THE NEWMAN GROUP
of Oppenheimer & Co. Inc.

# Women & Wealth at Work

*Workshop Offerings*

**www.oppenheimer.com/thenewmangroup**

### Money 101 – 5 Steps to Build Your Financial Foundation

Feeling overwhelmed when it comes to managing your money? Between work, family, friends, and everything else we do, financial matters can slip through the cracks. We will provide 5 steps to get you back on track:

- Getting organized
- Creating a budget
- Your annual financial check up
- The basic tenets of investing
- How to protect yourself and your loved ones

### Cut the Bull, the Bear Basics of Investing

While investing takes time & discipline, it doesn't have to be overwhelming. This workshop will peel back the onion layers on investing. Topics include:

- The fundamentals of investing
- What is your money needed for? How to create investment goals.
- The appropriate amount of risk for your portfolio

**Cynthia D. Newman, CRPC®, CRPS®**
Senior Director – Investments
(212) 667-4159
Cynthia.Newman@opco.com

**Morgan Newman**
Director – Investments
(212) 667-4160
Morgan.Newman@opco.com

**The Newman Group of Oppenheimer & Co. Inc.**
Chrysler East
666 Third Avenue,13th Floor
New York, NY 10017

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## Discover Your Money Story

Each of us has a unique money story that affects our financial decisions in ways we don't even realize. By discovering our money story, we can gain a deeper understanding of our relationship with money, and change any behaviors that might not be serving us well.

## Cracking the Code on Your Retirement Plan

Women face unique challenges leading up to and during retirement, including unequal pay, increasing longevity and higher healthcare costs. It's more important than ever to establish and contribute to retirement plans, as pensions become less common and Social Security doesn't often cover living expenses. This program will explore what to consider when funding your retirement plan, including:

- How much should I be contributing?
- Should I be making before or after tax contributions?
- How do I invest to achieve my retirement goal?
- What do I do with old retirement plans?

## Estate Planning is for Everyone!

An estate plan is a map. This map reflects the way you want your personal and financial affairs to be handled in case of incapacity or death. This presentation will help you create control over your property and help make sure your wishes are clear to avoid family conflict. Topics of discussion will include:

- What documents you need
- How to title accounts
- The benefits of gifting

## A Smart Start to Social Security

Learn about how and when to start receiving your social security benefits.

*Our team is available to provide valuable information to learn while you earn.*
*Please contact us to create a customized program for you and your teams.*

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