



RETIRED MEN'S ASSOCIATION OF GREENWICH, Inc. (RMA)

Invites you to its meeting **April 10 at 11:00 a.m.**

First Presbyterian Church, Lafayette Place, Greenwich, CT

Julie Jason

“Managing Retirement Wealth in Good Times and Bad”



In planning for and during retirement, most of us are faced with decisions on how we value, organize and use our financial assets. Is your retirement "portfolio" adequate and well-structured to meet your specific needs? Or do you have a random collection of investments, accounts, and advisers acquired over time? In her presentation, Julie Jason will highlight key personal portfolio management techniques and insights that will help you gain control over your results, along with a better sense of how to deal with the uncertainty that we all face as investors, especially during challenging economic times. A related important issue facing retirees and

the elderly is what to do with all the assets they own (monetary and physical possessions) vis-à-vis their potential heirs or charitable institutions. The use of wills, trusts and other techniques will also be briefly addressed.

Julie Jason, JD, LLM, (www.juliejason.com) developed her views on financial services over a 30+ year career in law and money management, starting out on Wall Street as a lawyer. In 1992, she founded a fiduciary boutique (Jackson, Grant Investment Advisers, Inc. of Stamford, Conn.) for people who wanted more than Wall Street offered. Ms. Jason's team acts as Investment Counsel for families who value a direct relationship with their Personal Portfolio Manager more than a commissioned intermediary (www.jacksongrant.us). In her role as a proponent of financial literacy, Ms. Jason writes for audiences of every financial means. Her award-winning weekly investor protection column has been in publication for 20 years (syndicated by King Features). She is a contributing writer for Forbes.com and is the author of three award-winning books (“Retire Securely: Insights on Money Management from an Award-Winning Financial Columnist” (Sterling 2018); “Managing Retirement Wealth: An Expert Guide to Personal Portfolio Management in Good Times and Bad” (Sterling 2011/2017); and “The Retirement Survival Guide: How to Make Smart Financial Decisions in Good Times and Bad” (Sterling 2009/2017).

Next Week: April 17, Jane Condon, Comedienne, “Jane Condon on Life in Greenwich and Beyond.” *The Greenwich Retired Men's Association offers a free program every Wednesday that is open to the public, both men and women; no reservations are required. Our social break starts at 10:40 AM followed promptly by our speaker at 11:00 AM. Programs are at the First Presbyterian Church, 1 West Putnam in Greenwich. For additional information see www.greenwichrma.org or contact info@greenwichrma.org*