

Check out this inaugural issue of The Savvy SNAPSHOT— for women only!

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**McKinley
Carter** MASTER YOUR
WEALTH.



JULY 2023 | VOL 1, NO 1

Earlier this year we launched The Savvy — our women-focused educational initiative to instill financial confidence among ladies of all ages as they pursue their ideal life.

It was no surprise to us that, when surveyed, our female clients were very supportive of this idea and excited to learn more about topics most interesting to them. In response, one of our actions has been to create *Snapshot* — a semi-annual newsletter that will highlight financial information for women and so much more!



Our survey results also told us women were interested in more one-on-one conversation and in-person events. Throughout the McKinley Carter footprint, we have begun hosting events geared specifically to women that are not only fun but also encourage dialogue about real financial topics that "hit home" with women.

Coming up will be the opportunity to join in on a Savvy Chat – an intimate, one-hour event where women will gather in each region to discuss this issue's Savvy Chat Video ["How to Be the Author of Your Financial Story"](#) highlighted

below.

We hope you enjoy this inaugural issue of *Snapshot* and find a way to join our Savvy sisterhood! Share this newsletter, bring a friend to a Savvy Chat, or send over an idea you'd like us to explore — we can't wait to see how the Savvy can help you pursue your ideal life!

Julie

[Julie A. Brown, CFP®](#)

Financial Strategist & Founder of The SAVVY

EVENTS RECAP: Spring 2023 Launch Events

THANK YOU to all our guests who attended one of the Savvy launch events held last spring in the Pittsburgh and Dayton regions!

PITTSBURGH — Sip & Stencil Workshop



The Pittsburgh team hosted a Sip & Stencil Workshop at Board & Brush to not only introduce the Savvy concept, but also to provide some creative fun.

After learning about Savvy initiatives from Financial Strategist [Nicole Gabriel](#), all the ladies made a custom doormat to take home!

DAYTON — 'Supper with the Savvy' Dinner



In honor of International Women's Day, the Dayton team hosted a "Supper with the Savvy" event, welcoming a group of ladies at Harrison's restaurant (Tipp City).

The guests enjoyed cocktails and dinner while learning what's to come with our Savvy program



from Financial Strategist [Julie Brown](#).

*Watch for more information coming this fall
about Savvy events near you!*

How Women Can Benefit from Secure 2.0

It is no secret that the financial odds are stacked against women. Whether caused by life circumstances outside of their control, unfair perceptions, or chosen priorities, women, on average, have more financial stress to overcome than men. Stress of any kind can take its toll on your health and well-being.



SECURE Act 2.0 continues a push in legislation to address some of the financial stress points that women face.

Learn from Financial Strategist [Joel Estes](#) which new potential *stress-reducer* might benefit you?

[Read more](#)

Savvy Video Chat Series / Episode 1 'How to Be the Author of Your Financial Story'

We invite you to watch Episode 1 of our new SAVVY Video Chat Series, "[How to Be the Author of Your Financial Story](#)" with Financial Strategist [Julie Brown](#) and author of new e-book *Missing Chapters in Your Financial Story* [Brian Gongaware, CFP®](#). Brian is also Director of Advisory Services at McKinley Carter.

In this video chat, Julie interviews Brian about his ebook and the key



actions one should take to experience a successful financial journey.

With helpful tools, worksheets, and examples, the ebook is an easy-to-understand resource that will help you to build your financial confidence. To download the free ebook, [CLICK HERE](#).

WOMEN & PHILANTHROPY: How to Leave a Lasting Legacy on a Modest Budget

There are many of us who want to give back to our communities, but can't seem to find the right balance between family commitments, bills, and other priorities. How can I make a difference on a limited budget?



Nonprofit Advisory Director [Kathleen McDermott](#) shares her real-life suggestions for both short-term and long-term giving.

[Read more](#)



Meet Chief Administrative Officer Lori Payne

At McKinley Carter, we are proud of the 27 women (almost 50% of our staff), who are pivotal to our success and the success of our



Marta Woodman Earns AAMS® Designation

Congratulations to Client Coordinator [Marta Woodman](#) for her hard work in earning the Accredited Asset Manager Specialist (AAMS®)

clients. We'd like you to meet our [Chief Administrative Officer Lori Payne](#), who has been with the firm for more than a decade. In her CAO role, she is responsible for all aspects of business operations, including organizational development, oversight of all business management projects, and facilitation of process improvement activities.

Lori is full of energy and is always supportive of her colleagues. She carries that enthusiasm forward into her additional leadership roles at our sister companies McKinley Architecture + Engineering, Omni Strategic Technologies, and Willow Glen Capital.



McKinley Carter Resources

If you're looking for information on a variety of topics, we encourage you to visit our [INSIGHTS](#) blog library and our [RESOURCES](#) website page where you can find newsletters, videos, webinar recordings, and much more!

We pride ourselves on providing comprehensive and easily digestible materials. But if you're seeking something specific and can't seem

designation.

Marta recently completed the AAMS® course and passed the certification exam, demonstrating her broad knowledge of asset management.

Marta is a member of our Dayton office team and is one of the amazing female professionals at McKinley Carter!



to find, please reach out to use using our [Contact Form](#). Someone from our team will be back in touch with you within 24 hours.

What's Coming in the December 2023 Edition of Snapshot

- **Savvy Chat: *Life Changes and Money Changes – Now What?***
- **Investing 101 – The Basics of Investing and the Markets**
- **What You Need to Know About Building Your Retirement Nest Egg**
- **And more!**

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