

For more information:  
Katy Ufferman  
Maxwell Financial Management  
Work: (614) 431-4345  
[kufferman@maxwellfm.com](mailto:kufferman@maxwellfm.com)  
[www.maxwellfm.com](http://www.maxwellfm.com)

### **For Immediate Release**

## **Maxwell Financial Offers Seminar on Family Love Letter May 11 Helping you plan and organize your financial wishes**

*Sign up for an informative virtual session to learn how to organize your financial plans to leave your family prepared in the event of death or disability*

NEW ALBANY, OH (April 28, 2022) – None of us want to think about the death of a loved one. [Maxwell Financial Management](http://www.maxwellfm.com) is hosting a seminar on a new wealth transfer program called the Family Love Letter on Weds. May 11 from 11:30 a.m.– 12:15 p.m. It is open to the public and during the presentation Katy Ufferman, chartered financial consultant (ChFC) will share details about how to get started with financial planning before a crisis like death or disability strikes as well as financial matters that need to be taken care of after death. To register for the seminar, please email [kufferman@maxwellfm.com](mailto:kufferman@maxwellfm.com)

According to the U.S. Census Bureau, current population survey:

- 77% of married women will outlive their husbands<sup>1</sup>
- 9 in 10 women will be solely responsible for their own family's finances at some point in their lives<sup>2</sup>
- 90% of heirs change their financial advisors after receiving their inheritance<sup>3</sup>

In the discussion, Ufferman will explain the process, and a roadmap to follow to develop a plan and avoid inadvertent mistakes that can occur in the confusion and grief following an accident or death.

Dealing with the death or the disability of a loved one is stressful; not knowing what to do with the deceased's finances in the aftermath imposes an additional burden on a family, Ufferman explains. The intergenerational wealth transfer program helps individuals create a Family Love Letter, which can be shared electronically or in a workbook, to keep track of important documents and your wishes, including the Family Love Letter Workbook, Life Events Checklist and Anticipating the Unexpected and Surviving Spouse Checklist.

---

<sup>1</sup> U.S. Census Bureau, Current Population Survey, 2016.

<sup>2</sup> ICMC "Why we need to bridge the financial literacy gap between women and men," 2016.

<sup>3</sup> Davidson, Alex. "Financial Advisers Try to Hold On to Business After Clients Die." The Wall Street Journal, 2016.

Maxwell Financial Management's goal is to help its clients plan, prepare and save for the future they want. The Family Love Letter is an extension of other wealth management services we offer to clients around the country. For more information, please visit <https://www.maxwellfm.com/women-investing>

Securities and advisory services offered through LPL Financial, a registered investment advisor.  
Member FINRA/SIPC

# # #