



# Savvy Women Club

"Helping Smart Women Become Investment Savvy"

It was my upbringing that inspired my passion for empowering women to manage their wealth. Growing up, my parents regularly enjoyed open conversations about money, budgeting and savings. While my Dad was the breadwinner, my Mom spearheaded the investment decision-making and actively ran the household budget. Over the years I learned that my childhood experience was somewhat unique, and that the financial services industry had missed the boat by not recognizing the value and unique concerns of the female client.

I invite you to join us for our next *Savvy Women Club* event to deepen your investment knowledge and increase your financial confidence.

**Learn more about the SWC at [paulachesser.com](http://paulachesser.com).**

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## Three Ways Female Boomers Become Money Savvy

**W**e may be our mother's daughters in many ways, but as Boomers our lives are far more complicated. We have taken on a multitude of new responsibilities in life and while we excel at most things, many continue to struggle to manage their financial affairs. As a female wealth advisor, it is abundantly clear to me that the financial services industry has missed the boat by not recognizing the value and unique concerns of women.

I've watched countless women come into my office on the heels of a life-altering event: job change, divorce, loss of a loved one or even inheriting a large sum of money. More often than not, they are reeling from the emotional effects of this event and struggling to understand how it will impact their financial life. And while it may seem difficult to imagine yourself as one of these women today, my advice is to always be prepared. Embrace your financial life now before an unexpected event occurs.

The first step toward becoming prepared for the unknown is to seek good advice. Women typically look to friends and family first, and while this may be helpful, it's also important to hire a financial professional who can guide your decisions based on your unique purpose

in life. Take the time to vet your candidates and truly find your match; after all, this is an important relationship that should flourish over time with open communication and trust.

Here are three ways female Baby Boomers can become more savvy with their money:

### 1. Define Your Purpose

Most women are driven by a purpose that goes beyond their immediate needs and concerns. It's about who we are and what we want to accomplish in life that motivates and inspires us on a daily basis. Developing this foundation of knowledge with your financial advisor will drive your decision-making and bolster financial confidence.

### 2. Design Your Future

Based on a more purposeful understanding of who you are, your financial advisor can better evaluate and assess your available assets and future resources. The goal is to design a unique plan for you by identifying options and opportunities that both complement and

intertwine your purpose and financial goals.

### 3. Embrace the Process and Stick with It

Fitting in one-on-one time with your financial advisor regularly is essential. Meaningful conversations proactively address important financial issues you're facing.

By embracing this process, you will stay engaged and aware of your financial situation, make thoughtful decisions for your future and feel more confident that no stone has been left unturned.

Taking the first step toward becoming proactive in your financial life will lead to great things: financial organization, a simplified life, less stress and anxiety and more confidence in your financial decision-making. Not to mention a wonderful sense of continuity, clarity and direction, I promise!

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