

S&P 500 4,495.70 +84.15 (+1.91%)	Dow 30 34,827.70 +489.83 (+1.43%)	Nasdaq 14,094.38 +326.64 (+2.37%)	Russell 2000 1,796.12 +90.62 (+5.31%)	Crude Oil 78.23 -0.03 (-0.04%)	Gold 1,967.80 +17.60 (+0.90%)
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CISION

Advanced Estate Planning and Generational Wealth Join us for Savvy Women Lunch and Learn



PR Newswire

November 7, 2023 · 4 min read



Hosted by The Diamond Group Wealth Advisors, This Seminar Will Shape Your Future, Unlock Your Legacy and Preserve Your Wealth

SAN RAMON, Calif., Nov. 7, 2023 /PRNewswire/ -- The Diamond Group Wealth Advisors is pleased to announce its **Savvy Women Lunch and Learn** event focusing on Advanced Estate and Legacy Planning, on **Friday, November 10, 2023, from 11:00 AM-1:00 PM PT** at **3rd Floor Conference Room, 6101 Bollinger Canyon Rd., San Ramon, CA 94583.**

Robert Silverman, Attorney at Law will share real-life stories that will inspire you to act. He will share the underlying laws, legal and tax considerations that you need to know as you establish or review your own plan.

"We have worked with clients in estate planning and administration over 20 years and we could not stress enough importance and urgency of having an estate plan simply because we are not immortal," said Marilyn Suey, Founder of the Diamond Group Wealth Advisors and Savvy Women. "The power of proper planning certainly eases the pain and sadness when one loses a beloved."

"Estate planning is a critical part of your *Financial House*, to use one of the Diamond Group's visual aids," said Silverman. "In the work we have done with our clients, taking time to not only establish a plan but to review it on a regular basis, is key to having confidence and clarity that your hard-earned assets will serve you and your family well."

To RSVP for Savvy Women Lunch and Learn on November 10:

- Go to this link: [Events | Marilyn Suey \(diamondgroupwealthadvisors.com\)](#)
- Call 925-219-0080

Quote Lookup

TRENDING

1. Allkem-Livent merger gets regulatory approvals before shareholder vote
2. Investors expand bets on tech stocks as sector still fuels market gains -filings
3. Stock market news today: Stocks soar, yields tumble as inflation pressures ease in October
4. UPDATE 1-US SEC enforcement collected nearly \$5 bln in financial remedies last year
5. FOREX-Dollar sinks after data shows US inflation cooling

professionals, and women in transition. Using our disciplined planning system, ***Your Prosperity Blueprint Process***, we collaborate with our clients to design their personalized plans to define their path to financial independence. Our goal is to serve and support our clients so they can take care of their families, their businesses and/or careers, and the causes they care about deeply. Our core values are trust, transparency, commitment, compassion, and collaboration.

For more information visit

<http://www.diamondgroupwealthadvisors.com> or follow us on Facebook at <https://www.facebook.com/The-Diamond-Group-Wealth-Advisors-1921023328178564/> and find us on LinkedIn at <https://www.linkedin.com/in/marilyn-suey-933134>.

About: **Marilyn Suey**

Marilyn Suey is the Founder and CEO of [The Diamond Group Wealth Advisors](#) and is a nationally recognized Financial Educator, Best -Selling Author, Speaker and Wealth Manager, who you may have seen in NBC, ABC, CBS and FOX network affiliates and Yahoo News, Wall Street Journal's Market Watch, Wall Street Select and others.

She founded the [Savvy Women Community](#) where she shares her wisdom and experience with like-minded women. She received an MBA from the Wharton School at the University of Pennsylvania and a degree in Applied Math and Economics from UC Berkeley.

To schedule your complimentary Lifestyle Upgrade Assessment, call: (925) 219-0080 or email marilyn.suey@diamondgroupwealthadvisors.com.

About the Savvy Women Community

The [Savvy Women Community](#) was founded by **Marilyn Suey** in 2015 and soon after launched Lunch and Learn gatherings that ignited her passion to educate you and bring you topics that inspire, motivate, and focus on your overall well-being. Our goal is to support the advancement of your careers, enrich each other's lives and engage in the causes you care about deeply and to enable you to act on decisions that make a bigger impact on Your Work, Your Wealth and Your Worth.

About: Robert Silverman - Attorney at Law - [R. Silverman Law Group](#)

Robert Silverman, and R. Silverman Law Group is not affiliated with or endorsed by LPL Financial and The Diamond Group.

*Award based on 10 objective criteria associated with providing quality services to clients such as credentials, experience, and assets under management among other factors. Wealth managers do not pay a fee to be considered or placed on the final list of 2017, 2018, 2019, 2020, 2021, 2022, and 2023 Five Star Managers.

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Marilyn Suey is a Registered Representative with, and securities and Retirement Plan Consulting Program advisory services offered through LPL Financial, a registered investment advisor, member [FINRA/SIPC](#). Other advisory services are offered through Mariner Independent Advisor Network, LLC a Registered Investment Advisor. The Diamond Group Wealth Advisors and Mariner Independent Advisor Network, LLC are separate entities from LPL Financial. CA Insurance License #OE01981

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