



UPSTATE

Women in Finance

May 4, 2023 | Rochester, NY

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Program of Events	Time
Networking & Luncheon	12:15 - 1:00 PM
Opening Remarks	1:00 PM
Panel	1:10 PM
Break	2:50 PM
Speaker	3:00 PM
Closing Remarks	3:40 PM
Networking & Refreshments	3:45 PM - 4:30 PM



By 2030 American women will control a majority of the \$30 trillion in baby boomer assets—a wealth transfer that approaches the annual GDP of the United States.

PANELISTS AND SPEAKERS



The Power of the Female Economy

A panel discussion moderated by
Kitty Bressington

The opportunities for women to achieve financial strength and independence are improving due to demographic, economic, social and technological changes. At the same time, women are disproportionately impacted by the current inflationary environment and are recovering from pandemic labor effects. Women approach and prioritize their finances differently than men, but most financial products and services do not recognize these differences. We also see generational differences in savings, investments and purchasing power among women with implications for the financial services industry.

We will discuss the differences in women's economic profiles and ways our industry can pivot and adapt to women's needs. Our panel includes women representing different facets of financial services in the Rochester area.



Megan Norris, PhD, Executive Director
ACT Rochester

*An Initiative of the Rochester Area
Community Foundation*

A Rochester native, Meg earned her Master's Degree from the University of Rochester Warner School of Education in Educational Policy, analyzing parent engagement in the Rochester City School District. Her Ph.D. in Sociology at Brown University focused on social inequality and the intersection of schools, families and neighborhoods. Prior to ACT Rochester Meg has worked with state education agencies and several foundations.

ACT Rochester provides an objective assessment of the area's nine-county regional performance on key indicators of well-being. Its website is a "one stop shop" for data and analysis, over 100 indicators, as well as links to more than 300 community initiatives and resources. www.actrochester.org

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and the Foundation for Women's Financial Education.**

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TODAY'S EVENT IS PRESENTED BY:



Foundation for Women's Financial Education is a non-profit organization dedicated to making a positive impact by increasing women's financial security. By offering unbiased financial education, women gain knowledge about financial matters—the key to a lifetime of financial wellbeing and independence.

The Foundation offers financial seminars and workshops to empower women to seize control of their financial well-being. Sharing knowledge, experience, and quality, product-neutral information and education, we promote a space where women can fully explore their financial situation without judgment.

UPCOMING EVENTS:

- **Second Saturdays:** A divorce advice workshop for women to help explore the legal, financial and personal issues of divorce.
Dates: Second Saturday of each month, 9:00 AM - 1:00 PM
- **Where there is a Will, you are the way: Executor & Trustee Primer**
Date: May 18, 2023, 6:00 - 7:30 PM
- **Managing Your Credit & Credit Report**
Date: June 15, 2023, 6:00 - 7:30 PM
- **What Every Woman Should Know About Her Partner's Money**
Date: August 17, 2023, 6:00 - 7:30 PM

We can provide custom Courses and Seminars
for your organization or clients
Contact the Foundation to learn more

📞 585.613.8290 ✉ foundation@womensfinancialeducation.org
www.womensfinancialeducation.org

Mark Your Calendar



To help us plan for next year's event, please complete and turn in your survey cards. We appreciate your feedback in helping us make our next event a great success.



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the event for the Foundation
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FINDING INDEPENDENCE IN
OWNING A HOME!

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2022 ANNUAL REPORT



EDUCATION IS THE HEART OF WHAT WE DO

In 2022 we updated our course catalog and re-started seminars on the third Thursday of each month. A retirement course was presented to the Monroe County Library System and a financial planning series was developed for town recreation departments.



WE SUPPORT WOMEN IN FINANCIAL AND EMOTIONAL CRISIS

The Foundation supported 13 women in 2022 at our [Second Saturday Divorce Workshops](#). Support continued through the pandemic with 22 women served in virtual workshop sessions in 2020-21. Over 90 hours of pro-bono financial planning services were offered in 2022.

PROVIDING A RESOURCE FOR WOMEN IN FINANCE

Our annual [Women in Finance](#) event returns on May 4, 2023 after a three-year hiatus. Discounted tickets are available for finance students in the Rochester region.



NOTES

CONTACTS & CONNECTIONS