Rich Thinking® –
Financial Advice Hotline

I am setting up a hotline that will offer objective, confidential advice on finances and investing for women via half hour Zoom conversations…for free. Why? Three reasons: there seems to be a real need for it, I plan to use what I hear to help make my research better…and although I was supposed to be doing a contract research project this spring, it was deferred, so I now have the time!

Since March I've received dozens of emails and calls from women seeking my advice on a wide variety of issues related to their financial situations. They want to talk about things they might not feel comfortable discussing with their advisor or their spouse, or they might just want help finding sources of information for their family. With no judgement or jargon. A few real world samples:

> *"My mom is an MD and managed her own investments for the past decade, having been disappointed by her experience with advisors. She's now looking for someone to manage her investments but is struggling in this search. Can you help?"*

> *"My advisor is suggesting that I invest in pooled funds. I'm skeptical: They promise to offer opportunities the average investor doesn't have. They are everywhere. Are they that good?"*

> *"My 26 year old niece is interested in becoming more financially literate and starting to save, then invest. Can you recommend a good book/tutorial that would explain the products (mutual funds, ETFs, fees) that I could buy for her to get her started?"*

> *"My advisor of eight years seems fine…but are his picks good, or just lucky because the market had been running up for a few years? Can you give me your opinion on my portfolio holdings?"*

This will be a win/win: you get a free 30 minute confidential Zoom chat (including daughters if you want!) offering an independent, unbiased perspective on your financial situation with no sales pitch! In exchange, I get to use the anonymized data that will come from these conversations to make *Rich Thinking* even better.

Email me to book your Zoom discussion: barbara@barbarastewart.ca

Barbara Stewart *is a Chartered Financial Analyst with more than two decades of experience as a portfolio manager investing on behalf of high net worth entrepreneurs.*
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