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Q&A: WEALTH MANAGEMENT FOR WOMEN

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Q: What are some of the greatest challenges facing women investors?

A: Some women are exceptionally savvy in their careers, yet they may not be focused on their money, or what their money can do for them and their families. So we talk about their goals, challenges and fears. We develop a clear financial plan that empowers them to connect to their money and to their future.

Q: What financial question do you hear most frequently?

A: "Am I going to have enough to live on?" While that's tough to definitively answer, we have a conversation to create clarity and reduce fear around this major concern. Each client deserves and receives our complete attention and expertise as we create a personalized plan that is essentially a "path" to their future. Regardless of their stage in life—married, divorced, single or widowed—they want a secure future; we work every day to make that happen.

Q: What factors make retirement planning different for women?

A: Women live longer than men, and historically make less over their lifetime. They tend to be out of the workforce

Photograph by Scott Kwak

more frequently than men. Their Social Security income tends to be less, and their long-term-care needs are often greater. We look at the statistics and risks, but we spend more time connecting with each client. We know we have done our job when they tell us they have a better understanding and are excited about their future knowing that we are managing their portfolios.