

Holy Family Church & The Office of Parish Stewardship

invite parishioners, parents and friends for presentation on

Preparing For Your Family's Financial Future . . . *Beyond The Money*



FAMILY FINANCIAL FITNESS:

*What shape is
your family in?*

What are the risks of not being prepared?

Is it all just about the money?

*How to get the most
from professional advisors?*

*How to get started –
what every family should do today!*

TOPICS INCLUDE:

Healthcare, College, Retirement, Estate Planning

Moderated by Allyson Simpson
Holy Family Church Parishioner and
Senior Director of Gift Planning at Caltech

LOCATION: The Athenaeum
551 South Hill Avenue, Pasadena
Complimentary cocktails & hors d'oeuvres

DATE: Tuesday, May 19 from 6:00 – 8:00 pm

Please RSVP to Mary Hatton in the Office of Parish Stewardship:
626.403.6138 or mhatton@holyfamily.org

This event and parking are complimentary (Use lot adjacent to
The Athenaeum entrance on Hill Ave., just north of California Blvd.)

GUEST SPEAKERS:

Diane Doolin is a Financial Advisor and Senior Investment Management Consultant at Morgan Stanley in Pasadena. Named in Barron's "Top 100 Woman Financial Advisors", she advises families and individuals on wealth management and financial planning. A co-founder and faculty leader of the Institute for Preparing Heirs, Diane is recognized as a wealth advisor innovator who brings a much-needed new perspective on family wealth and family financial readiness. She frequently speaks on these topics at workshops, conferences, and other events.

Vanessa Terzian is a principal attorney at Terzian Law Partners, APC, and has been named a Top Attorney in Pasadena Magazine and a Rising Star by Super Lawyers. Vanessa specializes in estates, family wealth and business and financial planning and all matters associated with probate and elder law. Vanessa's primary offices are in La Canada. She, too, is a frequent speaker at workshops and programs on these subjects and is also an adjunct professor of Wills & Trusts at Southwestern Law School.

Family Financial Readiness Toolkit Provided to Attendees