

Women & Investing

Partial Sample of Client Presentation

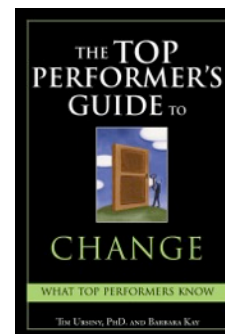
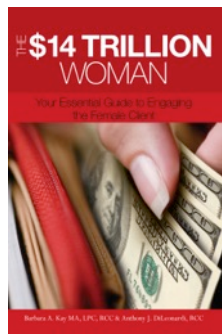
Contact Barbara Kay Coaching for more information

BARBARA KAY COACHING



Barbara Kay Coaching

Productivity
Teams
Clients
Change
Leadership



Business Psychologist, Productivity Coach and Author of two books,
The Top Performer's Guide to Change and *The \$14 Trillion Woman*.
Barbara works with:

professionals/teams
financial-services organizations
industry partners



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Agenda

1. Women Past & Present
2. Opportunities Today
3. Good Partnerships



Women of the Past



Women Today

1951: Only 23% of wives worked at all

Now: 73% women work full time

51% of all managers & professionals

62% of all auditors & accountants

1970: Women earned only 6% of family income

Now: 48% of educated mothers earn more than husbands

“Affluent” women up 146% (2X men) 2000-2009

40.2% of private businesses women owned



Women Today

Have Control & Power:

Women control 51.3% US wealth

79% of affluent couples **are dual earners**

95% of wives make financial decisions

Control the \$\$: 57% investments 60% taxes

Lead the Next Generation

Women will inherit 70% of \$41 Trillion

Women lead in teaching children about \$\$ (90%)

Women now top educated B 57% M 63% D 53%



Women Today



Yet...Challenges Remain

90% of women will have sole responsibility during their lives

Baby-boomer women likely outlive spouse by 15 years

82% need help (only 18% feel prepared to make decisions)

64% are behind in prepping for retirement

62% of women do not work with a financial professional

57% have a strong fear becoming “*Bag Ladies*”



How did that happen?



What's this like?



Getting Help



How we Search

More:

- ✓ Questions
- ✓ Stories about life (less lists)
- ✓ Discussion based deciding
- ✓ Comparison “shopping”



How we Partner

- ✓ Trust
- ✓ Partnership
- ✓ Practical Focus
- ✓ Confidence & Security



Today's Partners



Building a Good Partnership

5 Important Things to Ask:

- ✓ How
- ✓ What
- ✓ Clarifying
- ✓ Where
- ✓ How



Building a Good Partnership

5 Important Things to Share:

- ✓ Explain
- ✓ Share
- ✓ Discuss
- ✓ Clarify
- ✓ Understand



DIY



Professional Advice



Professional Advice



Big Value of Advice



More on Track

77% of women w/out an Advisor are behind

More Confident

64% w/ an Advisor confident vs. reward (41%)

More Tools

Use more financial tools & resources

More Savings

Save more \$\$ are better prepared

More Value

Women use it and get value





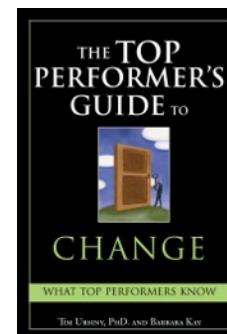
Final Thoughts

- ✧ Embrace Opportunity
- ✧ Get Help
- ✧ Enjoy Support



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