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Retirement Daily Roundtable: Women, Money & Retirement

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In this Women's History Month roundtable discussion, experts discuss what women need to know about retirement planning, investing and all things money.

In this Women's History Month roundtable discussion, Liz Miller, president and founder of Summit Place Financial Advisors and chair of the CFP Board's Board of Directors, and Marcia Mantell, president and founder of Mantell Retirement Consulting, joined Robert Powell, editor of Retirement Daily, to discuss what women need to know about retirement planning, investing and all things money.

In the roundtable, Miller, Mantell and Powell discuss:

1. What baby boomer women, women 10+ years away from retirement, and early career women need to know about money and saving for retirement.
2. What LGBTQ+ women need to know about balancing saving for retirement and building a family.
3. Managing caregiving costs for yourself and others, including costs associated with unpaid caregiving.
4. Vehicles such as traditional IRAs and 401(k)s, Roth IRAs and 401(k)s, HSAs, 403(b)s, target date funds, and more.
5. Cryptocurrency.
6. Verifying financial information generated by AI.
7. Navigating financial advice on social media. (Pro tip: Look for credentials.)
8. Finding online financial education through banks and financial firms.
9. The importance of working with a financial professional and how to find the right fit for you.
10. Concrete action steps for you to take today.

Miller and Mantell underscore the importance of working with an informed financial professional throughout all stages of the journey. Whether you're taking time out of the workforce for caregiving or deciding which savings vehicle is right for you, a financial professional can help. Many CFP professionals are offering pro bono hours and income-based rates. “There is absolutely a professional out there that wants to help you,” Miller states.

Don’t miss out! Watch the roundtable above.