

## Kris Taylor: Empowering Tomorrow's Leaders in Finance



*Kris Taylor's story of resilience, mentorship, and success in finance is inspiring. Discover how she's helping women rise through the ranks and excel in their careers.*

If you know Kris Taylor, you know she's a powerhouse. Based in Wenatchee, Washington, she is a fellow founding member of Stifel's Women's Initiative Network (WIN) and has been a key player in creating an environment where women in finance can really thrive at work.

Her story is inspiring. Starting her career in the early 1980s, Kris faced many of the challenges women often encounter in the industry. Fast forward to today, and she's not only built a successful career in finance but also made it a priority to help others achieve their own goals.

### **A Career Born from Determination**

Kris's entry into the financial world wasn't easy. But rather than being discouraged, Kris saw these challenges as opportunities to prove herself.

"I remember looking around and realizing there weren't many women in the room," she recalls. "I'd often be the only one, but I used that as fuel. I didn't let it deter me. I wanted to prove to myself and everyone around me that I could excel in this

space. It was tough, but it made me more determined."

Those early experiences really shaped Kris's leadership style, teaching her just how important resilience and persistence are. One of the key things that's driven her success has been the mentorship she's received along the way.

"I wouldn't be where I am today without the support of my mentors," she says. "I had people who believed in me when I wasn't sure I could do it myself."

Kris feels strongly about giving back, and she's made it a priority to pay that support forward. She's especially passionate about mentoring younger women just starting their careers.

"When we launched WIN, the goal was to create a space where women could feel supported, not just as professionals but as people. Balancing work and life is hard, but having a network that understands what you're going through makes it a lot easier."

Kris's approach to mentorship isn't limited to the women in WIN. She has extended her guidance to everyone in her team, creating a culture of collaboration and support.

"I've always felt that leadership is about lifting others up. I'm not here just to make myself look good – I'm here to help my team succeed. That's what true leadership is, and I try to instill that in everyone I work with."

Her approach ensures that no one is left behind.

"I don't just want to lead from the top; I want to be hands-on with my team. I make sure they know I'm always available to offer advice or just be a sounding board. My success means nothing if I can't share it and help others grow."

### **Striking the Right Balance**

Kris's journey in finance hasn't just been about achieving

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personal milestones – it's also been about creating lasting connections. A big part of this has been her close working relationship with Roxanne Bryant, a fellow long-time Stifel financial advisor and branch manager at Wenatchee.

"I've had the privilege of working alongside Roxanne for many years," Kris shares. "We started our careers around the same time and faced many of the same challenges. We've supported each other through the years, especially when it came to balancing our careers with family life, and we've worked together to break through the barriers women often face in this industry."

Early in their careers, when both were raising young children, they found practical ways to support one another, sharing responsibilities and covering for each other when needed. Their camaraderie became the foundation of their professional growth.

"I'd be remiss if I didn't mention Roxanne," Kris adds. "She's been a huge part of my journey. We've worked together for years, and now we're both focused on helping younger women and men in finance move into leadership roles."

Like many others, Kris knows firsthand the challenges of balancing a demanding career with family life.

"When I started my career, I was juggling so much – working long hours and trying to be present for my family," she shares. "At first, I thought I had to do everything perfectly at work and home. But over the years, I've learned that balance isn't about perfection; it's about making the best choices in each moment."

A big part of finding that balance has been learning to set boundaries.

"I used to think that saying 'no' would hurt my career, but I realized that protecting my time was essential. It's about being strategic with how I spend my time, both at work and at home," she says. "Learning to say 'no' was liberating. It's less about

rejecting opportunities and more about focusing on what truly aligns with my goals."

Her support system, including her family and colleagues at Stifel, has also played a huge role in helping her manage it all.

"I can't overstate how much of a difference Stifel's environment made for me. It's like they've really got your back. I found myself surrounded by people who wanted me to succeed, and it made all the difference. I remember walking into my first big meeting with the team, and everyone was genuinely interested in my perspective. That kind of support is rare."

Reflecting on her career, Kris credits Stifel's culture for allowing her the independence to grow while still providing the support she needs.

"When I came to Stifel, I immediately felt like I was part of something special. There's a real commitment to helping advisors grow, and that was incredibly appealing to me," she says. "Having the flexibility to build my practice my way while knowing I can access all these resources when needed has been a game-changer."

### **Planting Seeds for the Future**

Kris believes that mentoring is about more than just giving advice in the moment – it's about planting seeds that will eventually grow into something much bigger. Over the years, she's learned to recognize potential in others, even if it's not immediately obvious.

"You never know where you'll find that next great talent. That's why I always say, 'Plant seeds everywhere.' You never know where they're going to take root and grow."

This mindset has shaped Kris's approach to mentoring and developing leadership within the industry. She's always on the lookout for opportunities to share her knowledge and inspire others to carve their own paths.

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"A single conversation, a small act of encouragement, or sharing your story can inspire someone to take that next step," she says. "It's all about giving them the space to discover their potential."

Kris is especially passionate about helping the next generation of women in finance. Drawing from her own experiences as a woman in a traditionally male-dominated industry, she shares advice that has guided her journey.

"First and foremost, don't be afraid to take risks," she shares. "When I started, there weren't many women in the industry, and it was tough. But if you put in the effort and stay true to your values and draw on your strengths, success will follow."

She also emphasizes the importance of stepping into leadership roles, even when they seem out of reach. Reflecting on her journey, she recalls a moment earlier in her career as a financial advisor when she was offered the opportunity to be the Branch Manager while continuing to build her own business.

"I jumped at the chance to lead, despite the challenges of raising two young children and managing a growing business. I knew I had to be more organized, delegate more to team members, and be more efficient," she explains.

This opportunity, combined with insights from her MBA background, transformed her approach to her team's

processes, helping them stay focused on the "essential" tasks required to serve clients effectively.

"Don't wait for permission to lead," Kris advises. "Take initiative, be vocal about your ideas, and always be prepared to advocate for yourself and others. You don't need anyone's permission to make an impact."

For Kris, the key to helping those around her succeed is about creating an environment where they can thrive rather than just survive.

"I want to make sure the next generation doesn't have to face the same challenges we did," she says. "WIN is more than a network – it's a space where women can collaborate, share knowledge, and build confidence together."

Kris is proud of the progress WIN has made, but she's far from done.

"There's still more work to do. I'm committed to advocating for more women in leadership roles and continuing to create a space where women can reach their full potential."



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