



## Engaging Women Investors

# Creating connections that last

By 2048, \$54 trillion in personal wealth is expected to transfer to women<sup>1</sup>—reshaping the financial industry. Women investors aren't just looking for someone to manage their money—they want an advisor who truly understands their goals, challenges, and values. Set yourself and your practice apart by engaging women in meaningful conversations as you guide them through every step of their financial journey. Are you ready?

### Program Overview

- Uncover actionable insights to understand the core financial motivations of women clients.
- Recognize and navigate your clients' decision-making styles—Primary, Shared, or Delegating—to drive more meaningful engagement.
- Deepen relationships by applying emotional intelligence strategies that build trust and rapport.
- Equip women and their families with educational and mentorship resources to foster lasting financial confidence.

95%

of personal wealth will transfer to women<sup>1</sup>

81%

of widows will remain with their financial professional if they have strong rapport<sup>2</sup>

Over 50%

of assets controlled by women are currently unmanaged<sup>3</sup>

<sup>1</sup> Cerulli, "The Cerulli Report—U.S. High-Net-Worth and Ultra-High-Net-Worth Markets 2024," January 2025.

<sup>2</sup> Cerulli Report, "Trust in Transition: Widows and Widowers," September 2024.

<sup>3</sup> McKinsey, "The new face of wealth: The rise of the female investor," May 2025.

## Resources for Financial Professionals:

### CE presentation



**Strategies for Success** – Discover key trends shaping women's wealth, tailor your advice to her decision-making style, and strengthen trust with targeted engagement strategies.

### CE presentation



**Help women unlock the Power of Social Security** – Discover how Social Security impacts women and their spouses, get essential claiming strategies, and learn the critical impact of timing and coordinating benefits for spouses.

### CE presentation



**The Intersection of EQ and IQ** – Elevate your client relationships by enhancing emotional intelligence, deepen trust with purposeful listening, and tailor strategies to women's financial decision-making roles.

### Companion workbook



**The Intersection of EQ and IQ workbook** – Translate workshop takeaways into action, use targeted ideas to connect with women investors, and drive your business growth.

## Resources for Investors:

### Client/prospect seminar



**Finding and Funding Your “Why”** – Discover what motivates your financial decisions, embrace your unique role, and partner intentionally with your financial professional to achieve your “why.”

### Companion worksheet



**Finding and Funding Your “Why” worksheet** – Uncover your financial motivations, clarify your decision-making style, and use these insights to take purposeful action toward your goals.

### Client/prospect seminar



**The Power of Social Security for women: Unlock the full potential** – Empower women clients (and their spouses) to dive into claiming strategies, including the impact of timing, working in retirement, and the overall impact to your retirement income.

### Handout



**Checklists** – Empower yourself to navigate life's transitions—whether as a caregiver, after divorce, or following the death of a spouse—by utilizing these interactive checklists to organize your finances and make confident decisions.

Handout Workbook/Worksheet Presentation/Workshop

Take your practice to the next level. **Contact us.**

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