

WOMEN & INVESTING CLIENT EVENTS:

Empowering female clients through education

32% of women find it challenging to find reliable information about investment products.

New York Life Investments recently commissioned a survey of women investors to better understand what this important demographic is looking for from their financial advisor and their investments. Our research showed that women are interested in learning more about the market and investment opportunities. Specifically, we found that 44% of women are not confident in their knowledge of the market and 29% are not confident in their ability to make investment decisions. Over 40% of women expressed interest in participating in in-person education events.

Drawing upon our research, New York Life Investments has created a series of turnkey events that you can host to help female clients and prospects increase their investing literacy. New York Life Investments can help you with the event logistics.

Topic menu

Below is a list of proposed topics for your event.

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| <p>Investing 101</p> | <p>Have you been scared to invest or avoided investing because you didn't know where to begin or how to sift through all the financial jargon? Well, fear no more! At this event, you'll learn important basics such as how to get started and how to take charge of your assets.</p> |
| <p>Investing 201</p> | <p>We know why we should invest, and we understand the concept of stocks, bonds and asset allocation. What should we focus on next to meet our financial goals? Taking the time to familiarize yourself with what you know and do not know will afford you the opportunity to be more engaged with your investment planning and feel more confident about your finances.</p> |
| <p>Are you financially fit?</p> | <p>This beginner's crash course explores the concept of financial health. We'll discuss the importance of goal setting and having destinations for your financial life; how much you should be saving every month and how to save; what a healthy credit score is and how you can keep it healthy; your fixed costs every month and what they should be, based on how much you make, your investment accounts beyond retirement and finally, how you can pull this all together with a financially healthy mindset.</p> |
| <p>Preparing your finances for uncertain times</p> | <p>Dealing with uncertainty can be a challenge for most people. While no amount of preparation can fully brace you for the shock that occurs with the loss of a job or other unexpected events, planning ahead can put you in a better position to handle it. This seminar outlines ways you can prepare yourself financially for the unexpected.</p> |
| <p>Spring clean your finances</p> | <p>You usually clean out your closet or home every spring... but have you ever spring-cleaned your finances? This event will talk about the importance of doing a full review of your finances every year, what areas you should be focused on the most, and how to set yourself up for financial success for the rest of the year.</p> |

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| <p>How to talk to your parents about their finances</p> | <p>If something happened to your parents, would you be able to step in and help them with their finances? Do you know where they bank or how they pay their bills? Do they have wills? Have they named you power of attorney so you can step in to manage their finances if they can't? You need answers to all of these questions and more before a crisis strikes. In this training, you'll learn how to have critical conversations with your parents about their finances, what information you need to gather, and what to do if they won't talk.</p> |
| <p>Putting the "I" in involvement</p> | <p>Taking ownership of your financial well-being is a powerful notion but taking the first step in the process can be challenging. Finding the right financial support team is paramount to long-term financial success, but like any strong partnership it needs to be a two-way relationship. This presentation will discuss five key drivers that can maximize your relationship with your financial advisor.</p> |
| <p>Couples & finance</p> | <p>Studies have shown that money is the number one issue married couples argue about¹. Talking about money isn't easy, commingling finances can be scary and working together to achieve goals can cause conflict. However, doing all of these is certainly necessary and worth celebrating once you do! This seminar discusses some key concepts to helping you navigate financial discussions with your spouse.</p> |
| <p>Real estate 101</p> | <p>Owning real estate is a goal for many Americans. Some view the purchase of a home as the "American Dream" while others see real estate purely as an investment. Regardless of your view, there is a lot to know about the world of real estate before you make your purchase. This seminar provides you with the basics.</p> |
| <p>Raising financially savvy kids</p> | <p>Building a foundation of financial literacy early on will provide your children a path to financial freedom for their future. Oftentimes we do not know how and when to start the conversation. Begin with simple concepts and encourage your children by celebrating their success. This seminar provides ideas on how to approach your children about finances from age five all the way through college.</p> |
| <p>ESG: The next evolution of investing</p> | <p>ESG investing has garnered a lot of interest over the past decade and is now part of common investment practices. But there can be a steep learning curve before feeling comfortable implementing ESG into your portfolio. This seminar will give you a foundation to start.</p> |
| <p>How to create a healthy money mindset</p> | <p>When you think of your financial situation, what emotions come to mind? For most there tends to be an inherent emotional reaction when it comes to thinking about money. Recognizing those emotions and the past experiences that bring you to those emotions is a crucial step in creating a healthy money mindset.</p> |

1. Source: 2017 study by Dave Ramsey solutions: "Money, Marriage and Communication": <https://www.daveramsey.com/research/money-marriage-communication>



INVESTMENTS

For more information

888-474-7725, option 1, followed by option 2

Insights presented above are derived from a 2018 study conducted by NY Life Investments in partnership with RTi Research and Sub Rosa. The study employed both qualitative and quantitative methods to better understand the needs of women when it came to investing in the U.S. (Sample size: N=32; N=800 respectively). The information contained herein is general in nature and is provided solely for educational and informational purposes. New York Life does not provide legal, accounting or tax advice. You should obtain advice specific to your circumstances from your own legal, accounting and tax advisors.

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