WidowWise

FINANCIAL CARE

Continuing Education for Financial Advisors

Financial Planning for Newly Widowed Clients

A Better Approach During a Painful Time

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WINGS FOR WIDOWS
Guiding Widows to Financial Wellness.™

Most financial advisors work with clients who have lost a spouse at some point. While sympathetic to this transition, it's still pretty much "business as usual." Naturally, advisors want to help, but what is it clients need during this stressful and painful time? They can't tell their advisor because even they don't know. But advisors need to know

This session will provide an overview of the widowed crisis and the financial impact of losing a spouse. Advisors will learn the five critical areas that need priority attention. Advisors will be provided new optics with which to provide financial planning to widowed persons that will result in deeper relationships, retention, and referrals.

Topics Covered (55 minutes):

- Overview of the Widow Crisis
- The Financial Impact of Loss
- Challenges Unique to the Widowed Client
- TOP 5 Financial Topics Most Important to Widowed Persons
- A New Framework for Financial Planning
- Winning Clients for Life

BOOK NOW FOR 2023-24:

- **612-799-9892 or info@wingsforwidows.org**
- **No speaker fee (virtual); $1,000/Hr + Travel Expenses**
- **1.0 CFP CE; NASBA Category: Specialized Knowledge and Applications; Course Level: Basic; No Exam**

Wings for Widows' mission is to provide professional financial planning and education to help newly widowed men and women navigate the financial trauma that defines early widowhood. We provide advice, financial planning, and education at no cost and the newly-widowed gain financial clarity, confidence, and peace of mind when they need it most.