

## INTRODUCTION: JUDY PARADI AND PAULETTE FILION

With close to \$3 trillion dollars of investable assets on the line to fund the future requirements of baby boomers, Generation X and Y and Millennials, and with governments and organizations downloading the responsibility of retirement wellbeing onto the individual, the need for sound and reasonable advice has never been greater.

Financial advisors are more important than ever to ensuring the success of individuals to take care of themselves in retirement.

However, the investor landscape is changing. As male boomers begin to die, and women in general are more educated and have better paying jobs, more and more investors are women.

Understanding women and responding to their needs is not as simple as a name change on the account, and it certainly isn't just about "pink marketing".

Women and the value of their investible assets have become one of the hottest topics in the United States.

Judy Paradi and Paulette Filion have been studying women investors for more than 20 years each. They are frequently sought out by the media, have published several white papers and blog on a regular basis.

Judy and Paulette believe that success over the next 20 years is dependent on the ability of advisors to meet the needs of women investors.

- That's true whether it takes place in providing advice to a couple,
- or in serving the needs of women who have lost their husbands and inherited the family wealth well before the kids get it
- or in helping the growing number of successful women invest for their own future.

Effective response to women and their need for advice combines a developed listening-ear, an ability to translate industry jargon into plain language, a respect that shows understanding, and an ability to build confidence. Judy and Paulette provide insights, tools and motivation in all areas of "women and investing."

They talk about the huge opportunity women represent and share the secrets to succeeding with them through a clear step by step process, illustrating their lessons with their own personal stories.

*Please welcome Judy Paradi and Paulette Filion.*