Presentations by Lazetta Rainey Braxton

1. How to Stay Relevant in an Increasingly Diverse Environment: Recognizing the Value of Cultural Competency

➔ *Type of Presentation:* Keynote, Workshop, Breakout session, or Webinar
➔ *Audience:* Financial professionals, Clients, Global employees
➔ *Platform:* Virtual or Live
➔ *Time:* 45 minutes, 60 minutes, 90 minutes, 2 hours, half day, full day
➔ CE Eligible: Yes

SUMMARY: Diversity and inclusion offers optimal returns for companies, their employees, customers, and stakeholders. Identifying the importance of understanding cultural values and attitudes for effective financial planning engagement helps financial advisors uncover the planning needs of racially-diverse clients.

This presentation covers important topics like:

- How behavioral psychology, such as a client's comfort zone, impacts a client's objectives, goals, understanding, decision making and actions
- Who represents the next wave of racially diverse clients, using African Americans and their evolving personal financial needs and objectives as a representative population
- How to better understand this next-gen client's cultural values and attitudes to ensure alignment with a planner's recommendations
- How to build trust through understanding their unique challenges and opportunities

2. Financial Planning for the Rest of Us: A Holistic Guide to Building Wealth

➔ *Type of Presentation:* Keynote, Workshop, Breakout session, or Webinar
➔ *Audience:* Financial professionals, Clients, Global employees
➔ *Platform:* Virtual or Live
➔ *Time:* 45 minutes, 60 minutes, 90 minutes, 2 hours, half day, full day
➔ CE Eligible: Yes

SUMMARY: Contrary to popular belief, financial planning is for the rest of us-not just the 1%. Lazetta believes everyone should have confidence in their finances and a financial plan that helps them live a secure and abundant life. Money should support your vision for your life, not control it. The journey to abundant living requires the courage and desire to live the life and legacy you deserve.

This presentation covers important topics like:

- Identify and conquer Money FOGS: Fear, Obligation, Guilt and Ahame around money
- How to make the most out of what you have
- How to clarify your commitments and achieve your goals in ways that reflect your needs and values
- Understanding the basics of building your financial plan and team

3. When RIAs and Their Clients Mind Their Businesses: A Partnership in Growing Sustainable Enterprises

- ➔ *Type of Presentation:* Keynote, Workshop, Breakout session, or Webinar
- ➔ *Audience:* Financial professionals, Clients, Global employees
- ➔ *Platform:* Virtual or Live
- ➔ *Time:* 45 minutes, 60 minutes, 90 minutes
- ➔ CE Eligible: Yes

SUMMARY: With the rising number of self-employed individuals and business owners, this market segment represents an attractive client base for RIAs. RIAs are well-positioned to demonstrate their value to business owners as trusted financial advisors and as fellow entrepreneurs. In this session, we'll mirror the financial planning process to the business planning process and share tangible steps for RIAs to guide their clients (and themselves!) with growing sustainable enterprises.

This presentation covers important topics like:

- Determining the key points to examine in the core areas of financial planning, specifically as they relate to business owners
- Designing a financial planning process that encourages ongoing review and relevant advice for business owners
- Helping business clients begin with their exit in mind

4. Invest in the Change You Seek: Start with You, Your Money, and Your Time

➔ *Type of Presentation:* Keynote, Workshop, Breakout session, or Webinar
➔ *Audience:* Financial professionals, Clients, Global employees
➔ *Platform:* Virtual or Live
➔ *Time:* 60 minutes, 90 minutes
➔ CE Eligible: No

SUMMARY: As financial advisors, not only do we want equal access to opportunity, we also want co-ownership of, or equity in, opportunities to build and sustain wealth. Collective economic power is a core catalyst for funding social change, and you can be part of the movement.

This presentation covers important topics like:

- Defining the wealth gap and the lack of access to capital for marginalized communities.
- Exploring how collective economic power be used to fund social change
- Discovering ways to contribute to or invest in the change you seek
- Motivating colleagues to join forces together

5. Charging Ahead with Care and Courage: Empowering Strategies in Navigating the DEIB Journey

➔ *Type of Presentation: Keynote, Workshop, Breakout session, or Webinar*
➔ *Audience: Financial professionals, Clients, Global employees*
➔ *Platform: Virtual or Live*
➔ *Time: 45 minutes, 60 minutes*
➔ *CE Eligible: No*

SUMMARY: How can allies, and in particular women, care for themselves while tending to the incredible task of elevating Diversity, Equity, Inclusion, and Belonging (DEIB) efforts in the financial services industry? Lazetta shares key pieces of information that have helped her forge ahead with care and courage and the three charges she has for DEIB allies.

This presentation covers important topics like:

- Rebalancing the scales between leading the charge and carrying the load.
- How the industry's DEIB journey continues to measure up, and where the road leads from here

- How allies can and should use their privilege and access for the greater good
- How to prepare yourself emotionally and financially for the next stage of the journey