

## August 2018

Lauren was interviewed for Financial Planning magazine to help with a story about clients who don't have children with assisted living decisions: <https://www.financial-planning.com/news/financial-advisors-help-childless-adults-find-assisted-living-facilities>

## May 2018

Lauren was interviewed for an article on Lending Tree for how to reign in spending. A link to the article may be found here: <https://www.lendingtree.com/debt-consolidation/how-to-control-your-spending/>

## April 2018

Lauren Lindsay was quoted in an article for the Magnify Money blog, about how to financial children's extracurricular activities. The link to the article may be found here: <https://www.magnifymoney.com/blog/news/how-to-make-your-childs-expensive-activity-fit-your-budget672424722/>

Joan Cox was quoted in The Wall Street Journal on April 18, 2018. The article was titled Mistakes in budgeting for retirement spending can be hard to recover from, It covered many topics including Joan's contribution about medical care costs in retirement. Click on the link below to read the article <https://www.wsj.com/articles/where-retirees-underestimate-spending-1524061487>

## March 2018

Joan Cox was honored on March 11, 2018 at the annual event for the Jewish Endowment Foundation of Louisiana. She received the Endowment Achievement award. This award is presented annually to members of the lay community who, through their leadership, vision and dedication have helped in the successful growth of their Jewish community endowment funds.

## February 2017

Joan Cox earned the designation of Certified Financial Transitionist® (CeFT®) after 2 days of testing and with roughly 100 hours of preparation over a 15 month period. CeFT®s are part of an elite community of about 150 advisors nationwide willing to make a clear commitment to excellence and continuous learning in the area of Financial Transitions Planning. For more

information refer to Joan's biography.

## **September 2017**

Lauren was one of 30 advisors who presented in the online Wealth Summit on September 4th. She discussed the importance of planning your funeral and questions related to the topic. The interview can be viewed on our website.

## **September 2017**

Lauren was featured in an article in Marketwatch about working with clients in the aftermath of Katrina. She was interviewed for this article 2 weeks before Harvey hit, so they circled back to touch base with her after that as well: [http://www.marketwatch.com/story/this-advisers-experience-helping-clients-through-katrina-is-helping-her-after-harvey-2017-09-01?mod=fa\\_center](http://www.marketwatch.com/story/this-advisers-experience-helping-clients-through-katrina-is-helping-her-after-harvey-2017-09-01?mod=fa_center)

## **June 2017**

Lauren was quoted in an article on vacation spending that ran online in Marketwatch and also in the New York Post: <http://www.marketwatch.com/story/75-of-americans-have-done-this-to-pay-for-a-vacation-2017-06-21>

## **May 2017**

Lauren and Joan attended the Invest in Women conference in Dallas and Lauren also attended the Inside Retirement conference as well. Lauren was a speaker on a panel that discussed working with your family, as she was in practice with her mother, Linda Gadkowski, until she retired.

## **March 2017**

On March 27, *The Wall Street Journal* published an article Lauren wrote about funeral planning. She has had hundreds of emails from people all over the country asking for copies of the worksheet, which may be found in the [Forms](#) section of this website.

## **February 2017**

Lauren was featured in a story about how couples handle their marital assets. She discussed

the goal-setting process they go through with both clients at the start of the financial planning process. This story was published at KHOU online: <http://www.khou.com/money/magnify-money/were-married-and-we-still-keep-our-finances-separate/406829105>

## **January 2017**

Lauren was published in the Wall Street Journal with a story about the importance of funeral planning. She has created a worksheet to help document your wishes, which can be found in the Forms section of our website. The story can be found here: <http://www.wsj.com/articles/funeral-planning-its-not-fun-but-its-necessary-1483460212>

## **November 2016**

Joan was interviewed for an upcoming article in AARP magazine about social security.

## **October 2016**

Joan attended the NAPFA Fall Conference. Additional knowledge was gained in the areas of planning for aging, current issues in income tax planning, transition planning for the new social security rules and new technologies.

## **October 2016**

Lauren was interviewed by Benjamin Holloway of Apply with Sanity about how to talk to your parents about money. Some great advice for families trying to communicate about this important topic: <http://www.applywithsanity.com/blog-1/2016/10/21/how-to-talk-to-your-family-about-money>

## **July 2016**

Lauren was featured in NAPFA Advisor Magazine, in an article by Marie Swift titled "Oozing Credibility". It is part of Swift's series titled "Marketing Playbook" and this section discussed "earned media" and how best to use in your practice.

## **June 2016**

Bob, Joan and Lauren were all selected among the 2016 Best Financial Advisors for Medical Professionals, by LeverageRx, a website which helps the [medical profession with financial issues](#)

Bob and Lauren were also featured on their blog in a story titled ["Four Major Money Traps Physicians Fall Into \(and How to Avoid Them\)"](#)

## **May 2016**

Lauren attended the "Women and Investing" and "Retirement Planning" conferences in Dallas, sponsored by Financial Advisor magazine. While there, she met with Dorothy Hinchcliff, the Executive Editor for the magazine, and was asked to be a presenter at next years "Women and Investing" conference in May, 2017.

## **March 2016**

Lauren authored an article for Financial Planning magazine titled ["Roll up your sleeves: Volunteering locally can pay off"](#) about her local volunteering and the connection between that and being a fee-only financial planner.

## **February 2016**

Lauren was interviewed for the Jan/Feb edition of "Money Magazine" about spending and sticking to a budget. She suggested [targeting "hot button" items and setting a strict spending limit, using cash if you must](#)

## **January 2016**

Lauren Lindsay authored an article in Financial Planning magazine about [spelling out funeral wishes](#)

## **MARCH 2015**

Lauren Lindsay was quoted in an article in [US News and World Report](#) about secure retirement planning.

## **OCTOBER 2014**

Joan will be attending the NAPFA fall conference the week of October 20th.

Congratulations to our very own Joan Cox for being selected a Five Star Wealth Manager this year! Candidates are nominated by their peers and then reviewed based on a number of credentials by Five Star Professionals, which is approved by the SEC and FINRA, our regulating bodies. Joan was selected as a top advisor in the New Orleans market. Congratulatory as featured in [New Orleans Magazine](#).

## **SEPTEMBER 2014**

On September 25th, Lauren attended the day-long Financial Planning Association Symposium presented by the Houston FPA Chapter. She attended seminars presented by David Blanchett of Morningstar on "Portfolio Optimization" which discussed factors like career sector when considering how to structure a portfolio. She also attended several sessions with Dr. Wade Pfau of the American College, and Michael Kitces, of The Pinnacle Advisory Group, who have done some groundbreaking research in how portfolios should be structured in retirement: with more equity positions, not less. Lauren thought it was wonderful to be in the company of some of the greatest minds in investment research--not to mention very inspiring. Bob is currently working their "Glidepath" strategy into PFA client portfolios.

## **April 2014**

Joan Cox was featured in [Plan It \(Downsize House, Reap Savings\)](#) .

Lauren Lindsay was featured in [The Wall Street Journal](#) .

## **MARCH 2014**

Lauren Lindsay was interviewed in the [March issue of Kiplinger's](#) in a story about the benefits of working longer, which also featured one of our wonderful clients!