



WOMEN INVESTING IN SECURITY AND EDUCATION®

Helping Women and Girls Build
Strong Financial Futures



Empowering women with education and tools to manage their finances

WISE® is a 501(c)3 nonprofit organization based in Orange County with a mission of educating women and girls about personal finance and investing. WISE believes that managing budgets, investments and personal finance will increase options in life and provide a secure financial future for women and their families.

How WISE benefits our members:

- Education - Increases our financial security and ultimately, financial freedom.
- Empowerment - Makes it possible to become financially secure.
- Networking - Provides a network of women who have similar needs and goals.

What WISE has accomplished over the last 20+ years:

- Education to the community - currently benefits over 1000 members
- Financial programs – More than 15,000 women and young girls have participated in our programs
- Invest in Yourself Conferences - Featuring high quality, sought-after speakers
- Philanthropy - Over \$100,000 in donations to various women-related charities

Our Community Partners

We collaborate with like-minded organizations in Orange County to extend the reach of our programs. Valued partnerships include but are not limited to:

- Girl Scouts
- Girls Inc.
- WomanSage
- Center for Investment and Wealth Management at University of California, Irvine, Paul Merage School of Business

Events and Activities

WISE offers financial education to women of all ages, from 5 to 99, through outreach programs. We offer members and the community a series of workshops covering topics including:

- Creating financial independence
- Investment strategies for all markets
- Pathways to become healthy, wealthy and WISE
- Retirement and Estate Planning
- Tax strategies

Signature Salons

Tearing Down the Pink Wall

showcases the professional views and life experiences of accomplished women in the financial services industry.

Twice a year, in collaboration with WomanSage, WISE provides programming and sponsorship for symposiums on financial literacy topics to inspire and encourage women of all ages to better manage their finances and expand their options. When appropriate, we include a discussion with our panelists about their career paths.



Empowerment Workshops

- WISE sponsors workshops targeted at women over 40 through our partnership with WomanSage. These events are held at the Irvine Senior Center at a very modest cost.

UCI/Center for Investment and Wealth Management (CIWM)

- We have a close collaboration with CIWM, members of the Center, and students. Each year WISE awards scholarships to send girls to LifeVest, a financial literacy and life planning program at University of California Irvine.

WISE Choices – Financial Education Specifically for Young Women and Girls

Girl Scouts - Cookie Kick-Off

- In our biggest event of the year, we bring 600 to 800 Girl Scouts through our “money room” to talk about basic financial concepts like setting goals, budgeting, credit and entrepreneurship. Ages 5 and up.

Cookie University

- Cookie University for older scouts explores more in-depth financial topics. We also provide training for Girl Scout leaders on money and investing.



Girls Inc. Workshops

- Through our collaboration with Girls Inc. we sponsor over 10 workshops per year for Orange County-area tweens and teenagers on topics that include saving for college, budgeting and managing credit card debt.

The power of financial education and tools for women

Today many women take an active role in earning money and managing family budgets, but they continue to lag men in investing for long-term financial goals. WISE works to educate women of all ages--preteens in Girl Scouts and Girls Inc. to young women in college, all the way to career financial professionals.

Our mission is to give women the tools and training to make better choices and improve their lives and those of their families.

WISE education addresses the following issues that all women face:

- Women are paid 80% of every dollar a man is paid.
- 90% of women will be solely responsible for their finances at some in their lives.
- About two-thirds of caregivers are women who take time from work, which again, means less income.
- Women have more health-care expenses, in part because they live longer than men.
- Women in general have less retirement savings, pension income, investments and social security benefits.
- Poverty levels are higher for unmarried older women compared with those who are married.



Membership is FREE!

To all those who sign up as members on www.wiseinvestors.org.

Benefits are:

- Discounts to workshops and events
- Volunteer opportunities in the community
- Networking with like-minded women
- Alerts through emailed newsletters
- Promotions of upcoming meetings

Sponsoring Opportunities:

- Corporate Sponsorship
- Educational Sponsorship
- Individual Sponsorship

For more information, contact WISE® at:

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Website: wiseinvestors.org

