Moving forward on your own; Managing your financial affairs through the 3 stages of widowhood Grief, Growth and Grace:
Focusing on financial matters can be the last thing on a widows mind, but it a critical piece that must be addressed. This talk will discuss ways widows can get organized and focus their attention on what matters from a financial perspective as they move through the grieving process.
**Please note this workshop will be based on Canadian financial markets and concepts*

Moving Forward on your Own: Charting your new financial path
This presentation will be a hands on workshop that will dive into financial planning strategies specifically for widows. Through case studies, we will learn how to practically apply basic financial concepts such as creating a net worth statement, how to analyze your cash flow and setting up financial goals for success. The workshop is designed to give a widow the skills needed to be confident with their own financial path as they move forward on their own.
**Please note this workshop will be based on Canadian financial markets and concepts*

Charlotte Paul is a financial advisor and the leader of Perspective Wealth Management of Raymond James. She helps women maintain – or re-establish – financial wellbeing during times of transition (like divorce or the loss of a spouse). She also works with, and advises, small charities and private foundations.

Charlotte has personally had to navigate times of major transition – including the loss of a partner – which has given her a unique understanding of the fears, emotions, and challenges women face at these critical times. Her goal is to help women establish independence and financial wellbeing so they can live life to its fullest and achieve the goals they've set for themselves and their families.

Charlotte's career in finance began in 2003. After spending four years working in retail banking, she moved to a sales role with top-tiered Canadian mutual fund company where she remained for nearly a decade. During that time, Charlotte worked with more than 1500 financial advisors – which allowed her to study, and gain a deep understanding and respect for, what makes a truly outstanding financial advisor.

Charlotte holds a Bachelor of Arts from the University of Victoria, has her Chartered Investment Manager (CIM) designation through the Canadian Securities Institute and is a Certified Divorce Financial Analyst (CDFA)

Originally from British Columbia, Charlotte has lived in Toronto since 2015. When not at work she enjoys spending time with her English bulldog, Benedict, and exploring all of the exciting things that Toronto has to offer.