



2023
Top Women
FINANCIAL ADVISORS



2023 trends in **financial planning**



1.

Planning for **inflation**

2.

Assessing **risk**

3.

Preparing for a **Recession**



4.

Investing in **Real Assets**

5.

Transitioning to
**Renewable
Energy
Investments**



BANKERSLIFE®

“Women investors focus more on life goals, take less risks, and are concerned more about the longer-term.”

- Cheryl Heilman,
President, Bankers Life Securities, Inc.
Bankers Life Advisory Services, Inc.



The Top Women Financial Advisors program is a Bankers Life internal incentive awarded to top performing women financial advisors based certain defined criteria.

Need help preparing for **retirement?**

REMINDER

Schedule a 2023 annual review
meeting with my financial advisor.

Yes!

On it!

Paying for College while **Saving for Retirement**

DO

- ✓ Begin saving early to leverage compound interest
- ✓ Consider a 529 plan
- ✓ Maximize your retirement savings first

DON'T

- ⊘ Don't let emotions rule the college search
- ⊘ Don't exceed the combined yearly income of those paying off student loans



Women are 3x
more likely than men
to say they can't afford to
save for retirement.*



BANKERS LIFE®

63% of men have retirement investing as a top priority, where

only 36% of women are currently investing.*



*Forbes, The Impact of Current Events on Women's Finances, <https://www.forbes.com/sites/melissahouston/2022/09/28/the-impact-of-current-events-on-womens-finances/?sh=76676035e2d7>, September 2022.

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43% of women
actively worry about money
at least once a day.*



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