



DEBRAOHSTROM.COM

# Debra Ohstrom, CFA

Financial Educator | Speaker | Founder

## Your Partner to Build Trust with Women Investors



### TALKS/PRESENTATIONS

#### 1) How to engage with Women Investors

- Where women stand today
- What holds women back from being engaged
- Demystifying women's negative perceptions
- Scripts and Handouts for Advisors to use to make lasting connections and educate clients in an approachable way
- Action Plan and Next Steps for Advisors



#### 2) Women & Investing education events

- Showing women why its so important for them to be involved in the household investing decisions
- Demystifying Negative Beliefs that hold them back
- Explaining long term investing in an easy to understand way
- How Advisors care and can help



### ABOUT ME

#### Years of Experience

Debra Ohstrom, CFA, has spent over 27 years in the Financial industry at firms such as Allianz Global Investors, Merrill Lynch, Morgan Stanley and Citi Private Bank. She has an MBA in Finance and the Chartered Financial Analyst designation.

#### Additional Materials can be Included with Talks

- Handouts and Guides for reference
- [Plan and Invest Workbook](#) on Amazon.com
- Video lessons for use with women clients and prospects

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## Empowering Women to take action for their Financial Future



### WHAT CLIENTS AND STUDENTS ARE SAYING

#### **BIZ** **LIBRARY**

"I'm very excited to add your expertise to our Expert Insights series! This course was so helpful for me personally to learn as we shot, so I can't wait for our learners to gain this valuable information, too!" -

Director of Content

#### **Jacqui C. - Student**

"No one's explained finance and investing to me this way before. Debra makes it so easy to understand."



"Your event was so educational and informative in such an approachable way!"

- Megan Lund, Event Curator



## Your Partner to Build Trust with Women Investors

Financial Companies hire Debra Ohstrom, MBA, CFA to help them drive more business by building strong connections with women and the next generation of investors. Debra has worked with Financial Advisors in different roles for over 25 years and continues to partner with Advisors to navigate this challenge of connecting and educating women to be confident and engaged in their financial future.