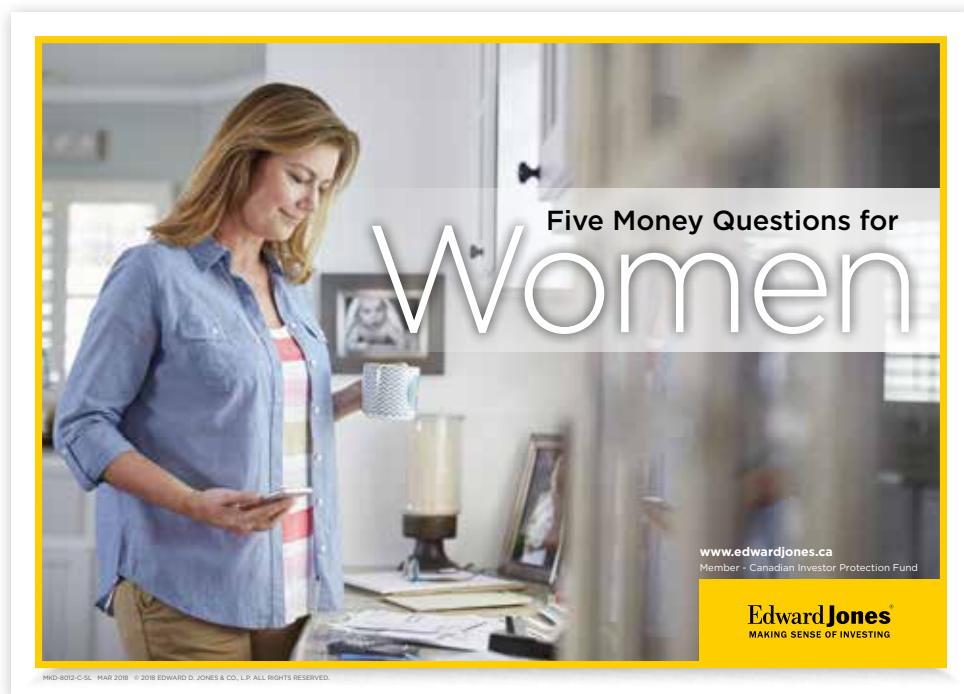


# Five Money Questions for Women

Edward Jones®



## Fact Fiction?

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### Fact Fiction?

Nearly 60% of working individuals have calculated how much they'll need for retirement.



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## Fact **or** Fiction?

Women are about three times as likely as men to report they have quit a job to care for a family member.



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## Fact **or** Fiction?



Nearly 60% of women will be solely responsible for their finances at some point in their lives.

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**FICTION**

Nearly 60% of working individuals have calculated how much they'll need for retirement.



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**FACT**

Women are about three times as likely as men to report they have quit a job to care for a family member.



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**FICTION**



Nearly 60% of women  
will be solely responsible  
for their finances at some  
point in their lives.

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**DON'T  
WAIT**

until you're forced  
to take responsibility  
for your financial future.

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# Five Money Questions for Women

## Five Questions

You Can Ask to Connect to Your Financial Goals



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Where Would I Like to Be? **2**

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Values **VS** Goals

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Imagine  
Your Goals

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## Common Primary Financial Needs

- Preparing for Retirement
- Living in Retirement
- Paying for Education
- Planning for the Unexpected
- Planning Your Estate or Inheritance

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## Meet Denise

- Oldest of three
- HR professional
- Divorced; remarried



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## Denise's Goals

An Emergency Fund

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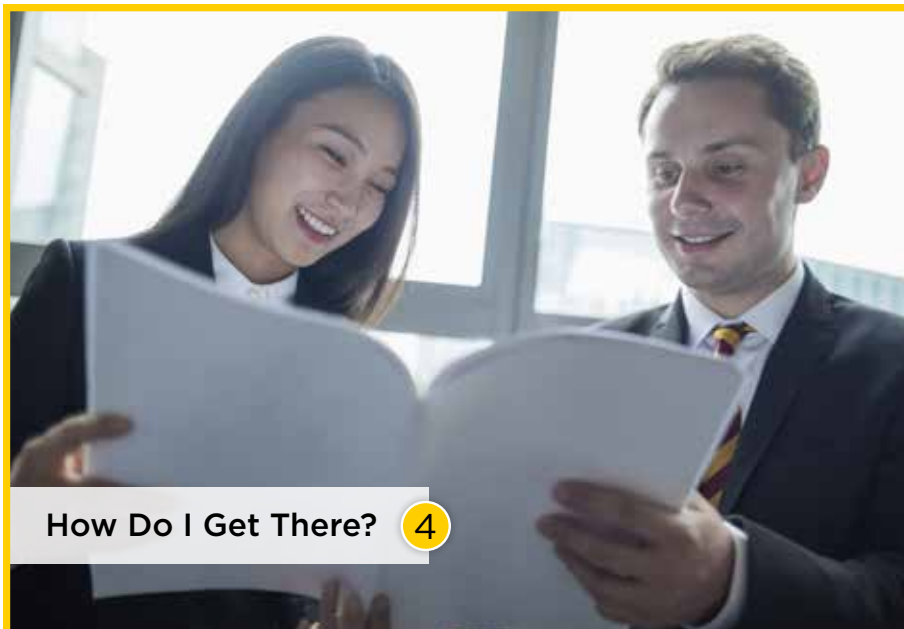
### 3 Can I Get There?

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## S.M.A.R.T Goals

- S**pecific
- M**easurable
- A**chievable
- R**elevant
- T**ime-framed

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## How Do I Get There? 4

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### Your Overall Strategy

- Plan for the Expected
- Prepare for the Unexpected
- Position Your Portfolio for Both

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## The Rule of 72

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Denise's Goals:  
University for  
Bree

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## The Rule of 72

12

$\frac{1}{2}$

%

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## A Disciplined Approach

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## Four “C’s” of Systematic Investing

- Convenience
- Consistency
- Choice
- Control

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## Employer-sponsored Retirement Plans

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## RRSP and TFSA

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## Denise's Goals: Preparing for Retirement

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**The biggest mistake** people make when it comes to investing is **not getting started.**

**DON'T  
WAIT**

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**How Can I Stay on Track? 5**



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WAIT**

until you're forced to take responsibility for your financial future.

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## Our Value Proposition



- Understand what's important to our client
- Use an established process to create personalized strategies
- Partner throughout life to help keep them on track

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# Five Money Questions for Women

## A Team Approach for our Clients



Edward Jones, its employees and financial advisors are not estate planners and cannot provide tax or legal advice. Clients/prospective clients should consult their estate-planning lawyer or qualified tax advisor regarding their situation.

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Get Started Today

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## Questions & Answers

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Please Complete  
Your Evaluation Now

# Thank You

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**Edward Jones**  
MAKING SENSE OF INVESTING

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