close

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# Our Speakers

## TALENTED WOMEN



### Helen Roberts

Helen's career started out with a first class honours degree in English. She originally wanted to become a journalist or write a bestseller before a fascination with people enticed her into a career in HR. As a HR Director she saw first hand the power that comes when people find and live their best selves – and the transformative powers of great leadership and culture on the bottom line. She now combines her 25 years+ people career and love of stories to help leaders, teams and organisations find and write their own brilliant bestsellers.

### Kay Williams

Kay spent 25 years within financial services in leadership roles across Marketing and Analytics. Her true passion in all these roles was leading diverse teams and helping her people to grow and develop. She is now able to indulge this passion as she works independently helping a range of organisations to develop strong team dynamics and deliver great results.

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We are both delighted and honoured to have been asked to be involved in the WLG Six Moments that Matter campaign. Our Talented Women Programme is founded on the power of stories and support networks, and those key moments in life (sometimes unseen and unrecognised by our conscious mind at the time) have an ability to spark change at a profound level. Equally the power of role models and inspiration can come from the most surprising places, even just a single comment (delivered by the right person at the right time), has the power to be life changing. Excited and energised by what gifts we can find and pass on to our future generations from this.

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# Our Speakers

## Lucy Wilson

Lucy's life changed dramatically after becoming a mother. From supporting her first son through a rare condition and 3 operations while just a baby, to then having the slower realisation that her second son wasn't meeting his milestones and getting a diagnosis of autism and severe global developmental delay.

These challenges had a huge impact on Lucy, but what she didn't know at the time, was that she was also going through the transition of Matrescence. Changes a woman goes through from pregnancy and into motherhood, often for years, which are just as profound as the ones we experience when we become teenagers and go through adolescence, but without any knowledge, warning or real support.

Lucy made it her mission to help educate other new mothers, about Matrescence, and a whole host of topics that can support and empower them in their motherhood journeys.

She's worked with an incredible team of specialists, in a wide range of fields to create MAIA: The Matrescence Empowerment Programme, Which will help new mothers thrive through education, support and community.

The B2B programme will also benefit organisations giving them the chance to support their new mothers, while also helping to retain their female talent and reduce the gender pay gap.

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I was thrilled to be invited to speak by the Women in Leadership Group. When I heard about their research on the origins of successful female leaders, I was fascinated. There is so much potential to help support more future leaders through this work, and I'm delighted to help shine a light on the impact becoming a mother has on women's aspirations and achievements.

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# Menu

## Main Course

Miso Glazed Aubergine

Rump Steak 275g

Baked Sea Bass

## Dessert

Lemon Posset

Warm Chocolate Fondant

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# One moment Shared

Vicky Brook  
Chair WLG

Dealing with Life



**Moment That Mattered:** Choosing Between Career and My Daughter's Health - Stepping back from CEO life to care for my daughter taught me that true leadership is resilience, patience, and adaptability.

When my daughter required emergency life-saving surgery as a baby, I hired a full-time, nurse-trained nanny so I could continue my career, moving to Birmingham to be close to Birmingham Children's Hospital. I wrestled daily with the cost-versus-benefit, and the guilt. Should I give it all up to be a full-time mum?

Years later, when she was 8 years old, as CEO of a European division for a Chicago-based company and a single mother, her health challenges deepened. Even my strong support network couldn't meet her needs. Eventually, I made the hardest decision of my life: to pause my career.

That decision forced me to dig deep into my resilience bucket. I had to be accepted not as a CEO, but as the mother of a very sick child. A child that was house bound. I had to motivate myself with the small wins of her recovery rather than the highs of business acquisitions. It taught me that leadership isn't just about strategy and results, it's about adaptability, humility, and finding purpose in a completely different arena. Resilience became my new measure of success. CEO paused, mother present, discovering resilience, patience, and the power of tiny wins.

## How this campaign and the WLG existence matters

If WLG had existed, or my business had been smarter, they could have supported me through one of the hardest periods of my life. Back then, working for a US-based business and very much pre-COVID years, flexible ways of working weren't widely embraced particularly as CEO. Options like a sabbatical, part-time working, job sharing, paid extended leave, home working, mental health support, and personal crisis management could have allowed me to stay engaged in my career while caring for my daughter. A culture that accepted me as a mother first, not just a CEO, combined with emotional and peer support networks, would have ensured my career continued to advance rather than paused, preserving both my wellbeing and leadership trajectory.



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# One moment Shared

Isobel Crosse  
Head of Financial  
Care  
Santander

Finding a Role Model



**Moment that mattered:** This campaign, for the first time, has encouraged me to truly reflect on my career, and why I've made the decisions that I have.

With this in mind, I'm going back to the start, and the person who inspired me when I was making some of my earliest career decisions. So, on to Sara, a family friend just a few years older than me, who showed me what was possible.

I vividly remember watching her flourish at university, and hearing about her amazing experiences during her year in industry working in banking. It was the first time I pictured myself in a corporate world — confident, capable, and part of something exciting. Sara's journey gave me the spark to pursue an economics degree (something I didn't even know was a thing beforehand!), and step into the world of finance. She made it feel achievable — and fun — and that spark has stayed with me as I carved my own path.

I am still inspired by her to this day, her tenacity, caring nature, willingness to take a risk and above all bringing a little fun and naughtiness into whatever she does.

Moments and people like this matter, and it's why I believe so deeply in the power of early visible role models.



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# One moment Shared

**Beth Whelan**  
Chief Strategy &  
Data Officer  
Reassured  
  
Dealing with Life



**Moment that mattered:** Everyone will at some point have an event in their life that creates significant and lasting change, they can be positive moments like becoming a parent or they can be hard moments like the end of a marriage. But it's the big moments in life that are the ones that matter most as they provide an opportunity to grow, find strength you didn't know you had, and can invite you to see life and yourself differently.

When I think about the moments that mattered the most within my career they were some of the hardest moments of my life. In the space of a 2 year period my marriage ended, my brother-in-law died very suddenly, leaving behind my twin sister and 2 young kids, and then I was made redundant after 17 years of service. My heart felt heavy, my confidence was at an all time low and I struggled with the feeling of a loss of identity.

My core motivation throughout this time was to protect my family, and that gave me a reason to rebuild, redefine what was important, and focus on the areas I could control. I was very lucky that I got to work with 2 career coaches during this time, they were very different in their approach, but both helped me step back, and look at what was important to me, to create a framework to navigate important career moves and life decisions, and they kept me focused, and helped me put the right structure in place to protect my wellbeing.

I found a recruiter who took the time to understand me, and who was well connected across multiple industries. The first conversation he set up was with a brilliant female leader who gave me some of the best advice – go and have 100 conversations in 100 days. I didn't quite manage that target, but I did get through a decent amount of coffee! As it turned out it was the first conversation that I had that has resulted in me finding my Chief Strategy and Data Officer role that I love, in a new industry for me where I didn't have any connections and a role that wasn't out in the market yet, which just shows the power of a conversation. I also met Vicky Brook the Chair of the WLG and now work with her as a Regional Ambassador which, along with my Trustee role for Juno Women's Aid a charity that helps women and children who are surviving domestic abuse, has given me a sense of purpose and access to some incredible women to learn from.

I am a better mother and leader for having experienced these life events, more grounded in my values, a greater appreciation, and patience for other people, and I am more confident in myself and my ability to navigate change, and help others do the same.



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# Gaining Momentum

Beth Whelan Chief Data and Strategy Officer, Reassured	Education & Inspiration		Finding a Role Model		Lucy Wilson Founder MAIA	Education & Inspiration		Finding a Role Model		Helen Roberts Co-Founder Talented Women Programme	Education & Inspiration		Dealing with Life		Getting a Promotion		Finding a Role Model		Education & Inspiration		Finding a Role Model
Dealing with Life				Getting a Promotion	Dealing with Life					Getting a Promotion		Dealing with Life		Getting a Promotion			Dealing with Life		Getting a Promotion		
	Seat at the Board		And Beyond			Seat at the Board		And Beyond			Seat at the Board		And Beyond		Seat at the Board		And Beyond		And Beyond		
Vicky Brook Founder P3CL, Chair Women's Leadership Group	Education & Inspiration		Finding a Role Model			Education & Inspiration		Finding a Role Model		Rebecca Adams Account Director Rumpus PR	Education & Inspiration		Finding a Role Model		Seat at the Board		Education & Inspiration		Finding a Role Model		
Dealing with Life				Getting a Promotion			Dealing with Life		Getting a Promotion		Dealing with Life		Getting a Promotion		Dealing with Life		Getting a Promotion		Dealing with Life		
	Seat at the Board		And Beyond		Seat at the Board		And Beyond				Seat at the Board		And Beyond		Seat at the Board		REBHA	And Beyond			

# Thank You

Thank you for joining us at today's launch and for being part of the 6 Moments That Matter campaign.

"The launch of 6 Moments that Matter is more than a campaign, it's a commitment. By sharing our defining moments, we can build future strategies that truly support women at these pivotal points in their journey. As our first campaign outside of London, our first regional initiative, and one linked to both our Pink Star Role Model and the Origins research, it shows the power of collective experience to shape meaningful change."

*Vicky*

A special thank you to our sponsors Avalon Home, Fulcrum Infrastructure Management Limited, inicio.ai, P3CL and Pintail Candles for their generous support in helping bring this vision to life.



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