MONEY TALK
Financial Planning Seminars and Publications

Presentation Titles by Dr. Barbara O'Neill, CFP®, AFC®

https://www.moneytalkbmo.com/

Annuities 101: The Basics- Describes key features of annuities as a tax-deferred source of guaranteed lifetime income

Beyond Legal Documents: 12 Financial Planning Strategies For a "Good Ending"- Covers end-of-life planning issues

Do You Need a Financial Advisor or Robo-Advisor?- Discusses criteria to use and questions to ask about advisory services

15 Financial Transitions in Later Life- Discusses topics such as switching from saving to spending, downsizing, and RMDs

Financial Aspects of Unretirement- Discusses implications (e.g., taxes) of returning to the labor force after being away

Flipping a Switch- Provides an overview of 35 financial, social, and lifestyle transitions in later life (based on my book)

Fundamentals of Mutual Funds and Exchange-Traded Funds- Discusses characteristics of these two investment types

Give Yourself A Financial Check-Up: 25 Ways to Measure Financial Health- Describes 25 check-up metrics and tools

How to Inventory and Protect Your Digital Assets- Provides an overview of digital asset types and ways to save key data

How to Protect Yourself in Today's Scary Economic Climate- Discusses specific ways to maintain financial control

Income Tax Issues for Older Adults- Focuses on tax laws and tax planning strategies that apply to older adults

Inflation-Fighting Strategies for Older Adults- Describes specific strategies to cope with a loss of purchasing power

Investment Basics- Describes investment terminology and risks and specific types of investments

Managing Your Digital (and Paper) Financial Life- Includes online bill paying, digital assets, e-filing taxes, and more

Money After 70- Discusses key financial issues and challenges that arise when people reach their 70s

Money Talk: What Women Need to Know About Money- Discusses personal finance topics using a female "lens"

Personal Finance Video Debriefs- A viewing of several videos on financial topics followed by group discussion of each

Preparing Financially for Widowhood and After- Discusses financial and life planning issues for widowed adults

Retirement Risks and How to Avoid Them- Discusses key risks in later life (e.g., longevity and sequence of returns)

Tax-Deferred Retirement Savings Plans in Later Life- Describes laws, decisions, and actions for accumulated assets

Tax Smart Ways to Donate to Charities- Describes tax-advantaged gifting strategies, e.g., bunching, DAFs, and QCDs

The ABCs of CCRCs- Provides a "deep dive" into continuing care retirement communities as a later life housing option

The ABCs of RMDs- Provides a detailed summary of laws and planning strategies related to required minimum distributions

35 Useful Personal Finance Web Sites- Discusses the content and value of a wide variety of financial websites

25 Financial Planning Strategies for Older Adults- Describes each of 25 planning strategies and their potential value

25 Ways to "Spring Clean" Your Finances- Discusses personal finance strategies to perform annually or as needed

What's New in Personal Finance: [YEAR] Edition- Recaps key financial events and trends from each calendar year

What Older Adults Need to Know About Money- Discusses essential "need to knows" about six key financial topics

What's On Your Mind?- A series of brief updates on personal finance topics followed by open Q&A time on each topic

Working Past 65? Financial Planning Considerations- Explores financial benefits and pitfalls of retiring later in life

Year-End Tax-Saving Strategies- Describes over a dozen ways to reduce income taxes before the end of each tax year