



P.U.R.S.e.S.SM

SM

*The Premier Financial Workshop for
Women Ages 50 & Over*

Speaker



JUDY SHAW

Women of all ages are beginning to realize the importance of being informed and becoming actively involved in securing their financial futures. This informative and fun workshop is specifically designed to address the financial issues faced by women ages 50 and over.

Learn The Six Simple Principles of
P.U.R.S.E.S.

- P** – Purpose Based Planning
- U** – Understanding Money Basics
- R** – Resources Available
- S** – Stages of Life
- E** – Empowered for Decision Making
- S** – Security System For Your Assets

Topics Will Also Include:

- Common Financial Mistakes Made By Women
- Financial Differences Between Women Who Are Single, Married, Divorced, or Widowed
- Making Money Last A Lifetime
- Avoiding Unnecessary Taxes
- Understanding Important Estate Planning Documents
- The Four Financial Phases of Life
- Dealing With Long Term Care Concerns
- Dangers of Joint Tenancy With Children
- Efficient Ways of Passing Assets To Heirs
- Charitable Giving Strategies
- Latest Social Security Forecast

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A Fun and Informative Workshop for **Women Only**

For more information, contact
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