

FIDELITY WEALTH MANAGEMENT **WEBINAR**

Planning during uncertainty:

Retirement and other goals



Our Speakers



Lorna Kapusta
Head of Women and Investing, Fidelity Investments

Lorna is head of Women and Investing at Fidelity Investments in Boston, Massachusetts. In her role, Lorna is responsible for a firm-wide initiative committed to empowering women investors to become more actively involved in their finances at every life stage. She regularly speaks to women across the country about the opportunity and impact of financial engagement and is often quoted in the media sharing Fidelity research, resources, and action steps to help women take control of their financial future.



Viktor Misko
Vice President, Wealth Planner, Fidelity Investments

Viktor Misko is a CERTIFIED FINANCIAL PLANNER™ professional. In his role as a VP Wealth Planner, Viktor partners with clients to understand family dynamics so that he can create and implement lifetime financial plans. He's been in the financial services industry for the past 15 years, over 10 of which were with Fidelity. Prior to coming to Fidelity, he spent time at Merrill Lynch and Morgan Stanley. Viktor holds a bachelor of science degree from the University of Central Florida. Born and raised in Eastern Europe, he was the first in his family to immigrate to the United States at the age of 16 to attend college.



Jodi Coochise
PhD, Psychologist and Consulting Partner, Fidelity Center for Family Engagement, Fidelity Investments

Dr. Jodi Coochise is a licensed psychologist and executive coach who divides her time between a clinical practice, coaching business leaders, and consulting with teams on how to integrate psychological concepts into their work. In her private practice, she works with individuals and couples on a variety of issues and offers specific expertise to those who are working through grief. Jodi's nonclinical work includes executive coaching where she works alongside her clients to identify areas for growth and change. She also consults advisors in the financial industry about integrating Behavioral Finance principles to help strengthen client relationships.



Three Guiding Principles for Uncertain Times

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Principle 1: Avoid reactivity

- ▶ Check in with yourself and processing your emotions
- ▶ Have perspective and engaging thoughtfully
- ▶ Work with your advisor to understand your options

Principle 2: Adopt a proactive mindset

Principle 3: Step back and look at your larger life circumstances in a systematic way



Frequently Asked Client Questions

How Fidelity Can Help

Support from a Fidelity representative

- ▶ Provides education and guidance with regard to common wealth planning strategies
- ▶ Answers questions you and your family may have regarding your evolving needs and goals
- ▶ [Fidelity.com/FindAnAdvisor](https://www.fidelity.com/FindAnAdvisor)

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