HAVERFORD

SPEAKER SERIES *for* WOMEN®

Financial Literacy Workshop II

Thursday, November 2, 2017

Join us for an educational working lunch where we will delve into financial literacy basics and preparedness. In this choose-your-own-track format, you will have the option of attending two different sessions according to your level of knowledge and interests. Topics were selected based on your feedback, so be prepared to learn!

Philadelphia Country Club, Gladwyne

11:30 a.m. - 12:00 p.m. - Registration & Networking

Buffet lunch will be served

12:00 p.m. - 12:50 p.m. - Session 1: Investment Knowledge

1:05 p.m. - 1:55 p.m. - Session 2: Applying Your Knowledge

To Register:

haverford.cvent.com/literacy

610.995.8758

events@haverfordquality.com

Session 1: Investment Knowledge

Topics in this session focus on the fundamentals of investments, with options for beginner and intermediate level investors. Choose one of the two options below:

Stock Market Basics

Christine Walker, CFP®, CIMA®, *Vice President & Portfolio Manager*

For attendees seeking an introductory level course, this session will explore the basic components of owning stocks and provide a general understanding of the stock market.

Understanding Investments

Maxine Cuffe, CFA, *Senior Research Analyst*

For attendees that already have familiarity with stocks and bonds, this session will build upon that knowledge and discuss how stocks are traded and bond portfolios are constructed. It will provide an introduction to options, examine the differences between ETFs and mutual funds, and explain bond duration and maturity.

Session 2: Applying Your Knowledge

In the second session, learn how this fundamental knowledge can be applied practically to your own life by choosing one of two options below:

Ages, Stages, and Essential Pages: Estate Planning at Every Age & Stage of Life

Suzanne Hecht, Esq., *Partner,* Haney & Hecht

Do you think estate planning is only for those nearing retirement? Think again. Everyone needs basic estate planning documents at different ages and stages of life to address a variety of situations you or your loved ones may face. Suzanne will use her practice area expertise to help sort out the basic estate planning tools, what purpose they serve, as well as when and why you need them.

The 3 R's of Respecting Your Money

Lydia Holiat, MBA, *Vice President & Portfolio Manager*

Navigating your monthly financial statements can be a challenge. Understanding what you're looking at and knowing the right questions to ask can help you better understand your overall financial status. This session will teach attendees about Reading monthly statements, Rebalancing a portfolio, and Reviewing questions to ask a trusted advisor, which will provide a simple plan for taking control of your finances.

EDUCATING, EMPOWERING, *and* INSPIRING WOMEN