

WOMEN INVESTORS CLUB

WIC x Barbara Stewart

Title: *CFA, researcher and author*

Theme of the interview: Goals and Managing your money

Time: Thursday 8/10 at 8:30am (30-40min)

Zoom ID: 926 1012 7427

<https://zoom.us/j/92610127427?pwd=ei92MEcrK2t3U2O0dzVleHJtZjY4Zz09>

Password: WICxBS

Questions

- **Goals and Managing your money**

In your opinion, how important is having goals when managing your money?

For the purpose of your Rich Thinking research, you interviewed a large range of women from all around the world on their finances. Could you share with us the top 3 highlights of your research when it comes to managing your finances?

Based on your experience and your research findings, what would be your 3 main tips when it comes to managing your finances?

- **Portfolio management**

Based on your experience and your research, what are your thoughts about diversification when it comes to portfolio?

What are the top 3 tips you would give to women looking to develop their portfolio?

Is there something you would like to say to the women of our community?