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Your Dreams, Your Plans:
WEALTH MANAGEMENT SERIES

May 8 - *Considering Socially Responsible Investing As Part Of Your Plan*

Presented by Jill Menuck and Steven Dray

Jill Menuch Esq. of Holtzman & Menuck Jill is an attorney by training who has counseled a wide range of corporate clients as well as individuals since her graduation in 1995 from the University of Michigan Law School. While working at a large Detroit firm, Jill focused on corporate real estate law, and then turned her attention to advising individuals at a boutique firm in Birmingham where, for seven years, she advised clients on estate planning, tax matters, corporate formation, business planning, and bankruptcy. Holtzman & Menuck offers a unique concierge service, combining one-on-one sessions so that clients define goals and priorities, map current financial positions and establish a clear understanding of basic investing and long term planning options, and a succinct process to create a wealth plan.

Steven Drey is a Senior Portfolio Manager at Zevin Asset Management. Steven Dray works closely with high net worth families and not-for-profits to manage their wealth with a goal of achieving both their social and financial objectives. As a Certified Financial Planner™ practitioner, Steven is trained in providing holistic counseling to his clients on topics including investments, taxes, estate planning, retirement, and insurance. Before joining Zevin, Steven enjoyed a 20-year career as a portfolio manager and investment analyst at investment firms including OppenheimerFunds, MassMutual, and David L. Babson, where he managed customized stock portfolios and mutual funds on behalf of both institutional and individual clients. Steven is proud to work at Zevin Asset Management, a 100% employee-owned, majority women-owned firm. As a Certified B Corporation™, Zevin holds itself to the same high standards in which we hold the companies we invest in.

Questions about other LWN programs?
Please contact **Dian Martin,** LWN Coordinator
dmartin@agassiz.org or (617) 528-0643

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May 22 - *Key Ideas For Managing Risk with Insurance*

Presented by Arlene M. Holtzman, J.D., LLM. of Holtzman & Menuck and Barbara Targum of Dwight Rudd Insurance

Arlene Holtzman is an attorney by training who focused on philanthropic advising for 18 years. While working with Oxfam America, Children's Hospital, Boston, simmons College, and other non-profit organizations, Arlene met with hundreds of individuals around the country to help design substantial, creative, and effective wealth plans that include individual philanthropic goals. Holtzman & Menuck offers a unique concierge service, combining one-on-one sessions so that clients define goals and priorities, map current financial positions and establish a clear understanding of basic investing and long term planning options, and a succinct process to create a wealth plan.

Barbara Targum is a Managing Partner at Dwight Rudd Insurance, having joined Dwight Rudd in 2008. Ms. Targum is a Certified Insurance Counselor and specializes in the risk management needs of affluent families and successful businesses. A member of the Boston Estate Planning Council, Ms. Targum takes a comprehensive and analytical approach to her client relationships, working with them to craft a customized program to meet their needs. Particular emphasis is placed on insuring against the risk of catastrophic financial loss with sufficient levels of liability protection, appropriate deductibles to contain cost, and self-insurance where appropriate.

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