



ORANGE COUNTY BAR ASSOCIATION

Mommy Esq. Committee Presents

Do I Need a Financial Plan and Where Should I Start?

An OCBA Mommy Esquire Monthly Meeting

Financial planning is the key to a successful financial future. Mommy Esquire is happy to welcome Christopher Bieler, a Financial Planner and Adviser, and Christina Ahluwalia, a Financial Services Professional, to provide us with financial planning basics, including: Where to Start with Financial Planning, Self-Directed Planning vs. Working with an Advisor, Types of Advisors and the Selection Process, College Funding, and Student Loans. In their professional roles, Christopher and Christina guide clients in defining their financial objectives and developing a strategy that will allow clients to achieve those objectives, while empowering clients with the knowledge and tools needed to achieve their financial goals.

Please join Mommy Esquire for this informative event to jump start your financial planning in 2020!

Speakers:



Christina Ahluwalia
Financial Services Professional



Christopher Bieler
Financial Planner and Adviser

Tuesday, January 21, 2020

Registration: 11:30 AM • Program: 12:00 PM - 1:00 PM

OCBA Headquarters

4101 Westerly Place, Newport Beach 92660

Complimentary Lunch Provided.

TO RESERVE YOUR SPOT:

Register online at www.ocbar.org or
email events@ocbar.org

