# 5<sup>th</sup> Annual Event Program



# Women's Symposium of Southern California

501c(3) public nonprofit TAX ID 81-3501443

In Honor of International Women's Day

Improving the quality of life, financial independence, and confidence of women.

# FOCUSED. FLEXIBLE. PURPOSEFUL.

Friday, March 5th 2021

9:00 a.m. to 1:00 p.m. PST

Web-based program https://hopin.com

Follow us on Social Media & Website

https://www.wssocal.org

https://www.facebook.com/womensocal

http://www.instagram.com/wssocal

https://www.linkedin.com/in/women-s-symposium-of-southern-california https://twitter.com/wssocal















# NOTICE OF FILMING AND PHOTOGRAPHY

When you enter a Women's Symposium of Southern California ("WSSC") event or program, you enter an area where photography, audio, and video recording may occur.

By entering the event premises, you consent to interview(s), photography, audio recording, video recording and its/their release, publication, exhibition, or reproduction to be used for news, web casts, promotional purposes, telecasts, advertising, inclusion on websites, social media, or any other purpose by WSSC and its affiliates and representatives. Images, photos and/or videos may be used to promote similar WSSC events in the future, highlight the event and exhibit the capabilities of WSSC. You release WSSC, its officers and employees, and each and all persons involved from any liability connected with the taking, recording, digitizing, or publication and use of interviews, photographs, computer images, video and/or or sound recordings.

By entering the event premises, you waive all rights you may have to any claims for payment or royalties in connection with any use, exhibition, streaming, web casting, televising, or other publication of these materials, regardless of the purpose or sponsoring of such use, exhibiting, broadcasting, web casting, or other publication irrespective of whether a fee for admission or sponsorship is charged. You also waive any right to inspect or approve any photo, video, or audio recording taken by WSSC or the person or entity designated to do so by WSSC.

You have been fully informed of your consent, waiver of liability, and release before entering the event.

The Women's Symposium of Southern California (WSSC) Improving the quality of life, financial independence, and confidence of women in Southern California. Federal Tax I.D. #81-3501443 501(c)3 non-profit corporation. 1198 Pacific Coast Highway Suite D-104, Seal Beach CA 90740.

# **2021** Note from the Founder

# We survived and we are stronger for it! We are Focused. We are Flexible. We are Purposeful.

No one needs to remind us that 2020 was a year of challenges and unforeseen road blocks. Most important, it was a year we lost loved ones.

As we move forward with positive thoughts and hope, let's focus on what we learned. All the enhancements to life that came from covid-style-life: time to sit back, reflect and rethink what one's priorities are. We learned quickly how to adapt. We learned how to reach out to each other- if only on a screen. We are still reminded to get back in touch with long-lost friends. We reacquainted ourselves with business colleagues on another level, perhaps learning what they enjoy doing when not working. We found ways to manage our day and beat the humdrum routine. We discovered hidden talents we never had time to explore. I can go on and on but you get the point. We not only survived, we found a way to thrive and make things better, more meaningful, more Purposeful.

I am excited to celebrate WSSC's fifth-anniversary annual symposium with you today. This is our first time meeting with you virtually, and it is a fantastic opportunity for us to reach so many more women from all over the country to join the conversation about empowering women, uplifting each other and celebrating our perseverance.

There have been many amazing women in the forefront of history in 2020 and 2021 so far, continuing to forge ahead and capture new heights within previously male-dominated spaces. Today, we have an opportunity to meet women in our communities who have achieved greatness in their fields, hear their stories, rejoice in their success, and have an open line to ask them how they do it.

We chose three timely topics for your open-choice Sessions. This year they reflect the opportunities we have to ensure we have first and foremost laid the proper financial foundation. This allows us the freedom to express ourselves through our work and business enterprises. Once we establish financial security, we are ready to open our creative talents to communicate our message to the world. We explore how to sell a product or service, be the best at our chosen career, find a new, more satisfying career, and sustain a business online all in our new virtual world. Lastly, we seek to elevate ourselves, find purpose and meaning, uncover our talents, and discover how to deliver them to the world.

You are amazing! Together we are powerful! Your voice is for all to hear! Revel in your individuality! Share your Aha moments with your inner circle and us! Happy International Women's Day! P.s. My husband is a rockstar supporter of WSSC, and I'm grateful for his unwaivering support. I love you Mr. Aaron Kuck to the Moon & Back!

Warm Wishes & Cheers!

Marah Fineberg-Kuck, CFP®

Marah Lineling - Kuck

Founder & Executive Director Women's Symposium of Southern California pro-bono basis

The Women's Symposium of Southern California (WSSC) is filled with gratitude to these devoted volunteers for their dedication, support and contributions to the Leveling-UP of Women in our community. These women have continued to carry the torch even during our global pandemic, empowering above & beyond as our local heroines. <u>THANK YOU!!!</u>

# **Program Committee Chair:**

♦ Susan Viator - Wealth Planning Consultant & WSSC Advisory Council Member (2016-2021)

Ph: (310) 500-8805 email: susan.viator@capitasfinancial.com

WSSC Volunteer Email: wsscprogram@outlook.com

# **Marketing & Partnership Committee Chair:**

♦ Kirsten Larsen- Corporate Risk Officer, Philanthropist, WSSC Advisory Council Member (2017-2021)

WSSC Volunteer Email: womenssymposiumsocal@gmail.com

# **Event Planning Committee Chairs:**

**♦** Theresa Murphy- Executive Director Precious Life Shelter, WSSC Advisory Council Member (2017-2021)

Email: theresa@preciouslifeshelter.org

- ♦ Marah Fineberg-Kuck- WSSC Advisory Council President (2016-2021) Email: <u>womenssymposium@outlook.com</u>
- ♦ Michele Farrell- Financial Advisor, Advisory Council Member (2020-2021) Email: michele@tfawm.com

# **Communications Chair:**

♦ Michelle Ponce- Philanthropist and WSSC Advisory Council Member (2020-2021) Email: <a href="michelleraeponce@gmail.com">michelleraeponce@gmail.com</a>

# Social Media:

◆ Janet M. Elie, Founder Launch4Life & WSSC Volunteer (2017-2021) Ph: 480-788-6366 Email: Janet@launch4life.com

# **WSSC Virtual Administrator:**

Cheryl O'Neil- Owner WomenDo! WSSC (2020-2021) Ph: 949-316-8089 Email: <a href="mailto:cheryl@womendostuff.com">cheryl@womendostuff.com</a>

# A Special Thank You for Helping:

WSSC CPA: Melinda Taylor, pro-bono basis, <a href="mailto:mtaylor@sofcpa.com">mtaylor@sofcpa.com</a>
WSSC Attorney: Shannon Switzer, pro-bono basis, <a href="mailto:sswitzer@cratonlaw.com">sswitzer@cratonlaw.com</a>



5<sup>th</sup> Annual WSSC Women's Symposium MARCH 5, 2021

9:00 a.m. to 1:00 p.m. PST

# Program Agenda

# In Honor of International Women's Day Theme: Focused. Flexible. Purposeful.

8:30 am Registration & Networking

Reception - Expo Partner Booths - Networking

Check Your Own Internet Connections on Hopin & Power-Up!

9:00 am Welcome by WSSC Executive Director & Founder: Main Stage

Marah Fineberg-Kuck, CFP®

Opening Remarks by Master of Ceremonies: Main Stage

Evelyn Zohlen, CFP® Financial Planning Association

9:10 am Opening Keynote: 'Making Your Own Path'

Jen Auerbach-Rodriguez, Managing Director Strategic Growth Markets, Merrill Lynch, A Bank of America Company

9:40 pm Master of Ceremonies: Overview of Sessions Table Topics: Main Stage

• Financial Literacy: What I Don't Know That I Should

• Hitting the Reset Button In Virtual World

• Finding Your Purpose

10:00 am	Sessions Table Topic Discussions- Attendee Open Choice
10:30 am	10 Minute Break - Expo Partner Booths - Networking
10:40 am	Sessions Table Topic Discussions- Attendee Open Choice
11:10 am	10 Minute Break – Expo Partner Booths – Networking
11:20 am	Sessions Table Topic Discussions- Attendee Open Choice
11:50 am	10 Minute Break - Expo Partner Booths - Networking

12:00 pm Purple Diamond Award Presentation: Main Stage

12:15 pm Closing Keynote: 'Preneur Your Life: Owning Your Impact and Helping Others Do the Same'

Anna Oakes, Founder & CEO Oakes Co. and Co-Founder Own Your Culture

12:45 pm Master of Ceremonies: Program Evaluation, Fundraising & Awareness

12:50 pm Closing Comments & Wrap-Up: Main Stage

# Focused. Flexible. Purposeful. WSSC 2021 SESSIONS TOPICS

30 minutes per table topic. First come - first service for direct video chat communications with session's leaders, all attendees may participate in Sessions Q&A Chat, as well as the Event Chat areas. The Hopin technology allows for a limited amount to share the video chat at a time while sessions are being recorded. There will be 9 session rooms running simultaneously, 3 for each Sessions Topic. You can participate and watch the Leaders and we encourage you to have a voice in the meaningful conversations that are happening through the Session Chat! Share your ideas and take advantage of asking questions from our professional Session Leader volunteers. Woman's Symposium is about empowering you! We hope you have an engaging time with us. Many of our Women's Symposium past attendees look forward to this section of our program for personal advice & connections.

# Financial Literacy - What I Don't Know That I Should Know

What does it mean to be financially literate? Do you know the core elements of a financial plan, where to start, how to adapt as your situation changes? Selecting the right financial advisor for you is the first step. Keeping your plan current is essential to ensure you maintain financial health and adjust as challenges cross your path. Flexibility is critical or your plan fails. Financial wellness empowers and creates freedom to live life under your rules. We want you to thrive versus merely surviving when demands test your plan. 2020 is the perfect example that market volatility, social injustice, and political turmoil can disrupt and even shatter the best plan.

Join our experts for an engaging conversation about how to build your plan, build in contingencies and keep it flourishing and what you should look for in a financial advisor. We'll address the fundamentals and explore various life events, including taking on new debt obligations (such as a home or business venture), entering retirement, raising children or caring for loved ones and more. This session will give you the information and tools for your personal road to financial wellness. Topics will be guided by leaders based on participation, contribution and interest of Women's Symposium attendees through active dialogue.

# **Hitting the Reset Button In Virtual World**

COVID changed the game. How are you adapting? Don't be a casualty of COVID. Focus on the opportunity to reinvent, to recharge, to re-define your work life. Perhaps your business suffered, you lost your job or realized how unhappy you are in your current position. Changing careers, starting or revamping a business or designing a side hustle that feeds your soul are not without risk. But consider the rewards.

Adapting to a virtual world might require transforming your business model or staying relevant by upgrading your skill sets. Develop a clear and focused action plan. Shape your message to let your light shine. Content, format, how, where and when you deliver your message matters more now than ever before.

What better time than now to stretch your mind, your talent and your passion. Reset with intention. Open up your energy and relaunch yourself.

Join savvy entrepreneurs and experts as they share their successes and stumbles along the way. Ask them questions, run ideas by them. You will learn how others are tackling these issues and turning them into opportunities. Session Topic can be guided by Leaders based on participation, contribution and interest of Women's Symposium attendees through active dialogue.

# **Finding Your Purpose**

Purpose is defined as the reason for which something is done or created or for which something exists; have as one's intention or objective; having or showing resolve or determination. Living a Purposeful Life is looking at what you do as a lifestyle not just a job. Purpose is personal. It could be physical, mental, spiritual or all of these. Ask yourself Is it more important to be happy or to matter and make a difference.

Leading a purposeful life involves taking actionable steps, such as: Focus; Living in the now; Saying "no"; and Intention, among other activities.

Find purpose in your work life. Be authentic, be kind and compassionate, and treat others with respect and dignity. Practice these habits to achieve purpose. Maybe you are retired and purpose translates into volunteerism. Giving back to your community, donating your time and energy to non-Profit organizations can be gratifying. Matching your talents, passions and time commitments with the right group is tricky. Listen, learn and share with other determined women seeking a "purposeful life". Professionals from the non-profit world will teach you how to find your match.

The next generation is poised to make a big difference and contribution to all our futures. One of the driving principles of WSSC is advocacy of STEAM education. Leaders in this field will share their stories on breaking into these male-dominated roles. Our goal is to express the importance of entering these important fields of education and aspire pursuit of these specific career opportunities. Session Topic can be guided by Leaders based on participation, contribution and interest of Women's Symposium attendees through active dialogue.

# **March 5, 2021**

# 5th ANNUAL WSSC WOMEN'S SYMPOSIUM SESSIONS BREAKOUT PAIRINGS

Financial Literacy Sessions Breakout GROUP 1					
Panelist Leader	Carly Brooks, JD, CFP®	617-572-0311 Caroline_brooks@jhancock.com			
Panelist Leader	Katherine Zacharias	619-208-7717 katherine@fiveringsfinancial.com			
Moderator	Iram Zia	562-209-2070 alinasmom@live.com			
Financial Literacy Sessions Breakout GROUP 2					
Panelist Leader	Shannah Game, CFP®, MBA	818-917-4624 shannah@mmoneypodcast.com			
Panelist Leader	Rae Russell	619-357-6558 rae@financialcoach4u.net			
Moderator	Claire Thornton	267-229-3811 claire@inspiredfinancial.biz			
Financial Literacy Sessions Breakout GROUP 3					
Panelist Leader	Lisa Chastain	702-305-1905 lisa@lisachastain.com			
Panelist Leader Janet Larsen, CFP®		562-384-7837 janet@stepfinancial.com			
Moderator	Amber Mears	562-594-1438 Amber.mears@wellsfargoadvisors. com			



Pivot in Virtual World Sessions Breakout GROUP 1					
Panelist Leader	Lauren Sweeney	562-203-3215			
		lauren@riseupforyou.com			
Panelist Leader	Jan Walsh	949-558-8611			
		jwalsh@copelandgroupusa.com			
Moderator	Hala Dabboussy	949-415-8089			
		haladabboussy@actioncoach.com			
Pivot in Virtual World Sessions Breakout GROUP 2					
Danalist Loadon	Sarah Eley	949-264-2039			
Panelist Leader		sarah@agileient.com			
Panelist Leader	Janet Elie	816-718-8668			
Pallelist Leadel		janet@launch4life.com			
Moderator	Colleen Brodbine	650-533-6223			
Moderator	Boyarksy	Colleen@gotadvice.com			
Pivot in Virtual World Sessions Breakout GROUP 3					
Panelist Leader	Lauren Beane	336-848-9196			
Pallelist Leadel		hello@laurenbeane.com			
Panelist Leader	Andi Kang	(714) 962-1800			
raniensi Leauer		akang@crownwm.com			
Moderator	Leanne Pheasant	562-243-0335			
Model atol		lparrino@hotmail.com			



Leading Purposeful Life Sessions Breakout GROUP 1					
Danalist Loadon	Kori DeLeon	562-889-1564			
Panelist Leader		RTI Insurance Agency			
D 11 . I 1	Reina Rose	949-742-4454			
Panelist Leader		reina@reina-rose.com			
3.6 1	Somjita Mitra	916-322-2263			
Moderator		Somjita.mitra@dof.ca.gov			
Leading Purposeful Life Sessions Breakout GROUP 2					
Danalist Loadon	Jill Lublin	415-246-8795			
Panelist Leader		jill@jilllublin.com			
Panelist Leader	Ursula Mentjes	855-466-7373			
		ursula@salescoachnow.com			
34 - 3 4	Ashley Grigas	949-350-3725			
Moderator		Ashley.grigas@fiveringsfinancial.com			
Leading Purposeful Life Sessions Breakout Group 3					
Panelist Leader	Caterina Rando	415-350-6854			
ranenst Leader		cat@caterinarando.com			
Moderator	Diana Concoff	925-980-9052			
Moderator	Morgan	diana@wholeheartmarketing.com			



# 2021 WSSC PROGRAM PARTCIPANTS

ALL Program Participants are involved on complimentary or pro-bono basis.

# Marah Fineberg-Kuck - 2021 Host, Executive Director & Founder of WSSC **CERTIFIED FINANCIAL PLANNER™ (CFP®), Volunteer, Activist & Mother of Twins**

email: womenssymposium@outlook.com Instagram: marah\_finebergkuck\_cfp\_wssc https://www.wssocal.org/





Marah's 18 years' experience as a holistic CFP® allows her to accept responsibility as a professional fiduciary and Registered Investment Advisor (RIA) to manage money and offer financial advice. Marah has been a guest speaker at several nonprofit events and educational seminars on various topics. She is also a member of the Financial Planning Association of Orange County, member of Seal Beach Lions Club Int'l, & termed-out VP & Board Member for Seal Beach Chamber of Commerce. Marah is listed as a Los Angeles Magazine's Five Star Wealth Manager Award winner from 2012-2018 &

Orange County 2020 Five Star Wealth Manager Award recipient. Marah's passion is to directly help women's confidence through finances and leadership. She founded Women's Symposium of Southern California a 501c3 public non-profit in 2016 for the advancement of equality and empowerment of women. Marah loves to dance and resides in Orange County with her husband Aaron and 2.5 yrs. old fraternal twins Caleb & Stella. Her dream is to grow Women's Symposium programs year-round and create and support existing public & private mentorship programs for women in STEAM.

# Evelyn Zohlen - 2021 WSSC Master of Ceremonies, President, Inspired Financial and CERTIFIED FINANCIAL PLANNER™ (CFP®),

evelyn@inspiredfinancial.biz



www.inspiredfinancial.biz 714.971.0663



"My own life-changing transition inspired me to start Inspired Financial so that I could help other women and their families navigate their difficult life transitions and emerge confident, financially secure and empowered to deal with future life events."

Evelyn M. Zohlen, founder of Inspired Financial, has served on both the personal and the institutional sides of financial services for nearly 20 years. She received her Bachelor's degree from the University of Texas, her Master of Science from the Joint Military Intelligence College, and her Master of Business Administration (with a

concentration in Finance/Portfolio Management) from Villanova University. Prior to founding Inspired Financial, Evelyn was a Relationship Manager at The Vanguard Group in Malvern, PA where she was the trusted advisor for clients with retirement plan assets ranging from \$175 million to \$500 million.

Evelyn is a Certified Financial Planner™ (CFP®) and in 2020, served as Chair for the Financial Planning Association (the membership association for CFP® professionals with 23,000 members!). She was an adjunct professor in the Personal Financial Planning Program at the University of California at Irvine and serves on the Advisory Board for the Center for Investment and Wealth Management at UCI. In addition, she is a community leader who currently serves on the Board of Governors for the premier business club in Orange County, the Center Club. She has served on the Board of Directors for WomanSage, the Board of Directors for the American Poetry Review, and the President's Council at Immaculata University. Evelyn is a frequent contributor to periodicals such as *The Wall Street Journal*, The Journal of Financial Planning, USA Today, Investment News, Kiplinger's Personal Finance, Real

*Simple* and *Consumer Reports*. Prior to entering the financial services profession, Evelyn served as an intelligence officer in the United States Air Force.

Evelyn is married to the fabulous Mark Prendergast who shares her passion for food, wine, running (it counters the food and wine), reading and travel. Her perfect vacation combines great food/wine before and/or after a race while visiting their three terrific kids and their spouses. Good times!

# <u>Ien Auerbach-Rodriguez – WSSC Opening Keynote Speaker; Managing Director, Head of Strategic</u> <u>Growth Markets Merrill Lynch Wealth Management</u> <u>www.ml.com</u>



Jen Auerbach-Rodriguez is responsible for the client acquisition, retention, and strategic growth initiatives for Merrill Lynch Wealth Management. Prior to this role, Jen founded a strategy team focused on developing engagement efforts with traditionally underserved clients and communities.

Jen's career began as an options trader working with clients to create and execute customized hedging and monetization strategies. Since then, Jen has worked in product origination, platform development and impact investing.

Jen is the recipient of the 2016 Women's Bond Club Rising Star Award, an alumna of Sponsors for Educational Opportunity (SEO), a member of Bank of America's Hispanic-Latino (HOLA) employee network, and sits on the Merrill Lynch Diversity & Inclusion Council. Jen was selected as a winner of the 2016 Global Diversity & Inclusion Award by Bank of America. She was recently recognized by the Paradigm for Parity coalition, as one of 19 trailblazing women for breaking down barriers to help achieve true equality and full representation in corporate offices. And most recently, Jen was recognized by Crain's New York Business as one of 2020's Rising Stars in Banking & Finance.

Jen attended Dartmouth College in Hanover, N.H. earning a B.A. in Philosophy and Columbia Business School in New York, N.Y. earning a Masters in Business Administration.

# Anna Oakes - WSSC Closing Keynote Speaker:

https://www.theoakesco.com/





Anna Oakes is the Founder and CEO of Oakes Co., a trusted Executive and Team Coaching firm based in Milwaukee, WI, and serving clients internationally.

Acting as a trusted advisor for numerous start-ups and sought-after partner for small businesses and Fortune companies alike, Anna works to meet the leader or team where they are and get them where they need to go. She has a proven track record of working within organizations for 19 years as an impactful INTRApreneur, where she played key roles in start-ups and Fortune 500 companies.

Now, with 5 years as an entrepreneur, Anna is the Founder of Oakes Co., a Co-Founder of Own Your Culture, a tech company source and investor, and is currently building out two app ideas to positively affect the world of work. She is guided by her purpose to impact the performance and humanity in our work and workplaces. She is a coach and consultant to many talented humans. Anna is also a <a href="TEDx speaker">TEDx speaker</a>, host of the <a href="Build High Performing Teams Podcast">Build High Performing Teams Podcast</a>, and host of the <a href="Culture and People">Culture and People</a> 'Cast.

# **Financial Literacy Sessions Topic Leaders:**

# Carly Brooks, JD, CFP® - AVP & Counsel, Head of John Hancock Advanced Markets

caroline brooks@jhancock.com www.jhancock.com





Caroline (Carly) Brooks, AVP and Counsel, is the head of the Advanced Markets Group for the US Individual Life operations of John Hancock. In her current position, she manages the Advanced Markets team and helps drive strategic growth initiatives by providing case consultation, technical expertise, and marketing support to field personnel, producers, and financial professionals in the areas of estate planning, tax, and business planning. Carly is an accomplished public speaker, frequently speaking at industry events and conferences, and is an experienced legal writer.

Professional experience: Prior to joining John Hancock, Carly was a member of a top national firm's wealth strategies group. In this role, she provided comprehensive wealth management advice to high-net worth clients in the areas of estate planning, retirement planning, and philanthropy. She also worked for a multifamily firm in Boston providing estate and financial planning advice to ultra-high net worth families.

Education & affiliations: Carly received her Bachelor of Arts degree, magna cum laude, in Criminal Justice and Political Science from the University at Albany, State University of NY and received her Juris Doctor with a concentration in Estate Planning along with her Master of Business Administration (JD/MBA program) from Western New England University School of Law, Springfield, Massachusetts.

# Katherine Zacharias - Mentor, Insurance Ninja, Humanitarian, Living Benefits Expert, Tax Free **Retirement Specialist**,

katherine@fiveringsfinancial.com www.KatherineZacharias.com www.livingbenefitsexperts.com/katherinezacharias

Katherine Sai Wichmann Zacharias is a licensed insurance agent, Living Benefits Expert and Tax-Free Retirement Specialist who Provides life, health, Medicare and travel medical insurance needs. She is a safe money expert who provides unbiased, personalized financial advice and solutions that enable her clients to achieve their financial goals. Helping people create plans that give them the freedom to focus on what matters most is her goal.

Katherine is also the Small Business Life and Health Insurance Guru at Hera Hub San Diego and a Board Member of Hera Angels and the Encinitas Coastal Rotary Club. In her spare time she's helping put an end to human trafficking

#### Iram Zia - Medicare Broker

#### ziainsurance@outlook.com



Iram was born and raised in London, England to immigrant parents from Pakistan. Following her graduation, she began working at select pharmaceutical companies, ending with a contract at GlaxoSmithKline. Her work involved creating databases that held vital information collected during clinical trials for various pharmaceutical drugs soon to be on the market.

After her arranged marriage, Iram and her husband immigrated to California. She chose to stay home to raise her two children, now almost adults. Wanting to return to the workforce, some 15 years later, a friend suggested she study for her life and health

insurance license. With her love of serving the senior community, Iram gravitated towards Medicare sales. After almost 8 years in the field, Iram can honestly say that she has found her calling!

## Shannah Game, CFP®, MBA - CEO- Hello It's Me

shannah@mmoneypodcast.com www.mmoneypodcast.com





Shannah Compton Game is a money wellness expert, CERTIFIED FINANCIAL PLANNER™ professional with an MBA, and on a mission to revolutionize how you think, act, and feel about your money. She is host to the universally popular and highly ranked iTunes podcast, "Millennial Money" with listeners in 164 countries and over 15 million downloads. Millennial Money has helped millions of listeners demystify money topics in a playful and approachable way and features interviews with musicians, authors, chefs and entrepreneurs to help inspire listeners to go out and achieve their dreams. Aside from her podcast, Shannah is the CEO of Hello, It's Me, and

creator of their first product, the Money Mindset Journal. Shannah is also a Lecturer in Finance at California State University Northridge and is an accomplished financial writer and speaker. Her financial expertise has been highlighted in articles for Women's Health, MSN Money, U.S. News & World Report, Reuters, Bankrate.com, Refinery 29 and Yahoo! Finance to name a few.

# Rae Russell Founder & CEO of Financial Coach 4 U & Global Financial Literacy; Director of The **Veteran's Chamber of Commerce**



rae@financialcoach4u.net in www.fc4u1stopshop.com cell: 619-357-6558

http://www.financialcoach4u.net/freeincarerxcard.html CA Lic# 0B73426

I am a single mom raising two FABULOUS children, Andrew and Andreah. I began my financial services career with a company called Primerica in 1996 while enrolled in the United States Navy.

I attained my state insurance license and held a Series 6 and 63 investment license for many years (inactive by choice). I branded myself as "The Financial Coach"

because I wanted to educate people how to play and win at the money game. Over the years, I've successfully educated and mentored thousands of families throughout the state of California.

I am the Founder of Financial Coach 4U and Global Financial Literacy, a 501C3 Non-Profit Organization. I am a volunteer instructor for San Diego Financial Literacy Center providing Financial Literacy for Churches, Military and the general community. I provide that well needed financial education for Active Duty Military prior to their transition out of the military.

I am the Director of the Veteran Chamber of Commerce, San Diego Chapter, where we provide support and resources to Veterans and their families. We are a chamber that focuses on collaborations efforts rather than just a membership.

I have committed my life to teaching financial literacy from Youths to Senior Citizens. I am available for workshops, speaking engagements, mentoring and one on one coaching.

# Claire Thornton, CFP®, - LEAD FINANCIAL PLANNER, INSPIRED FINANCIAL

claire@inspiredfinancial.biz www.inspiredfinancial.biz





"I believe in fostering a relationship with your personal finances. Once you begin to understand what deeply matters to you, the way you put your dollars to use becomes an expression of those values. When you can orient yourself to view your spending as a reflection of who you are, you're able to exercise control over how your money moves; there is great power in that."

Claire Thornton is the latest addition to our planning team and a newly-minted resident of Southern California. Claire is originally from Highlands Ranch, CO and has spent most of her life in the Philadelphia, PA area. She earned her bachelor's degree from Muhlenberg College with a double major in Finance and English Literature.

Throughout her career, Claire has worked in both operational and financial planning roles in the financial services profession, allowing her to bring a holistic perspective to those we serve. As a CERTIFIED FINANCIAL PLANNER™, Claire has discovered a passion for navigating the financial complexities unique to women and families.

Professionally, Claire is an active member in national networks focused on elevating women in their respective fields and fostering interdisciplinary growth and learning. Personally, Claire is an avid runner set on exploring trails up and down the coast as she gets to know her new home state!

# Lisa Chastain - Owner and Founder at Millennial Consulting LLC

lisa@lisachastain.com www.lisachastain.com





Lisa has been coaching, mentoring and advising millennials for nearly 20 years. From an advisor in higher education to Financial Advisor and as a seasoned life coach, she has learned what it takes to make dreams become reality.

Lisa has also had her own personal struggles with learning how to manage her money and live her most authentic life. From being at the top of her game in 2011 to burning through \$100,000 to start her own business and reinvent herself through financial failure and divorce, Lisa uses real life stories and simple strategies and tools to help

women get what they want in life.

## <u>Janet Larsen, CFP® - President and Founder STEP Financial</u>

ianet@stepfinancial.com www.stepfinancial.com





At STEP Financial, Janet is responsible for creating financial plans and investment portfolios for Step Financial. She has over 20 years of experience working with investments. She is an emeritus host of the Investment Planning Knowledge Circle contributing to in-depth discussions of market conditions and investment strategies.

She received the Certified Financial Planner, CFP®, designation in 2008. She did graduate studies in Personal Financial Planning at UCLA passing with honors. Janet became a Certified Financial Transitionist, receiving one of the highest cumulative

scores, in 2016. She earned the Accredited Portfolio Management Advisor, APMA®, designation in 2015.

She is Chairwoman of the Financial Planning Association of California, an advocacy group that meets with California Regulators and Legislators representing financial planners and their clients in California. They promote financial literacy and serve as a trusted resource for legislators on personal financial problems and potential solutions.

Janet is a mentor for women through the CFP® WIN program, which was established to encourage women to become Financial Planners. She volunteers at pro bono financial planning days for the community.

Janet was featured in an article in the Wall Street Journal and has been quoted in TD Ameritrade magazine and other news articles.

Janet is married with three children and loves to spend time with her family and friends. She teaches yoga on Friday mornings. She loves the ocean, scuba diving and boogie boarding. She rates high on Geek tests; she likes to ride Segways, has gone to a Star Trek convention and has watched a lot of Sci-Fi. She will try almost anything, recently Goat Yoga.

# Amber Mears, Financial Advisor - Vice President Investments at Wells Fargo Advisors, WSSC Supporter, and active Mother

Savinlex@gmail.com





As a Financial Advisor with Wells Fargo Advisors, I can offer you a wide range of services, from helping you select individual investments to developing a retirement plan. With access to a broad array of company resources -- including research analysts and economic and market experts -- I can help you make informed investment decisions based on your specific needs. I have 20 years in the financial services and investments industry and am currently accepting new clients. I'm a proud mother of two daughters and 2 dogs. Growing up in Los Alamitos, I have a strong bond with community being a Cal State Long Beach graduate, Member of Los Alamitos PTA, Former softball coach for Los

Alamitos youth softball team. In my spare time I enjoy hikes, kayaking, loving dogs, family time, gardening, and travel.

# **Pivot in a Virtual World Session Leaders:**

# Lauren Sweeny Coach and Trainer, Rise up for You

lauren@riseupforyou.com in www.riseupforyou.com





Speaker Confidence Creator Mindset Trainer Lauren is an activator and a creative thinker with a heart for public service.

Disciplined, coachable, and goal-oriented, she is driven by challenges and has a passion for leadership development and collaboration.

She has advanced coaching certifications from the Direct Sales World Alliance (DSWA) along with a Bachelor of Science in Community and Regional

Development from UC Davis. While there, Lauren also earned the Charles Hess Community Service Award for her efforts in the community. Lauren has served as an Ambassador for the Brea Chamber for several years and enjoys supporting businesses with marketing, and confidence/leadership development. Serving as a trainer of trainers for the California Association of Student Councils for many years, Lauren thrives on mentoring via asking questions, actively listening, and being a positive example of what she teaches.

# Jan Walsh Regional Vice President, Copeland Insurance Group

IWalsh@copelandgroupusa.com



www.copelandgroupusa.com



Jan Walsh is a highly motivated and accomplished Insurance Executive with personal and professional integrity. Her innovative sales and marketing strategies and leadership skills are the foundation of her success.

Ian started her career at Anthem Blue Cross as a Medicare Sales Rep and was quickly promoted to a Regional Sales Manager for Individual, Group and Medicare sales. In 2012, she was recruited by Word & Brown as National Sales Director developing their Individual & Medicare division. When that division was sold, she

became an Account Executive with Emerson Reid serving as a General Agent for Group Insurance. Jan joined Easy Choice in 2017 assisting their growth which led to the integration with WellCare and further integration to Centene. Jan was promoted to Senior Manager – Broker Products. In August of 2020, Jan was recruited by Copeland Insurance Group where she is now the Regional Vice President and handles the West Region.

Originally from St. Louis, MO, Jan graduated with a BSBA from the University of Missouri – St. Louis and received her MBA in Marketing & Management from Lindenwood University. Jan lives in Laguna Niguel, CA and is the proud mom of 2 grown sons, both with BSBA degrees in Finance and both living in NC. Jan received the Professional Accreditation of Healthcare Management (PAHM) designation in 2020 and embraces all opportunities to learn more about the industry, leadership, and the evolving health care system. Jan has served on the Board of WISE (Women Investing in Security & Education) since 2012 and is on the Executive Leadership Committee. She has a passion for sharing the importance of women being financially independent and "wise" with their financial decisions. She is involved with Girls Inc. serving on their Audit Committee as well as mentoring young ladies.

In her free time, Jan enjoys long walks at the harbor, reading non-fiction, and listening to worship music.

# **Hala Dabboussy Business Accelerator | Action Coach**



haladabboussy@actioncoach.com https://haladabboussy.actioncoach.com/



One of Hala's biggest strengths is her "get it done" attitude. She is not only a thought leader but combines that with actions that lead to results - a rare combination.

Hala has worked in the corporate world since the year 2000. She has many years of experience under her belt. She has taken on many roles ranging from Administration, Sales, Marketing, Business development, partner Management, Training, and Education and is currently pursuing her certification in HR

management. Her background and experience make her uniquely positioned to work with business owners to grow and systematize all aspects of their business.

Hala has always been an advocate for learning. As an **ActionCOACH**, Hala belongs to a network of over 1,000 business coaches in 80 countries. With this network of brainpower, along with her degree in languages and translation as well as her certification in HR management, Hala will apply her knowledge to show you how to accelerate your results.

# Sarah Eley Co-Founder and COO Agileient

@kurbngoapp sarah@agileient.com in www.agileient.com



Sarah Eley is the co founder of Agileient. Agileient is software solutions company that specializes in Mobile Apps, Web applications and web presence. They work with small businesses to bring efficiencies through technology. Agileient has successfully helped several businesses become effective and competitive using customized and affordable websites and mobile apps to streamline their business processes. Agileient has launched a FREE online ordering app called **kurb n go** that has been featured on KTLA and ABC 7. Helping the community during this unprecedented time is importing to Agileient. More and more restaurants are

being added to **kurb n go** every day.

Sarah resides in Orange County with her husband, 2 boys and her dog. When she is not working, she loves to play tennis, read and during these slow Quarantine times spend more time with her family.

KTLA link: https://ktla.com/news/local-news/o-c-company-launches-kurb-n-go-pickup-and-deliveryapp-to-help-local-restaurants/

# **Janet Elie Marketing Coach & Consultant**





Janet spent 30 + years in corporate America successfully collaborating with financial advisors and insurance agents to help consumers take care of their investment and protection needs. The focus included marketing and management.

After walking the "hot coals" in a Tony Robbins event, Janet knew she needed a paradigm shift. With her own ideas in mind, she wanted to be in charge of her own message.

She partnered with her sister, Gillian Whitney to assist small business owners and entrepreneurs to help them develop online marketing processes that work in today's digital and virtual world. Their business, Launch4Life has been in practice for over 5 years, and they provide coaching and consultation on all matters relating to online marketing and the critical components of their business planning. Janet and Gillian teach in baby steps to make marketing "easy peasy."

Their services include coaching on video marketing tools and strategies and online marketing processes. They are also the founders of LetsConnect.me, a virtual busines hub that showcases a business owners' resources.

Mission statement: Helping create clarity and an action plan for your business. We meet you where you are NOW and take you where you need to GO.

To learn more about Janet and her partners services, please visit www.janetelie.com

# **Colleen Brodbine Boyarsky**

colleen@gotadvice.com





Colleen has worked in and with startups in the Silicon Valley for the past two decades ensuring operational excellence in the areas of accounting, finance, sales and IT. Working closely with key management Colleen has created and implemented phased approaches to bringing process and system efficiencies in rapid growth, evolving organizations. Additionally, she has been involved during the due diligence phases of mergers and acquisitions providing key analytics and forecasts that strengthened acquisition costs and subsequent performance post M&A.

With an MBA in Finance from Rutgers Graduate School of Business Management, Colleen has worked in a variety of roles in diverse industries from aviation to education with a focus during the last 20 years on high tech and life sciences. Each experience has provided Colleen with a wealth of knowledge and skills easily transferred that into new organizations and industries. Her focus with startups has been on the upgrade of automated systems critical to the operations of those businesses. By developing a phased approach to the overarching infrastructure plan of an organization, Colleen ensures that each piece of the puzzle is firmly in place and tightly connected to each other. The phased approach allows organizations to budget the resources needed, both financial and staffing, ensuring the successful implementation and subsequent execution of these automated solutions and associated processes.

#### Lauren Beane - Small Business Social Lead @ Cisco

hello@laurenbeane.com in www.laurenbeane.com





Lauren Beane is an experienced digital marketer that believes in the power of a good story-- and that all starts with social media. After working years in marketing for a large corporation, Lauren has learned the ins and outs of an effective social media profile. Combining that with her passion for professional development, she is on a mission to empower others to tell their compelling stories through their own profiles.

# Andi Kang CFP®, CAP - BFA President and Founder of Crown Wealth Management, Inc.

akang@crownwm.com



www.crownwm.com



Andi loves being a wealth manager. She specializes in working with business owners, philanthropies and special-needs families make informed decisions about their wealth. She is passionate about being a trusted advisor to her clients who have been blessed with significant financial capacity to help them live abundantly and give generously, our company tagline. It is her heart's desire to walk alongside them while they work to discover the true meaning of wealth while they are sharing the fruits of their abundance with family, their neighbors and the community at large.

# **Leanne Pheasant, Success Leader at Mary Kay Cosmetics**

lparrino@hotmail.com





Undeniably, Leanne is one of the most outgoing people you will ever meet. Her enthusiasm and positive energy are contagious. As the mother of a 3-year-old son and wife to an extremely supportive husband and college professor, life is ever evolving. Leanne attended Cal State Long Beach where she earned a BA and Masters Degree in Communication Studies.

Leanne has a passion for public speaking. She has taught makeup and skin care in front of a variety of audiences including Girl Scouts, seniors, women in recovery homes, and professionals on their lunch break. Not to mention, training hundreds of

consultants on how to build their businesses. Leanne has earned 6 Pink Cadillacs with Mary Kay Cosmetics.

Recently Leanne won her first title as Mrs. Southern California Cities 2019. She has an ability to build rapport with people from all walks of life with the goal of enriching the lives of women, all while balancing her faith first, family second, and career third. Currently, she on the Board of Directors for His Little Feet, a nonprofit that provides shoes to underprivileged children in the Long Beach area. Leanne actively participates in multiple fund-raising events to bring awareness to additional nonprofit organizations, attends civic and community events, and actively inspires and encourages others through her can-do attitude.

# **Leading a Purposeful Life Session Leaders:**

Kori DeLeon - President RTI Insurance Agency kori@rtiins.com https://rtiinsurance.com



Kori celebrated her 30th year with RTI Insurance Agency in October of 2020. She and her husband, Daren, purchased the agency 2012, and are the proud parents of four children who have grown up in the Los Alamitos School system.

Kori was named Business Person of the Year in 2019 and is the current president of the Seal Beach Chamber of Commerce. Kori enjoys playing an active role in the Seal Beach, CA community.

## Reina Rose - Best-Selling Author and Soul Nutritionist

reina@reina-rose.com



www.reina-rose.com



International best-selling author and *Soul Nutrition* ROKU TV & Amazon FireStick show host, The Soul Nutritionist Reina Rose shares her unique experience and expertise on the importance of nourishing the soul. Digging deep into the question of what truly satisfies our inner life, Reina distills ancient wisdom into practical tools useful for today's modern audiences. As a former fitness professional and lifelong student of human behavior, in her latest book "Sin Tastes Good" Reina draws a powerful parallel between harmful food cravings and the common mindsets and behaviors that harm our souls. An expert in lifestyle design Reina's topics direct

audiences on a journey toward personal and spiritual fulfillment.

# Somjita Mitra - Chief of Economic Research California Department of Finance

somjita.mitra@dof.ca.gov





Somjita Mitra, Ph.D. is the Chief of Economic Research at the California Department of Finance. The Economic Research Unit prepares economic forecasts and analyses of various economic developments, advises state departments and local government agencies, provides economic information to the general public and oversees the regulatory review process.

Prior to joining the Department of Finance in November 2019, she was the Director of the Institute for Applied Economics at the Los Angeles County Economic Development

Corporation. She joined the Institute for Applied Economics as an Economist in June 2013. She was involved in the planning, designing and conducting of research and analysis for consulting clients and local businesses and government. Her focus was on regional analysis, economic impact studies and the industrial and occupational structure of local economies.

Before joining the LAEDC, Dr. Mitra was an Economist for a local economic research and litigation consulting company evaluating economic damages, estimating lost profits, identifying key economic

issues and developing necessary analytical and empirical frameworks. Prior to this, Dr. Mitra was a Project Director for a consumer research firm in Los Angeles where she managed projects that identified and analyzed key market issues for small, local firms as well as multinational corporations. Dr. Mitra received her Bachelor of Arts in Economics and Political Science from the University of California. Los Angeles and her Master of Arts in Politics, Economics and Business as well as her Ph.D. in Economics from Claremont Graduate University. Dr. Mitra enjoys volunteering in the local community and is actively involved in both women's welfare, mentoring first generation college students and animal rescue organizations

#### Jill Lublin - CEO Publicity Crash Course

jill@jilllublin.com jilllublin.com





Jill Lublin is an international speaker on the topics of Radical Influence, Publicity, Networking, Kindness and Referrals. She is the author of 4 Best Selling books including Get Noticed...Get Referrals (McGraw Hill) and co-author of Guerrilla Publicity and Networking Magic. Her latest book, Profit of Kindness went #1 in four categories. Jill is a master strategist on how to position your business for more profitability and more visibility in the marketplace. She is CEO of a strategic consulting firm and has over 25 years experience working with over 100,000 people plus national and international media. Jill teaches a virtual Publicity Crash Course, and consults and

speaks all over the world. She also helps authors to create book deals with major publishers and agents, as well as obtain foreign rights deals. Visit publicitycrashcourse.com/freegift and jilllublin.com

# <u>Ursula Mentjes - Author, Motivational Speaker</u>

ursula@salescoachnow.com





After twenty years of helping thousands of Sales Professionals and Entrepreneurs break through the limiting beliefs that kept them anchored in a not-so-comfortable Comfort Zone, Sales Expert and Coach Ursula Mentjes has distilled her process of creating a new Belief Zone and astounding sales (and life) results into simple steps that anyone can apply to create more money and a truly blessed life.

On a mission to help Entrepreneurs and Sales Professionals quickly and easily make a lot of money so they can give back to the organizations they care about and live a meaningful life, Ursula is sharing the 7-Step Blueprint she has used to create

everything from million-dollar revenue streams and powerful teams, multiple bestselling books and award recognition, sharing the stage with speaking legends, dream vacations, a cross-country move to her sweet home, and even the arrival of her own precious son.

Ursula's unique goal-setting, neuro-linguistic programming, and sales strategies, combined with cuttingedge quantum physics, raw personal accounts of her own learning process, and the simple tools she uses make *The Belief Zone* a must-read for anyone struggling to break through their current financial ceiling and successfully create a life in alignment with their truest desires.

# Ashley Grigas - Manager, Development Business Operations at Gilead Sciences





Ashley Grigas is a financial strategist based in Orange County, California who is passionate about empowering families in their relationship with money through education, support and mentorship. She takes great pride in educating her clients in the art of how money works. She believes that in order to make your money work for you, you must gain financial literacy, confront your money fears and move forward in life with a plan that works for you.

She has had a successful career in Finance, providing over 20 years of valuable service for companies like Gilead Sciences, Cisco Systems, Wells Fargo Bank, Washington Mutual, St. Joseph Hospital, Clinipace Worldwide, Lincoln Financial, John Hancock and many more.

As the Director of Mentorship for the Rotary Club of Mission Viejo and as a volunteer for the American Red Cross, she has been contributing to the improvement in the lives of those across the globe and in our communities. When she is not volunteering or strategizing with her clients, she enjoys spending time with her loving husband and daughters.

## Catarina Rando Best Selling Author - Founder of the Thriving Women In Business

cat@caterinarando.com



www.caterinarando.com



Caterina Rando, is a best-selling author, sought-after-speaker and women's business mentor extraordinaire who passionately serves women leaders on a mission. Her over twenty-five years of educating and empowering audiences and groups, makes her truly masterful at providing a ton of value. She shows women how to be loud and proud about the value you bring in order to serve more people and make businesses thrive. Her books include: *Learn to Think Differently,* from Watkins Publishing, released in over thirteen countries and several languages, *A Women's Guide To Starting a Giving Circle* and her latest book, the *ABCs of Public Speaking* which quickly hit #1 in four Amazon best-seller

categories. Caterina is also the founder of The <u>The Thriving Women in Business</u> Center in San Francisco, a place for women to gather and host workshops. Plus she also started Thriving Women in Business Giving which raises money for women and girls education and entrepreneurship training. Find out more at <a href="http://www.caterinarando.com">http://www.caterinarando.com</a>

# **Diana Concoff Morgan**

### diana@wholeheartmarketing.com



# www.wholeheartmarketing.com



Diana Concoff Morgan, Marketing Strategist, published author, national speaker is a successful serial entrepreneur with over 30 years of experience including building 2 successful businesses using the strategies that she teaches her clients. Diana helps Coaches, Authors, Speakers, Holistic Practitioners and Healers, Direct Sales Consultants and Leaders, Change Makers and Thought Leaders and other Entrepreneurs who rely largely on relationships and referrals to gain new clients. The Whole Heart Marketing Strategy is designed to increase connections and convert them into referrals and clients with tried and tested strategies.

Diana has passionately helped hundreds of entrepreneurs grow their businesses, specializing in training on how to Master the Art of Online Communication, Networking and Client Attraction.

She understands the challenges of building a strategic and authentic online presence that will reflect your whole heart message to bring you the right clients ongoing and has the patience and know-how to help you.

Whole Heart Marketing offers a variety of strategic consulting services, Coaching and Done "With" You Internet Marketing Services, as well as live virtual training and self-paced courses



# **2021 WSSC Purple**Diamond Awards

PURPLE DIAMOND AWARDS: THESE HONOREES SIGNIFICANTLY IMPROVED WOMEN'S LIVES THROUGH ACTIVE INVOLVEMENT, LEADERSHIP, CHARACTER AND ACHIEVEMENTS UPLIFTING GENDER PARITY IN SOUTHERN CALIFORNIA. THE PRIMARY AWARD HONOREES WILL BE HONORED TODAY DURING OUR RECOGNITION EVENT.

#### INDUCTEES OF THE WSSC PURPLE DIAMOND AWARD MET THESE REQUIREMENTS:

- ♦ SIGNIFICANT ACHIEVEMENT IN THE AREA OF EMPOWERING AND EDUCATING WOMEN THROUGH IMPACTING WOMEN'S LIVES
- ♦ ACTIVE INVOLVEMENT IN WOMEN'S ACTIVITIES IN THE COMMUNITY
- ♦ DEMONSTRATED LEADERSHIP INVOLVING POSITIVE CHANGE FOR WOMEN
- ◆ SUPPORTER OF WOMEN'S SYMPOSIUM OF SOUTHERN CALIFORNIA'S (WSSC) MISSION

WSSC MISSION STATEMENT: THE WOMEN'S SYMPOSIUM OF SOUTHERN CALIFORNIA (WSSC) STRENGTHENS THE QUALITY OF LIFE, FINANCIAL INDEPENDENCE, AND CONFIDENCE OF WOMEN IN SOUTHERN CALIFORNIA BY EMPOWERING AND EDUCATING THROUGH A HOSTED ANNUAL EVENT THAT IS ACCESSIBLE AND COMPREHENSIVE IN FINANCIAL PLANNING RESOURCES AND STEAM FIELD AWARENESS.

A Sparkling Congratulations to 2021 Purple Diamond
Award Winners!!!

# **2021 Purple Diamond Award Winners**



Shelly Horvath

Trinka Rowsell



If you would like to our mission you can donate in our Purple Diamond Award Winners Honor <a href="here!">here!</a> As a non-profit 501 (c) 3 organization, your donations are tax-deductible. Please speak with your tax professional about planned giving to the Women's Symposium. You can also visit our booth in the Expo tab to learn about volunteer opportunities.



# **2021 WSSC Purple Diamond Award Winners**





Lee Ann Canaday - Real estate agent Lee Ann Canaday, has been a leader in the real estate industry approximately 35+ years. Her success and Philanthropy have earned her the title, "Woman Of The Year In Business 2012" from the Orange County Business Journal and rightly so because she has the #1 Orange County RE/MAX Team.

Lee Ann also has amassed a total of nearly two billion dollars in Real Estate sold in some of the country's most famous coastal homes. Yet she started as an Algebra teacher. Wanting to buy income producing property so she could travel in the summer with her teacher friends, so

she got her Real Estate license and started that career as well. Working 2 full-time jobs was hard work.

Both her listings and her sales have drawn international recognition for the past three and a half decades and she's frequently featured in magazines like the OCBJ, O.C. Homes, the Los Angeles Times, Dream Homes, Homes & Land, and others. Media also has recognized Lee Ann as an authority for real estate. She also hosts a television show that can be seen every Saturday at 9:00am on Cox Spectrum, Yurview a network getting over 1 million viewers. Her TV show was the first Realtor TV show in the nation and has been airing weekly since the early 1990's.

Lee Ann attributes her success to her love and passion for the area which she refers to as "a paradise." Lee Ann is committed to helping Orange County and their residents and proves it by her strong commitment to local charities. These charities include, United Way, Chapman University, Mission Hospital, Susan Komen, Women Helping Women, American Heart Association... In Fact, she is a member of the Million Dollar Round table at the United Way, first Presenting Sponsor at the now Annual Pink Tie Ball for Komen and title Sponsor for The Amphitheater at Chapman University, Founder at Mission Hospital among other gifts.

Lee Ann earned a Bachelor's and Master's Degree (in Math and History) and of course continues to improve her education with further Professional designations, such as; CFP, CPM, PCAM, GRI, CDPE, IRES, CPRES, and New Home Sales Professional... However, life isn't all about work with Lee Ann. When she isn't previewing properties or assisting clients to find their new home, or working on furthering her education and helping others through charities, she is just like every other person who enjoys family time, working out and playing Tennis!.







**Shelly Horvath** - Say 'YES' to every opportunity that comes your way," is a mantra Shelly always shares with others and has lived herself. A volunteer at heart, she is a community advocate who has taught her children to always stand-up and speak-up for yourself and those who can't. For over 25 years she has been a member of the Junior League of Long Beach, an international charity, leadership and training organization. She is the Marketing Manager for DTS, a high-tech firm in Seal Beach that manufacturers miniature data recorders for crash, blast and injury biomechanics testing.

For over 15 years Shelly has been involved in leadership with PTSA, Girl Scouts, Boy Scouts and for the last decade has been mentor with

the OVHS Business Academy doing mock interviews with students.

When not working or volunteering, Shelly can be found cooking (or eating!) with her husband Peter of nearly 30 years, getting updates from her daughter Annika who lives in Sweden, gardening with her son Ethan or walking their Xolo Mexican Hairless dogs Kikapu and Zumba.





**Trinka Rowsell**. Trinka is married to Lynton and a Mom of three kids (two boys, one girl): 12-year-old Teagan, seven-year-old Liliana, and 4-year-old Weston. She enjoys tea and Peloton in the morning and celebrates special occasions with prosecco and a good charcuterie platter. She is best known for her statement necklaces and dry sense of humor.

Trinka has lived in Long Beach for 25 years and been active with Junior League of Long Beach for 15. She joined Junior League to become more involved in her community where she served in several leadership positions including President in 2012. Trinka continues to spread her knowledge and passion, training future generations of

Board members and Junior League facilitators. She currently serves as Co-Chair of the Junior Leagues of California State Public Affairs Committe (CalSPAC) advocating for women and

children in the areas of Education, Family Support, Health, Human Trafficking prevention, and Violence Prevention. Trinka remains active in Junior League because her true passion lies in training women to be better volunteers, advocates and community leaders.

Trinka also served as Den Leader for her son's Cub Scout Pack for four years and is a 2014 graduate of Leadership Long Beach Institute.

In 2018, she accepted the position of Executive Director for the Long Beach nonprofit Partners of Parks. Trinka shared, "Partners of Parks was a natural fit for me -- all of my formative life experiences growing up occurred in parks. I walked the El Dorado Nature Center trails daily with each of my pregnancies, and have spent hours in Long Beach Parks since having my children." Trinka is passionate about providing scholarship opportunities for underserved youth to attend Parks and Recreation camps and classes for free and honored to help park and neighborhood groups raise money to make improvements and offer programs which positively impact social experiences and quality of life.

"I am humbled and excited to celebrate my fellow Purple Diamond Award honorees and share this award with all of my Junior League of Long Beach and CalSPAC volunteer colleagues who have encouraged and inspired me along my journey. Thank you."



Your input is important to our growth and future planned programs! Help WSSC by filling out our WSSC 2021 Program Attendee Evaluation: <a href="https://forms.gle/RPNfbmvG4XMzV49g8">https://forms.gle/RPNfbmvG4XMzV49g8</a>

We hope that you have a beautiful and personally beneficial experience at the Women's Symposium 2021! Thank you for your support and attendance!

WSSC **Donation link** to Contribute to WSSC Cause NOW and help grow WSSC programs!

# 2022 SAVE THE DATE

6<sup>th</sup> Annual Women's Symposium To celebrate International Women's Day:

Friday, March 4<sup>th</sup> 2022



# Nominate someone for 2022 Purple Diamond Awards



Volunteer for Women's Symposium 2022



Email Us & Get involved at: womenssymposium@outlook.com

Visit us at: <a href="https://www.wssocal.org">https://www.wssocal.org</a>

WSSC <u>Donation link</u> to Contribute to WSSC Cause NOW and help grow WSSC programs!

# **CONTRIBUTE TO THE CAUSE TODAY AT WSSOCAL.ORG!!!**

DONATE NOW at website: http://WSSoCal.org or mail check to:
WSSC & MAIL TO: 1198 Pacific Coast Highway, Suite D-104 Seal Beach, CA 90740
All contributions are tax deductible. WSSC is an IRS approved 501c3 Public Charity | Tax ID 81-3501443



The Women's Symposium of Southern California (WSSC) Improving the quality of life, financial independence, and confidence of women in Southern California. Federal Tax I.D. # 81-3501443 501(c)3 non-profit public corporation.

1198 Pacific Coast Highway Suite D-104, Seal Beach CA 90740. Website: <a href="https://www.wssocal.org">https://www.wssocal.org</a>



# **GENEROUS 2021 WOMEN'S SYMPOSIUM SPONSORS & PARTNERS**















# **ASCENT WEALTH**



























The Financial Architect























socializeLA-com







LAUNCH4LIFE









# **THANK YOU TO OUR GENEROUS 2021 WSSC SPONSORS:**

Aligning their marketing activity with Women's Symposium's related issues enables brands to build a reputation with their target market and build an emotional connection helping to strengthen brand loyalty. Their support is significant to women's social issues today creating an emotive response alongside goodwill.



# **GOLD:**



#### **Schafer-Cullen Capital Management**

Website: <a href="http://www.cullenfunds.com">http://www.cullenfunds.com</a> Catherine Howse, CIMA ® email: <a href="mailto:CHowse@schafer-cullen.com">CHowse@schafer-cullen.com</a>



Diversified Technical Systems, Inc., Seal Beach CA office

Website: <a href="https://www.dtsweb.com">https://www.dtsweb.com</a>
Kirsten Larsen, Corporate Risk Officer
Email: <a href="mailto:kirsten.larsen@dtsweb.com">kirsten.larsen@dtsweb.com</a> office:

562.493.0158 x110



www.fpaoc.org admin@fpaoc.org



https://connectedwomenofinfluence.com/



Marah Fineberg-Kuck CFP® CRPC® 1st V.P.-

Investment Officer Mobile: (858) 361-8556

Email: Marah.Fineberg@WFA.com

https://home.wellsfargoadvisors.com/marah.fin

eberg

See my 5 Star Fortune Link

2021 Outlook and General Market Condition You and a guest are invited to join us for an educational seminar. Our speakers will talk about the outlook and overall review of the market in general and speak about the Secure Act & Cal Choice, retirement plans. Reservations are required.





https://www.luminaryspeakers.com



Affordable, automated 401(k) for small businesses Nikki Rogers

nicole.rogers@humaninterest.com Website: www.humaninterest.com



#### **Precious life Shelter**

Website: www.preciouslifeshelter.org

**Email Contact Info:** 

plsinfo@preciouslifeshelter.org



#### The Port of Long Beach, The Green Port

Website: <a href="https://www.polb.com">https://www.polb.com</a>



#### **Janet Elie**

Website: <a href="www.launch4life.com">www.launch4life.com</a> Email: <a href="mailto:janet@launch4.life.com">janet@launch4.life.com</a>



Website: www. Jhancock.com

Email: CChertboonmuang@jhancock.com



jwalsh@copelandgroupsusa.com https://www.wiseinvestors.org/about



WomenBiz Formula

Mu Zhang, Founder & President

Website: <a href="http://womenbizformula.org">http://womenbizformula.org</a>





SoCal Dreamin T.C. By Swarovski Social Media Links: Facebook -@SoCalDreaminTC

Website:

www.touchstonecrystal.com/SoCalDreamin



NeuBenefits Insurance Solutions Angela Irizarry, Owner CA Lic#: 0I37319 25108 Marguerite Parkway Suite A-10 Mission Viejo, CA 92692-2400

714 235 8761 (Direct) <u>www.neubenefits.com</u>

Email: angela@neubenefits.com



Susan Viator, Wealth Planning Consultant & WSSC Advisory Board Pacific Southwest Financial, A Capitas Financial,

Cell: 310-500-8805

Susan.viator@capitasfinancial.com



Jared Tanimoto, CFP®, 2021 FPAOC President &

WSSC Volunteer; Founder & President

Ascent Wealth Advisors LLC Direct: 949.535.3559 | Irvine, CA

Fax: 949.955.2066 ascentwealthadvisors.com



- WSSC pro bono CPA

Melinda Taylor

Website: <a href="http://www.sofcpa.com">http://www.sofcpa.com</a>

CRATON · SWITZER · TOKAR

WSSC Prop Bono attorney Shannon Switzer Website: https://www.cratonlaw.com/



MFS- Bill Gevov

https://www.mfs.com/role-gate.html



Rich Owens Nationwide
<a href="mailto:owensr4@nationwide.com">owensr4@nationwide.com</a>
<a href="https://www.nationwide.com/personal/investing/annuities/variable/">https://www.nationwide.com/personal/investing/annuities/variable/</a>



David Zappone
Vice President, Regional Director
Fred Alger & Company, LLC
DZappone@alger.com | www.alger.com

# **Bronze and Community Partners**



Tim Crawford

**Zacks Investment Management, Inc.** 

Regional Vice President tcrawford@zacks.com website: www.zacks.com



**Swell Insurance Solutions** 

Email: <a href="mailto:shannon@swellinsure.com">shannon@swellinsure.com</a>



#### **Prudential Financial**

Robert Carvallo

robert.carvalho@prudential.com

https://www.linkedin.com/in/robert-carvalho-2b7b539

 $\underline{https://www.prudential.com/personal/annuitie}$ 

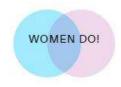
<u>S</u>



MarketSnag- Deb Machen dmachen@marketsnag.com www.marketsnag.com



margaret@socializela.com



www.womendostuff.com cheryl@womendostuff.com





https://connectedwomenofinfluence.com/su e-talks/



https://www.cfp.net/

https://www.letsmakeaplan.org



https://womensjourneyfoundation.org/



https://www.riseupforyou.com/



https://sealbeachchamber.org/



https://pathwaystoindependence.org





https://medicineforhumanity.org/



http://www.stacymungo.com/



Scouting, BSA www.scouting.org

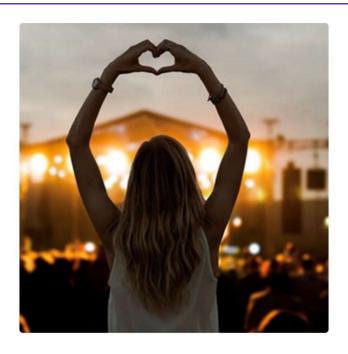


#### www.ssa.gov



https://www.internationalwomensday.com/





THE END! #IWD

https://www.wssocal.org/
Thank you for being our Ally
You can support our work by
donating here!