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

Financial Planning for Solo Agers- Describes financial planning strategies for people without a spouse or children

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

How to Select and Communicate with a Financial Advisor- Discusses factors to consider when getting financial advice

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

Microsoft Excel as a Financial Planning Tool- Describes 10 Excel templates to use for personal finance calculations

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

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

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)

Serving as a Personal Representative: What You Need to Know- Describes duties required to settle a deceased person's estate

Social Security Basics for Older Adults- Describes SS rules for benefit claiming, full retirement age, taxes on benefits, and more

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 personal finance websites

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

25 Useful Financial Planning Guidelines with Numbers- Presents guidelines for budgeting, credit, investing, and more

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

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