Presentations by Dr. Miranda Reiter

Financial Professional-Focused Presentations

*All presentations can be formatted to engage with a variety of audiences.

1. **State of the Art: The Past, Present, and Future of Diversity, Equity, and Inclusion Financial Planning Research:** *CFP & AFC CEU Eligible*

   Increasingly, efforts have been established to promote diversity, equity, and inclusion (DEI) in the financial planning profession. Still, there is a lack of women, Black, and Latinx financial planners. Luckily, research can shed light on these issues, providing well-founded insights and allowing us the opportunity to impact a growing, dynamic profession directly. This presentation aims to provide an overview of the history of DEI research in financial planning, explain the major findings of contemporary DEI research, and share the areas of opportunity for future studies to improve the profession continuously.

2. **How to Create a More Diverse and Inclusive Culture in the Financial Planning Workplace:** *CFP & AFC CEU pending*

   An inclusive workplace culture creates a safe working environment that attracts diverse candidates and clients, increases employee retention, and improves overall morale. This presentation will cover the importance of diversity, equity, and inclusion initiatives being led from the top and provide tangible steps that firm leaders can take to create and sustain these efforts, from creating a welcoming environment to leading practices for working with diverse clients and employees.

3. **Cultural Competencies for Financial Professionals who Serve Diverse Clients & Communities:** *CFP & AFC CEU Eligible*

   Cultural competency is the idea that one is aware of their and others' cultures and can successfully apply this knowledge in working with others. This presentation covers what it means to be culturally competent and its associated advantages, understand why it matters, how to master cultural competencies, and how to apply culturally aware strategies to help them be more effective and have better relationships with diverse clients and communities.

4. **The Racial Wealth Gap, Retirement, & Diversity in Financial Planning:** *CFP & AFC CEU pending*

   This presentation brings together three topics at the forefront of contemporary financial planning conversations. We will discuss the state of diversity in the financial planning industry, the racial wealth gap, and the implications of serving diverse clients.

Client and Employee-focused Presentations

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1. **Six Strategies to Successfully Managing Your Money**

Have you ever found yourself wondering where all your money went? Does saving and investing seem complicated and intimidating? Have you ever been in debt? Do you know how a credit score is calculated? The world of money and personal finance can seem purposefully confusing, but this presentation provides a game plan for getting your financial house in order. By putting a money management system in place, you'll have confidence that you're spending your money on the things you value to develop a plan for your financial future.

2. **Women & Finances: Build Your Confidence to Invest & Grow Your Money**

Statistics show that women are less confident than men with investing, but women may actually be better investors. This presentation discusses women's unique financial challenges, how they can overcome these barriers, why women should invest, and how they can successfully build confidence in their finances and grow their money.