100 women in hedge funds

Next Gen Coach - The ABCs of managing your money

October 26, 2016 at 6:30 PM
London

Discover the essential steps to control your personal finances. Learn the best tools to make well-informed decisions. Securely plan your future budget, savings, and investments.

This interactive workshop will explore:

- The importance of setting financial goals, plus having a plan and financial roadmap
- The key principles in building personal wealth
- The use of different financial products, e.g. ISAs and SIPPs, to help achieve your goals and independence

Bring questions for an informative discussion with our financial planning expert, Philippa Whatley.

Women are increasingly the creators and owners of wealth - in the US, it is estimated that women exercise decision-making influence of over $11.2tn of investible assets equating to 39% of total investable assets in the US and it is estimated that by 2030, women will control two-thirds of the nation's wealth! Yet when it comes to looking after our own wealth, we are far behind.

While 82% of women are confident in managing their day-to-day budgeting we tend to be less confident regarding planning for our financial needs during retirement or selecting the right financial investments.

The Scottish Widows Women and Pensions Report in 2013 provided some sobering findings:
81% of women in their 20s do not have a pension scheme and 30% aren't saving for a pension because they don't understand them.
21% of women in their 30s expect to rely on their partner's income in retirement.
23% of women in their 40s prioritise supporting their children over retirement saving

So why are we putting ourselves at a disadvantage when it comes to our personal finances? Join our workshop to start the road to controlling your personal finances. Learn how to make better-informed decisions and securely plan your future budget, savings and investments.

During the workshop, light refreshments will be available.

There is a £10 fee to attend this workshop, which is limited to a small group. Please register promptly to reserve your seat.

Event Details

Date: October 26, 2016
Time: 6:15 PM Registration.
We will begin *promptly* at 6:30 PM; please arrive early. Since it is disruptive to everyone when latecomers enter the session, those arriving after an education session has begun will only be admitted at the discretion of 100WHF and the host. Please note the start time on this invite and plan to arrive early.
Host: St. James's Place Wealth Management
Location: 117 Piccadilly, Mayfair, **London**, W1J 7JU, United Kingdom
RSVP: RSVP Now

You MUST pay at the time of your booking to secure your spot. If you must cancel, we will endeavour to fill your spot; however, there is no guarantee that we will be able to do so, and if we cannot find a substitute, the entire amount of the booking will be forfeited.

If you have any questions about this event, please contact the Next Gen London committee.

This event is NOT FOR ATTRIBUTION. All 100WHF events are private events and we require that no one reports publicly on any aspect of them.

If you have no-show fees in arrears, the system cannot register you for an event. You can view and pay for any outstanding no-show fees online from your Member Profile

Space is limited. No walk-ins will be permitted.

Biography

Philippa Whatley, Associate Partner, St. James's Place Wealth Management
Philippa Whatley is an Associate Partner of St. James's Place Wealth Management. She runs her own practice helping clients take the stress and confusion out of financial planning. Whether looking for a financial review, a sense check due to recent changes or an opportunity to take a look at financial position for the first time, Philippa provides a holistic, 360◦ approach that considers:
- Assessing where you are now;
- Where you want to be; and
- Providing a practical and deliverable solution to get you there.

Once a suitable plan is in place, it is monitored and reviewed on a regular basis and adjusted to take into account any personal and financial changes.

Philippa has over 19 years working in financial services from equity trading floors, financial management consulting and helping pension funds transition their assets. She has worked for financial organisations, both large and small such as Citi, Intermonte, Parson Consulting, ING and State Street and from locations as diverse as London, Paris, Milan and Hong Kong.

Philippa draws on this wealth of knowledge and experience in order to provide an optimal financial roadmap for her clients. This is supported by the over-arching strength and depth of expertise of an established and highly regulated FTSE 100 company with the distinct St. James's Place Guarantee.

ST. JAMES'S PLACE
WEALTH MANAGEMENT

About St. James's Place Wealth Management
St. James's Place Wealth Management is a FTSE 100 company with £65.6bn of client funds under management and is one of the UK's leading wealth management organisations. At St. James's Place, we focus on achieving and maintaining a thorough understanding of your financial needs and aspirations. We believe passionately that the best wealth management service is provided through personal, face-to-face advice. Our Partners deliver that service, supported by a comprehensive range of financial solutions and a distinctive approach to investment management, which enables them to create financial plans that can adapt to your changing needs and circumstances.

About 100 Women in Hedge Funds (www.100womeninhedgefunds.org)
100 Women in Hedge Funds is a global, practitioner-driven non-profit organisation serving over 15,000 alternative investment management investors and finance professionals in 20 locations through educational, professional leverage and philanthropic initiatives. Formed in 2001, 100 Women in Hedge Funds has hosted more than 600 industry education events globally, connected more than 400 senior women through Peer Advisory Groups and raised over $38 million gross for philanthropic causes in the areas of women's and family health, education and mentoring.