



# Women ON THE RISE

Pivotal points to success  
shared by members of  
RISE Collaborative Workspace

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Stacy Taubman and Kate Wiegmann

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Published by On the RISE Press, St. Louis, MO  
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Cover design: Stephanie Sabo

Cover photo: Kathleen Mortland

Project management and interior design: Davis Creative, DavisCreative.com

## **Library of Congress Cataloging-in-Publication Data**

Library of Congress Control Number: 2018932377

Stacy Taubman and Kate Wiegmann

Women on the RISE: Pivotal points to success shared by members of  
RISE Collaborative Workspace

ISBN: 9780999752500

Library of Congress subject headings:

1. BUS109000: Business & Economics/Women in Business
2. SEL027000: Self-Help/Personal Growth/Success
3. BUS025000: Business & Economics/Entrepreneurship

## *Our Greatest Fear*

*It is our light not our darkness that most frightens us*

*Our deepest fear is not that we are inadequate.*

*Our deepest fear is that we are powerful beyond measure.*

*It is our light not our darkness that most frightens us.*

*We ask ourselves, who am I to be brilliant,  
gorgeous, talented and fabulous?*

*Actually, who are you not to be?*

*Your playing small does not serve the world.*

*There's nothing enlightened about shrinking so that  
other people won't feel insecure around you.*

*It's not just in some of us; it's in everyone.*

*And as we let our own light shine,  
we unconsciously give other people  
permission to do the same.*

*As we are liberated from our own fear,  
Our presence automatically liberates others.*

*—Marianne Williamson  
Excerpt, "A Return to Love"*

# Foreword

**By Mary Jo Gorman, M.D., M.B.A.**

*I am unapologetically passionate about seeing women succeed.*

**W**hen a woman has a dream, the only greater satisfaction than watching her achieve it is to be a part of her journey. I was able to be a small part of Stacy Taubman's journey in opening RISE Collaborative and seeing the community she has built has been a joy.

I first met Stacy for coffee in December of 2015. At that time, she shared with me her vision for a place for women of all ages to come together to build community, connections, and confidence. She wanted to build a pipeline of success for women and teen girls who want more for themselves and those around them. Stacy imagined something, much more than a functional place to work and meet, but a place to support other women in achieving their own success.

I was so impressed with her vision and energy that I agreed to mentor her once a month to support in her entrepreneurial journey. From refining her financial model to navigating the process of securing outside investment, I supported Stacy as she worked through the details of building out her business.

Any successful career is a long and arduous path and there are many opportunities for mistakes. Women often choose small

business, corporate paths and entrepreneurship to succeed. I've seen many capable professional women make a variety of mistakes: fail to develop their network, rely on the wrong "experts" or proceed without getting feedback and wisdom from others. People "don't know what they don't know," and that's why I have put my energy into educating women on their career paths, so they can advocate for themselves and make decisions that increase their chance for success.

It takes many and varied resources to build a community of successful, professional women. In addition to Brazen St. Louis, which focuses on growth seeking female entrepreneurs, and RISE Collaborative, it's great to have another resource for women who are striving to achieve their dreams. As an added resource, the stories in this book are important. They give you, the reader, a chance to learn from other hard-working women and hopefully, make one less mistake. Professional success depends upon making more right decisions than wrong ones—or at least making big right decisions and small wrong ones! By courageously sharing their unique journeys of missteps and lessons, failures and successes, they are making an important contribution to your success.

I am proud to have played a role in supporting Stacy along her journey to open RISE Collaborative. When women support each other, incredible things happen. I hope you are as moved by this collection of stories as I am and that you, too, pursue what you want and need in your life.

Mary Jo Gorman, M.D., M.B.A  
Chairman of the Board, Brazen St. Louis

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# Introduction

**A**t RISE Collaborative, we live by the quote, “You are the average of the five people you spend the most time with,” by Jim Rohn. We all have had that friend or family member who leaves us feeling less than or defeated. Imagine the opposite: spending time with people who not only make you feel like the impossible is actually quite possible, but they want to help make it a reality. Those are the people we want to spend time with and can make a measurable difference in our lives.

In creating RISE Collaborative—a story you’ll hear more about in the first chapter—we set out to create a pipeline for success for women of all ages. A place where women can come to build authentic community and connections. The women who join our community share a few things in common. They are ambitious and driven. They are curious and creative. They’re also flawed and unafraid to be vulnerable. And they all want to see the other women around them succeed—because when you succeed, so do they.

We all come to this community with our own experiences, wounds, successes, failures, lessons learned and goals to be met. And unlike other spaces in our personal and professional worlds, we come to this community valuing collaboration over competition. We check our “sharp elbows” at the door and open our-

selves up to knowledge, referrals, conversation, and supporting one another.

In the stories that follow, you'll hear from 17 women. Each have a story to tell about a journey that shaped them, and pivotal points that fundamentally changed the way they viewed themselves, their world, and led them to where they are today.

Wherever you are in your journey, we hope this book helps shape you too.

Stacy Taubman  
Founder/CEO

Kate Wiegmann  
Partner/COO

# Women and Wealth

## What I Learned About the Workforce & What it Means to be a Woman

**M**y first real job out of college was with a large national broker dealer. I can still remember my first interview—seeing all those fancy cars in the parking lot and brokers in their expensive suits, high-fiving each other across their desks. Right then, I knew this was the place for me. I wanted to be a broker, making money and having fun along with the rest of them. I was offered a position as a broker assistant and I took it, feeling confident I would work my way toward becoming a broker.

After working there for a few weeks, I started to see things I had initially missed. While nearly all the brokers were men, all the administrative and operational jobs were held by women. They were smart women, with extensive work and life experience, who could have held any number of professional positions.

I continued with my plan to become a broker—after all, there was absolutely no reason a woman couldn't hold that role. I inquired about joining the broker training program, only to be told I did not qualify. I did not have a “natural market” for prospects. However, I took note as one male college graduate was hired after the next, and placed directly into the broker training program. I was no different than they were; why couldn't I join the program?

I was raised to believe I was equal to men, and accomplishments didn't depend on gender, but hard work. My parents instilled in me the belief that I could do anything I chose, and a "man's job" should be no different than a woman's. I felt I had always been treated equally from elementary school through college graduation. Yet there I was, twenty-three years old, realizing the work world was different. I was somehow now considered to be less than my male colleagues.

I still remember how shocking this was. I felt as if I had been living in an egg my entire life—warm, cozy, and protected. Now, my egg had cracked, completely shattered onto the ground at my feet. All I wanted to do was reassemble my shell, piece it back together, and crawl back inside to escape from this strange new world where I did not like my pecking order.

After multiple failed attempts to join the training program, I found it difficult to come to work. I was embarrassed to be answering phones and doing menial tasks. I felt as though I was wasting my degree and my potential typing letters, while my male counterparts were launching their careers through an intensive multi-month training program. Even though I knew I was capable of more, I was beginning to doubt myself.

I looked around at the other women working alongside me. No one was talking about what they learned or what they might do next. Were they happy there? How many of them felt just like I did, but decided it was easier to consign themselves to the job at hand?

The men and women in the office seemed to be divided by an invisible fence, with plenty of gender-bashing on either side. Recognizing this, I no longer felt shame about my role. I felt anger—hot anger—and lots of it.

I began to think about finding a new job. I spoke with another brokerage firm, but once again heard that I had “no natural market.” After a tour of the office and an introduction to some of the youngest, all male associates, I was beginning to wonder about investments as a career. Could there be more here I wasn’t thinking of?

Not ready to settle, I continued my search. I began looking into opportunities at accounting firms, with departments that offered not only income tax planning, but investments, cash flow modeling, and estate planning as well. I was intrigued. I immediately sent resumes to a couple of these big five firms. After multiple rounds of interviews, I received two offers. I chose the one with a female partner who espoused education, and I never looked back.

My first day was a welcome surprise. I was given all the resources I would need for success, including a full training calendar. As I headed toward my car to go home, I felt good. Different. Taller, even. (If you’ve ever seen me in flats, you’ll know this was significant!)

Right away, I noticed the associates, managers, directors, and partners were both female and male, across a staff of hundreds of employees. What a refreshing change! Did I say I wanted training? I got my wish and then some. I was sent to conferences, took doz-

ens of online courses, read industry materials, and began studying for the Certified Financial Planner (CFP®) program.

Not only did this place look different, it was different. Everyone was expected to learn and work hard, and when you did, you were recognized. I was in the right place, part of a growing team. Having opportunity, support and resources—and being held accountable for my work—makes all the difference in the world.

Not only was I happy to be out of my shell, I was proud of myself for breaking through. I wondered, “Could I help other women do the same?”

This experience shaped my path forward. Let’s face it—the financial services industry has ignored women for decades. Not just women advisors, but more importantly, women investors.

As I continued my career, I began to realize that what I experienced as a young woman entering finance is similar to what women investors face. While women are smart and capable, the industry was designed to cater to their husbands, brothers, and fathers. Historically, what women brought to the table was not valued. And for many women, their experience in working with a financial advisor left them questioning their ability.

The financial services industry also isn’t easily adaptable to the realities of being a woman. We’re at a disadvantage from the start—earning fewer dollars than men, often due to breaks in the workforce, as well as the very real gender gap (which is shrinking but still exists). We also tend to live longer than men, prompting those questions, “Will I have enough for retirement? How do I

ensure I have extra to help support aging parents and children? Will I be okay?"

This uncertainty can take the wind right out of our sails. Working in this industry, I started to see women disengage and delegate financial management. Not only the day-to-day decisions, but the big strategic ones as well. This is when I realized it was time to swing the pendulum in the other direction. It was time to create a gender-balanced business—one that helps women build financial competency and, ultimately, confidence. One that gives women a place where their voices are heard, their opinions matter, and their unique life experiences are considered. A place where their desires and fears are placed center stage.

It all begins with the end in mind.

We all need permission to dream—to imagine what is possible in our futures. How do we want to support our communities or families? Only after we have defined our purpose, filled with significance and meaning, can we begin to figure out how money fits into this vision. Now, we are making important progress. Guess what comes next? Empowerment. Freedom. Time to unwind, reengage, and exit the work hamster wheel.

As a woman who had to build my competency and rebuild my confidence, I wanted to help other women do the same. That's why I adopted a gender lens, to build a wealth management practice for women and the men who love them. One that helps each of us understand the big picture, our motivations and our hopes and fears, and the lasting effects of our financial decisions.

I am thankful for my parents for raising me with confidence and high efficacy, believing I am worthy of success. I am also appreciative of those early experiences, as they had a profound impact on my emotions and drive.

I have come full circle. I started in this industry as a woman who was ignored, along with my peers. Now, I have the courage to live my life, true to myself and not the life others expect of me. I help women own their own financial futures, full of purpose and contentment, ready for the life each of us wants to live.

If you educate, engage, and empower a woman, then you can sit back and watch her fly. Indeed, I am enjoying the packed flight.

“She took a leap of faith and grew her wings on the way down.”

—David Brinkley





Shannon Moenkhaus is focused on helping individuals and families achieve their financial goals. Her firm, Clarity Financial Planners, is committed to providing evidence-based investing, total financial life management, and lifelong learning to empower others to have a brighter financial future. In particular, she is passionate about helping women embrace responsibility for their finances and reach their goals.

A lifelong Missourian, Shannon spent her summers with her grandparents, taking care of family and community. Her memories of delivering food and developing friendships with the residents in her family's nursing home set her values early: take care of those who put their trust in you.

Shannon has spoken on gender inequality in the workforce for the Women's Foundation of Greater St. Louis, RISE Collaborative Workspace and Women & Wealth for Washington University – Olin Business School. She has also taught financial literacy

*Continued*

and other classes for UMSL, Entrepreneurs Organization, Tiger 21, Enterprise University, BAM Alliance, and others.

She has worked with Junior Achievement, served on the board for Central Institute for the Deaf, and is actively involved with Presidents Council and Logos School.

Shannon enjoys spending time hiking, paddling and four-wheeling just outside her family's 150-year-old tiny house on the Black River.

**Shannon Moenkhaus, CFP®**

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# Afterword

The Epigraph of this book began with one of my favorite passages by Marianne Williamson. It is a beautiful passage that especially resonates with me when she taps into that universal feeling of self-doubt. Williamson writes: “We ask ourselves: Who am I to be brilliant, gorgeous, talented and fabulous?” As I navigate the early days of my career path, I have had many moments of fear and self-doubt, as I suspect you have at some point, too.

But I love that the 17 women in the book you just read chose to take William’s words to heart. Instead of giving into the temptations of fear, they ask in return, “Who am I *not* to be?”

Luckily, I was introduced to this brave way of thinking early in my career through a college internship with Stacy Taubman during the initial planning phases of RISE Collaborative Workspace. Almost every day that summer, we had coffee meetings with various impressive women in St. Louis. After each and every meeting, I left feeling inspired and honored that I got to hear their stories, some of which you read about in this book. And while I didn’t know it at the time, this internship dramatically shaped who I was and who I would become.

Most importantly, I learned that defining and growing your community is essential to your success. You cannot succeed without the women around you succeeding.

At the end of that summer internship, RISE Collaborative had not yet opened, but I knew it wouldn't be long before this dream became a reality.

Three years after that fateful internship, I have come full circle. I am now the Community Manager at RISE Collaborative and having been there from the earliest stages, I can honestly say the reality is even better than the dream. Stacy and Kate have built a community of dynamic and impressive women. RISE Collaborative has become so much more than just a place to work. Our members thrive personally and professionally being surrounded by like-minded women who encourage their career growth, and make connections which support their success. It's a place to focus on their business, host meetings, and get it all done.

At the time of this publication, RISE Collaborative's doors have been open just one year and the growth of community I have seen already has been astounding. Our nearly 200 female members are the secret to RISE's success. They all share the vision and dream that Stacy had for creating a strong cohesive community where women support other women. If you too want to become involved in RISE's growing community and learn more about our journey, visit us at [RISEworkspace.com](http://RISEworkspace.com).

Rian Edwards

Community Manager

Going further.  
Reaching deeper.  
Daring for more.

*Women on the RISE* is an inspiring compilation of stories from 17 women who weren't willing to settle. Instead, they created the careers and lives they needed to put them on a path to professional success and personal satisfaction. Their journeys all came together at RISE Collaborative Workspace, an inspiring community of female professionals in St. Louis.

In this collection of stories are tales of channeling one's strengths, changing careers, overcoming loss, supporting other women, and rising to the top. No one woman's journey was the same yet they all find themselves further ahead today than they once dreamed possible. And none of them got there alone.

Readers will be inspired by the stories of women helping women, of women asking for what they deserve and not taking 'No' for an answer. If readers believe in the power of women not only being at the table, but leading the discussion, they'll be moved by these stories.

And if readers are feeling stuck or in need of inspiration to create change for themselves and their futures, *Women on the RISE* will help light that spark. It's impossible not to feel a connection to one—if not all—of these authors and take away an idea that will inspire movement.

ISBN 978-0-9997525-0-0



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Published  
in the USA

9 780999 752500