



**CFA Society  
Austria**

## **Lunch Presentation**

**Barbara Stewart, CFA**

**Partner, Cumberland Private Wealth Management Inc.**

### **"Future of Women & Finance"**

**Tuesday, 3 November 2015, 12:15 p.m.**

**Kathreinbank, Wipplingerstraße 25**

**1010, Vienna**

<i>12:15 p.m.</i>	<i>Registration</i>
<i>12:30 p.m.</i>	<i>Barbara Stewart, CFA will talk about "Future of Women &amp; Finance" Followed by Q&amp;A</i>
<i>13:15 p.m.</i>	<i>Lunch Buffet</i>

**Rich Thinking: Research Findings 2015**



Please join Barbara Stewart, CFA, author of the Rich Thinking series of white papers on women and financial issues, as she explores the research findings from her fifth and final study, entitled The Future of Women and Finance. The report is being launched globally in celebration of International Women's Day. Barbara's talk starts out with a quick review of her key findings from the past four years of white papers. When it comes to women and money: 1) actions speak louder than words; 2) women learn through stories; 3) women invest in causes and concerns that matter to them; and 4) smart women get started investing.

As part of her 2015 Research, Barbara interviewed 50 global leaders, both men and women, to uncover five broad themes for the future of women and finance:

1. **The new target market is the financially confident woman:** Barbara will describe the financially confident women, what she looks like, how she's different from women in the past, and how your marketing plan needs to change to meet her demands.
2. **We will all be feminists in business:** What is a feminist? Barbara will talk about the new definitions of this loaded word; how this new trend will affect your company, and what changes need to be made.
3. **The new business equation: more women = more money:** Women are earning more money, controlling more money and making more financial decisions. Barbara will tell you how you can capitalize on this opportunity.
4. **Earn respect from women through transparency and trust:** Trust and transparency have always been important, but Barbara will explore some of the ways in which women think about these issues that might be different.
5. **Technology changes everything: sharing, mobile & data:** Mobile has changed the way we do business, and women 'get' social media. Barbara asks: does your company have a Chief Social Officer? Is she a woman? If not, why not?



These are just some highlights, but the full talk has deeper dives on all of these issues, featuring insights from male and female thought leaders around the world, and Barbara's unique approach to putting it all in language that welcomes both women and men; senior executives or more junior workers hoping to learn; and both those with a corporate focus as well as those who are looking for personal insights. Barbara's talk is especially useful for young women 16–34, who are just getting started on their own financial journeys.