

ACE Academy Women in Wealth

Invitation Only: May 16, 2022, 12:10 – 2:45 CT (with lunch)

Hosted by the Investments & Wealth Foundation

Women in Wealth Lunch and Dialogue

Women in Wealth is an educational program series and a community for women practitioners to learn from peers and subject matter experts. Programs are developed by women for women. The theme of the annual Women in Wealth ACE Academy lunch program is Planning, Wealth & Retirement. Join subject matter experts and your peers for an interactive program featuring thought leaders from four featured firms presenting the following topics with table dialogue:

- Women, Retirement & Longevity, the Double-edged sword
- Investing Considerations for Women in Wealth
- Financial Planning for the Independent Woman
- Wealth Management for HNW Women

Each Round, Speaker presents a 15 min “Micro-Presentation” followed by table topics (questions) for 15 minutes of table discussion.

Program	Speaker	Description
12:10 - 12:30p	<i>Women in Wealth Lunch & Networking</i>	
12:30 – 12:45p	<i>Welcome Comments & Program Kickoff</i>	<i>Dorothy Bossung, Christine Gaze, and Libet Anderson Officers of the Investments & Wealth Institute Board of Directors</i>
Round 1: 12:45-1:00p	Retirement, Women, & Longevity, the Double-edged sword	<i>Maddi Dessner, CFA Head of Global Asset Class Group, Capital Group</i>
Round 2: 1:00 – 1:15p	Investing Considerations for Women in Wealth	<i>Jean Heath, CIMA® Managing Director, Head of Asset Manager Network, Envestnet</i>
Dialogue: 1:15 – 1:30p	Strategic Dialogue: Two Questions	
Round 3: 1:30 – 1:45	How we Connect: Women in Investing	<i>Milissa Hutchinson, CAIA Channel Head, Strategic Relationship Group, Macquarie Asset Management</i>
Round 4: 1:45-2:00	How to Create a Niche: 3 Key Components to Mastering your Market	<i>Liz Lenz, AIF®, RCC™ VP, Coaching & Advisor Productivity, Raymond James</i>
Closing 2:00 – 2:30p	Strategic Dialogue: Two Questions	<i>Dorothy Bossung, Christine Gaze, and Libet Anderson Officers of the Investments & Wealth Institute Board of Directors</i>
2:30 – 2:45	Synthesis: What one idea are you taking home with you?	<i>Christine Gaze</i>



The purpose of the THRIVE Center for Diversity & Inclusion is to foster a profession where financial advisors from all backgrounds THRIVE, thereby fostering a more diverse and sustainable workforce within the profession. THRIVE programs offer educational resources via a community platform and program series designed to provide insights, practical applications and roadmaps for success. *Women in Wealth* is an educational program series and a community for women practitioners to learn from peers and subject matter experts. Programs are developed by women for women.