

RICH THINKING: HOW SMART WOMEN INVEST

Barbara's talk is based on the key findings of her research on how smart women get started investing. This information will be greatly valuable to anyone in the investment or financial services industry who works with female clients and prospective clients. And probably relevant for a lot of male clients and prospects too!

Part 1: Women invest in causes and concerns that matter to them.

How are smart women spending their resources of time, energy and/or money?

Women are not necessarily waiting for retirement to begin pursuing the interests that they are passionate about: many are defining, creating and financing their dreams now. And traditional asset mix charts do not tell that story: 'investing' can take many forms, not all of which show up on a balance sheet. The majority of women are deeply engaged in the pursuit of various personal causes and how they allocate their time, energy and money is almost always aligned with what matters most to them.

Part 2: Smart women 'get started' investing.

Barbara explains the importance of getting clear on whether or not you are interested in doing your own investing. Do you want to do it yourself? Reflecting deeply on this question is key to future investing success. If you aren't so interested, maybe it would be better to find someone you trust to do it for you? Either way, smart women just get started.

Part 3: Technology changes everything: sharing, mobile & data.

Barbara shows how we can use technology to open up investment opportunities, enhance the investing process and make it more fun! The world of financial education has been rapidly evolving and Barbara shares some of the most innovative and exciting current global initiatives.