

We create a welcoming environment that inspires women to become more involved in their financial future

The Problem:

Retirement planning is important for everyone, but possibly even more important for women. Yet, most women do not have a financial plan to help them properly prepare and if they do, they may not be very familiar with it. While many women may feel that they are too busy to be part of the financial planning process, there are a variety of compelling reasons why they should get involved today.

The Solution:

A new experience is needed to engage women to be more involved in their finances. Women of Clarity™ provides a new environment where women will be motivated and empowered to learn. Our approach will not only inspire women to get started, but it will keep them engaged without monopolizing their free time.

Clarity Wealth Process™

We have created a simple but powerful three- step process that provides the clarity you need to make smart financial decisions.

Create Your Lifestyle Wealth Plan

We will design a lifestyle Wealth Plan for you that outlines the steps to take on your journey toward living the life you desire.

Incorporate Our Balanced Investment Strategy

We delicately balance your goal for safety with a need for income and growth, enhancing your overall sense of financial security.

Join Our Financial Empowerment Program

We educate, challenge, and encourage you to know what is needed to take charge of your financial life.

To learn more about the Women of Clarity program, please visit:
roundtablewealth.com/who-we-serve/women-of-clarity/

For educational resources to help you get started, visit:
roundtablewealth.com/women-of-clarity-resources/

We offer a differentiated client experience that helps you get started and be more involved in financial decisions

Reasons why you should get involved:



Why Women?

Growing up, my mother was the hardest working woman I knew. She was the rock of our family. After my father suffered from several heart attacks, the burden on my mom doubled. Her greatest stress was financial, driven by her fear of not having enough to provide for and protect her children.

When I became a financial advisor, I naturally gravitated toward helping women. While the industry was focusing on men, I wanted to make working with women a priority. I wanted them to know that I cared about their future, and help provide a safe and encouraging environment where they could discuss their concerns, ask questions, and feel supported. I wanted to be the advisor that my mother never had.

That is why I feel my true purpose as a financial advisor is to create a welcoming environment that inspires women to become more involved in planning for their financial future. I strive to empower women to become more confident in their ability to make smart financial decisions and to live the life they want and deserve.



Mariella Foley
CFP®, ADPA®, CDFA®
Wealth Advisor

Mariella Foley, a Partner and Wealth Advisor with Round Table Wealth Management, has been with the firm since 2000 and has over 25 years of experience in the financial services industry. Her responsibilities include all aspects of wealth management such as investments, income taxes, cash flow management as well as overall financial decision making for her clients. Mariella leads Women of Clarity™ and speaks at local events, where she emphasizes the importance of women being involved in their finances and teaches women how to get started.



ROUND TABLE

WEALTH MANAGEMENT

FAMILY WEALTH ORGANIZER

Client Names: _____

DATE: _____

SUMMARY

The information contained in this binder is intended to help organize our affairs and its purpose is to help locate or identify certain information that may become necessary in the event of our incapacity or death.

NEW JERSEY OFFICE:

241 North Avenue W.
Westfield, NJ 07090
(908) 789-7310

NEW YORK OFFICE:

145 West 57th Street, Floor 14
New York, NY 10019
(212) 257-4369

FLORIDA OFFICE:

980 North Federal Highway, Suite 110
Boca Raton, FL 33432
(561) 569-8240

OREGON OFFICE:

1001 SW Emkay Drive, Suite 100
Bend, OR 97702
(908) 374-2561

Introduction

The personal, legal and financial information contained in this binder is intended to help organize our affairs and its purpose is to help locate or identify certain information that may become necessary in the event of our incapacity or death.

Since the information contained herein is subject to change, please know that it is materially complete and accurate only as of the last date of revision.

However, our Financial Advisor, Round Table Wealth Management, is intimately familiar with our entire financial situation and can be the one call to provide assistance, coordination and advice during this time. Therefore, more current records may be available through our contact there:

Round Table Wealth Management

241 North Avenue W, Suite 300
Westfield, NJ 07090
P: (908) 789-7310
F: (908) 374-2590

Our primary contact there is:



Mariella Foley, CFP®, CDFA®, ADPA®

Wealth Manager

e-Mail: mariella@roundtablewealth.com

IRS CIRCULAR 230 DISCLOSURE: Treasury Regulations require us to inform you that any Federal tax advice contained in this communication (including any attachments) is not intended or written to be used, and cannot be used, for the purpose of (i) avoiding penalties under the Internal Revenue Code or (ii) promoting, marketing or recommending to another party any transaction or matter addressed herein.

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This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

Instructions

During the first few days, weeks or even months following our incapacity or death, the following list of preferences should be known to our survivors, executors and beneficiaries. While not intended to contradict instructions in a will, this section is intended to clarify or supplement those instructions. Refer to the "Location of Vital Documents" section in this organizer for more information.

(Burial/Cremation preferences, Funeral/Religious/Memorial Service preferences, information to be included in any public notices, obituaries or epitaphs, and organ/tissue/body donation, etc.)

Client 1

Client 2

Signatures

/s/ Client 1

/s/ Client 2

[illegible][illegible]

Contact and Biographical Information

FAMILY MEMBERS

IMMEDIATE FAMILY

Husband Client

Address:

H:

M:

e-M:

e-M2:

DOB:

SSN:

Children Child 1

Address:

H:

M:

e-M:

DOB:

SSN:

Child 3

Address:

H:

M:

e-M:

DOB:

SSN:

Wife Client

H:

M:

e-M:

e-M2:

DOB:

SSN:

Child 2

Address:

H: (

M: (

e-M:

DOB:

SSN:

Child 4

Address:

H:

M:

e-M:

DOB:

SSN:

Extended Family (Parents and Siblings) and Others who Depend on Us

Name:

Address:

H:

M:

e-M:

DOB:

Name:

Address:

H:

M:

e-M:

DOB:

Business and Professional Contacts

WEALTH MANAGER AND INVESTMENT ADVISOR

Round Table Wealth Management

241 North Avenue W, Suite 300

Westfield, NJ 07090

P: (908) 789-7310

F: (908) 374-2590

Primary Contact:

Mariella Foley, CFP®, CDFA®, ADPA®

Wealth Manager

e-Mail: mariella@roundtablewealth.com

Personal Contact:

Other:

Trustees:

Accountant:

ATTORNEYS

Insurance Agent

Property & Casualty (NJ)

Insurance Agent

Property & Casualty (RI)

Life Insurance

Disability/Long-Term Care Insurance

Medical

Primary



Facts and vital information about our lives and the lives of those closest to us.
(Children, parents, etc.)

Location of Vital Documents

Birth Certificates, Adoption Certificates, Name Change Documents:

Marriage Certificates and Religious Records (Baptism, etc.) or Divorce, Annulment or Separation Documents:

Social Security Cards, Passport/Citizenship or other Military Identifications:

Title/Deeds to Homes, Cars and Other Significant Tangible Property:

Safe Deposit Box (Bank Branch and Address, Co-owner or Agent) and Key Location:

Durable Power of Attorney:

Life Insurance Policy Binders/Certificates:

Blank/Unused Checks and/or Credit Cards:







The following is a list of our Memberships (Civic, Social, Recreational, Charitable, Religious, Professional, Fraternal, Educational) Interests and any accrued benefits at the current time:

Service Providers

The following is a list of Service Providers who may need to be contacted in order to stop or continue (as needed) providing services to us:

Primary Residence

Landscaping:

Pool Services:

Housekeeping:

Car Maintenance:

Security/Alarm Company (including security code):

Utilities (attach a recent copy of a bill(s)):

Other Residence

Address:

P:

Landscaping:

Pool Services:

Housekeeping:

Car Maintenance:

Security/Alarm Company (including security code):

Utilities (attach a recent copy of a bill(s)):

Other Key Contacts:

Estate Planning Documents

Copies of the following documents have been included in the Appendix with a note indicating the current location of the original document(s):

Last Will & Testament (dated)

Original Located:

Durable General Power of Attorney (dated)

Original Located:

Living Will and Health Care Treatment Power of Attorney (dated)

Original Located:

Last Will & Testament (dated)

Original Located:

Durable General Power of Attorney (dated)

Original Located:

Living Will and Health Care Treatment Power of Attorney (dated)

Original Located:

Most Recent Gift Tax Return

Digital Information

We recognize that quite a bit of our information, correspondence and effects are stored “digitally,” i.e., e-Mail correspondence, on-line access to financial records, and family photos.

A great deal of the information is stored and aggregated in/on:

The following is a list of pertinent Usernames and Passwords (many of which are aggregated as described above):

Website URL:

Username:

Password:

Information Available:

Website URL:

Username:

Password:

Information Available:

Website URL:

Username:

Password:

Information Available:

Website URL:

Username:

Password:

Information Available:

Website URL:

Username:

Password:

Information Available:

Non-critical Information and Accounts

E-Z Pass (Customer Service: 800 288-2865)

Account Number:

Password/Security Code:

Frequent Flyer Miles

Airline/Account Number:

Password/Security Code:

Credit Card

Issuer/Account Number:

Password/Security Code:

Credit Card

Issuer/Account Number:

Password/Security Code:

Credit Card

Issuer/Account Number:

Password/Security Code:

Retailer/Frequent Shopper

Retailer/Account Number:

Password/Security Code:

Retailer/Frequent Shopper

Retailer/Account Number:

Password/Security Code:

Retailer/Frequent Shopper

Retailer/Account Number:

Password/Security Code:

Other Information

Collectibles:

Art Work:

Other Warranty Records or Product Guides:



Appendix A

Round Table Wealth Management Planning Tips

STORAGE OF THIS BINDER

The information contained in this binder is personal and confidential. Put it in safekeeping and treat it as you would any other confidential document, but make sure the people who need it would be able to gain access to it.

UPDATE AND MAINTAIN THIS BINDER

Contact Round Table Wealth Management in the event that you need to make important or material changes to this organizer. In any event, the material should be reviewed periodically for accuracy.

If you are adding information, complete the easiest topics first, then the essential ones, then the more complex ones and finally the most difficult ones (such as a letter or other instructions). Such a progression may make the task seem less daunting.

SAFE DEPOSIT BOXES

Do not store certain vital documents (wills, trust instruments, or powers of attorney) in a safe deposit box. Often times, if the document that gives a person authorization to open the box is stored in the box, and if the box is sealed, there may be a lengthy process or delay in obtaining those documents. If no one else is authorized (like a co-owner or agent) to open the box, you might even have to secure a court order to open the box, which may take time and money. It can also be a good idea to store a photo of the contents of your box somewhere. A power of attorney does not allow access to a safe deposit box.

Do not store cash in a safe deposit box. If the cash is needed for liquidity after one's death, and there is a delay in opening the box (see above), the cash is useless. Additionally, the contents of safe-deposit boxes can be destroyed, as they were during the World Trade Center attack and Hurricane Katrina. Furthermore, the contents of a safe deposit box are not insured (by either the FDIC or your homeowners policy), and are generally specifically excluded from protection in the renter's contract itself.

Lastly, if the IRS suspects unusual activity (like attempted tax evasion – after all, cash in a safe deposit box can be perceived as an attempt a “hiding assets”), it can freeze your assets, including those held in your safe deposit box. Emergency cash reserves are important, but should be stored intelligently.

Appendix B

List of Automobiles:

List of Collectibles:

List of Artwork:

Location of Vital Documents:
