

When

Wednesday, Jan 30
4:00 – 7:00 pm

Where

Bank of America
9 West 57th Street
Training Room 2M (Mezzanine)
(Between Fifth and Sixth Avenues)

Cost

\$25 Members
\$32 Non-members

Many women have achieved great success in their careers. Yet they have not addressed their own financial futures, so they may enjoy the fruits of their labors. This workshop is presented for those women willing to make a real commitment to immerse themselves for several hours on topics that are crucial to their financial health. These will include: setting financial goals; life, health and long-term care insurance; what to do if you divorce; how to save for your child's education; tax planning; retirement planning; estate planning; and much more.



In this highly interactive session, you will be supplied with a workbook with exercises to complete during the workshop that will help translate concepts into a reality based on your unique circumstances. The workbook provides substantial information and is yours to keep.

It isn't easy to focus on what you need to do to ensure your financial health. This workshop will help you take control of your financial life to avoid the inevitable regrets and potential hardships later if you do nothing now.

We will have a distinguished trio of facilitators.



Katherine Sayer, CLU has been a financial services professional for over twenty years. Her practice focuses on estate, business and retirement planning, working primarily with individuals and small business owners to help protect their money and establish financial security for them and their families. She has spoken on financial planning to many organizations, including the New York State Society of CPAs, and has led seminars for the Real Estate Board of New York, various real estate firms and physicians groups. An NYU graduate with a math major, Katherine serves on the Charitable Board of the Association of Real Estate Women and the Planned Giving Committee at Central Synagogue.

Michael C. Brown has been a managing director at Banc of America Investment Services and The Private Bank since 2003. With over 25 years of experience covering the ultra high net worth market, Mike has a particular expertise in restricted and control securities and hedging concentrated equity positions. Mike joined the Bank in 2001 as sales manager at Banc of America Securities Private Segment business from Bear Stearns, where he was managing director of the Special Equity Transactions Group since 1991. Former positions include head of Private Asset Management at ING Barings and EVP of Artisan Investment Management. Mike holds a BA from Columbia.



Aleena (Lee) R. Shapiro is an attorney specializing in trusts and estates, tax and mid-size businesses. Lee has written numerous articles on legal issues and has taught and lectured at programs of the NYU Law School Summer Tax Institute, the New York State Bar Association and the Association of the Bar of the City of New York, among others. She currently serves on the Trusts, Estates and Surrogates Courts Committee of the Association of the Bar of the City of New York. An FWA member, Lee received a JD from NYU Law School where she was an editor of the *Law Review*. She also received a Master of Law in Taxation from the NYU Law School.

Special thanks to Bank of America for hosting and underwriting this event.

Reservations Required -- Bring Photo ID -- No Walk-Ins

**Taking Control of Your
Financial Life**

Jan 30, 2008

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***** Online Registration *****

Registration and payment by credit card or check is available from the FWA website. Visit www.fwa.org and link to the Event Calendar to view upcoming events. Select the Online Registration button from the event description page to register.

Contributions or gifts to the FWA of New York, Inc. are not deductible as charitable contributions. However, they may be deductible as ordinary and necessary business expenses. By registering for and attending this event, you acknowledge that any photographs that may be taken are the property of the Financial Women's Association and give your consent to their use in the FWA's online and offline business communications and marketing.

Reservations/Cancellations and payment must be made by Monday, January 28, 2008.