



# DyMynd Solutions

*Cracking The Code on Women and Finance*



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#### Money Is Always In Style

A workshop designed to empower women to own their personal money style and better manage their financial future by taking a look at their Emotional Financial Security and shattering society-bred stereotypes.

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#### I Am My Own CFO

An engaging opportunity for women to take the driver's seat as their own Chief Financial Officer and build confidence around financial decision making as well as the appropriate financial team to support her Money Style.

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#### Money Mavens

An opportunity for parents and daughters to discuss what they want their money to create. The environment is a safe place for families to converse about finances and how approaching money wisely will have a positive impact on your future. Topics include spending, saving, investing and socially responsible investing.

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#### Smart Women Rock Money

An interactive opportunity to introduce students to key financial terms and strategies for managing money. This workshop aims to build confidence around financial decision making and allows women to embrace finance as part of their leadership and development.

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#### All Women Want Options

Options trading can help women achieve long-term financial goals by providing protection and creating additional sources of income. This course goes through the basics of options trading and helps women improve their emotional financial security as well as their investment options.

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### About DyMynd





DyMynd is an innovative financial empowerment firm that partners with individuals and organizations to help them understand the emotional relationship behind money and the key factors that drive financial decisions in life and in business. DyMynd has a suite of products, resources and workshops that provide education and insight into a woman's investment decisions. Institutions, advisors and individuals leverage DyMynd to gain a better understanding of how women feel towards their financial future, their attitudes towards investing and their behaviors around money.

🕒 According to Business Insider, by 2020, women will control \$22 trillion in investible assets. However, according to our research, finance has failed to create a loyal female customer base. DyMynd authentically engages women in a trusting relationship to address this challenge and helps women feel visible when it comes to finance and investing.

DyMynd has been most successful with two tracks. We help institutions as well as advisors attract and retain high-net worth female clients through educational workshops and seminars that provide awareness around financial decision making. We also empower individual women by enabling them to identify their personal investment beliefs, emotional financial quotient and Money Style.

If you are an individual looking to learn more about your investment options and personal relationship with money, we invite you to create your DyMynd profile by visiting:

[www.DymyndProfile.com](http://www.DymyndProfile.com)

 **Schedule A Workshop Today**

Book or ask questions about any of the DyMynd Solutions by contacting Carolyn Leonard.

 **cleondard@DyMynd.com** |  **(312) 848-3060**





## Key Takeaways

- An understanding of what money style is and how it's personal to you.
- The ability to identify and assess your money style.
- An enhanced relationship between participating advisors and clients.

👥 25 Women of All Ages | ⌚ 90-Minutes | 💰 \$5,000 \*

## Money Is Always In Style

DyMynd has developed the dynamic *Money Is Always In Style* interactive presentation through their leading research on women and their relationships with money. This is the first in a series of programs which empower women to own their personal money style and better manage their financial future.

On average, the lifetime average of a woman's earnings will be \$500,000 less than that of a man's due to today's pay gap. This makes learning how to invest and become financially savvy more important than ever.

In a casual yet sophisticated environment (with the help of beverages and light bites), DyMynd engages in a candid conversation with women about their behaviors and feelings towards money. As participants better understand the key drivers of their Emotional Financial Security (EFS), they release society-bred stereotypes and shape their own money style.

DyMynd's magnetic presentation invites your clients to embark on a journey of self-discovery that solidifies client-advisor relationships and drives next level performance. Strategic partnerships with financial institutions enables DyMynd unrestricted access to your client's goals, desires and needs. Advisors are then able to position themselves as the right partner for long-term investment and financial decisions.

The energetic 90-minute *Money is Always In Style* presentation provokes women to assess their financial identity through DyMynd's proprietary Identity Assessment while DyMynd provides benchmark information by sharing responses from leading women in Chicago.

Attendees excitedly participate in a live texting conversation and an interactive discussion stemming from DyMynd Founder Carolyn Leonard's vibrant story of how she came to own her personal money style in the pits of the Chicago Board Options Exchange.

After the powerful presentation, financial institutions receive the DyMynd presentation as a tool to help them follow up with clients and potential customers, and they are equipped with their client's identity assessment and roundtable responses to better engage them in financial planning and advising.

DyMynd's *Money Is Always In Style* workshop is estimated at \$5,000 for a group of 25 women of all ages and includes the DyMynd presentation, the DyMynd Identity Assessment and Market Analyses.

Hosting organizations provide marketing materials, a venue, light snacks and drinks. DyMynd will also co-market the event throughout their networks.



## Key Takeaways

- Women learn to recognize daily financial decisions they make.
- Participants are empowered to take “the driver’s seat” of their finances.
- Continued email education.

👥 20-30 Women of All Ages | ⌚ 90-Minutes | 💰 \$5,000 \*

## I Am My Own CFO

DyMynd’s *I Am My Own CFO* program activates a women’s own role as a financial leader. This workshop provides an opportunity to identify what is important to a person in terms of investing, how to approach long-term finances as well as how to feel empowered by one’s investment decisions. Individuals leverage DyMynd’s proven method to expand their understanding of the financial decisions they make and strengthen their emotional financial security, while institutions gain insight about investment behaviors to attract and retain female clients.

Through DyMynd’s robust research, it became apparent that early childhood experiences with money shape emotions and behaviors around investing. The *I Am My Own CFO* workshop requires women to think about and, if comfortable, share an early memory about money. Diving into their first experiences, women gain an understanding of the role money has played in their every day lives; including their feelings towards it, the transparency of it and how they approach it.

DyMynd’s research has also revealed that women see themselves as the lead financial-decision maker when it comes to big-ticket items. This workshop explores the psychology of investing from a woman’s perspective and takes into consideration how her social and family obligations guide financial decisions, current and future goals, the values women hold as well as the fear of financial loss and the behaviors that stem from fright.

Finally, the training will cover how to approach long term investing with confidence from an educational perspective. Women have the opportunity to learn about income generation, portfolio protection and how to maximize investment options for trustworthy financial decision-making. On the other hand, advisors are able to focus on what’s important to their female clients all the while strengthening their client relationships and gaining an awareness of the quantity and quality of their client’s financial decisions.

*“You can’t sell to women as though they are men wearing skirts.” - Leslie Wexner*





## Key Takeaways

- Parents share and identify their family's origin of money behaviors.
- Daughters gain an understanding of the family's money stories.
- Participants develop healthy money relationships.

👥 20 Family Participants (Parents + Daughters) | ⌚ 90-Minutes | 💰 \$5,000 \*

## Money Mavens

Designed as a dedicated resource for families, DyMynd's *Money Mavens* presentation aims to empower women with healthy money habits. This intelligent and interactive offering provides parents and daughters key insights into the role that emotions have on one's financial security, based on DyMynd's extensive research, as well as the opportunity to critically consider what drives financial engagement for both generations. The program includes a group discussion, a question & answer section as well as a live texting aspect.

Through the span of an evening, participants in this unparalleled workshop will be given the opportunity to complete the proprietary DyMynd Assessment to build their financial profile if they haven't already. Also, DyMynd will give a brief analysis of the group's results from the Assessment. To understand one's financial identity, family's partake in a conversation about how the past impacts today's decisions around money as well as internal values and what DyMynd refers to as 'care networks,' or factors taken into consideration when planning financially. The workshop then focuses on Millennials and smart money moves including; earnings, savings, giving, spending and education.

*Money Mavens* creates a safe but dynamic environment for families to have an honest discussion about investing and what they want their money to create including philanthropic efforts, 529 accounts and trusts. The workshop also provides an opportunity for participants to have an open conversation about family values around finances, the different financial outlets such as socially responsible investing and supporting companies with women on their corporate boards. Finally, participants can discuss the Return On Investment (ROI) of a College or Advanced Degree program and how these educational initiatives may impact future earnings.

DyMynd is dedicated to empowering women with the information needed to make educated decisions about their finances and the tools to develop a long-term plan to accumulate wealth. The *Money Mavens* program aims to provide families with an understanding of their role with money and for young women to gain the confidence to build a healthy relationship with it.





## Key Takeaways

- Deeper understanding of how money works.
- ROI on education.
- Small amounts invested early earns a big reward over time.

👥 20-30 Young Adults | ⌚ 120-Minutes | 💰 \$3,500 For 2 Presenters \*

## Smart Women Rock Money

Through DyMynd's leading research on women and their relationships with money, DyMynd has developed the *Smart Women Rock Money* workshop to empower young women and help them understand how to make their money work for them in today's financial environment. While providing a dynamic opportunity for women to identify and understand their monetary contributions, this workshop hones in on the desire we see from women for more financial education and builds skill sets for higher earning executives and entrepreneurs.

The *Smart Women Rock Money* workshop is best suited for a group of 20-30 young adults. This engaging program is held in collaboration with academic institutions providing female students with the opportunity to strengthen their financial leadership and development skills as well as help them make smarter decisions regarding debt, credit, borrowing and saving.

This workshop explores the roles emotion has on one's financial security, based on DyMynd's in-depth research, and drives financial engagement among young women for financial mobility and security at a younger age. The agenda encourages a group discussion and Q&A to further participant interaction.

*"It is never too early, or too late, to develop a healthy relationship with money."*

DyMynd kicks off the workshop by providing the group with an assessment enabling each student to better understand their financial identity and the factors that create their profile, their past experiences with money, the social and family responsibilities that make up their investment decisions as well as their fears that form certain financial habits.

Moving into a career discussion, DyMynd covers how to maximize earnings and investment options, saving for long-term security as well as how to spend wisely. The conversation also includes philanthropy and how giving reflects one's values in financial strategies.

Finally, the program will talk through the costs of graduate school and evaluate financial packages. Students gain a better understanding of how to manage the burden of debt, leverage a return on investment as well as the benefits of retirement savings versus paying off student loans.

The *Smart Women Rock Money* workshop drives an important conversation among young adults today and strives to introduce students to the tools they need for healthier and wealthier futures. Individuals leverage this interactive and engaging program to understand the attitudes and behaviors that shape their financial planning and how to use the learned skills in their own leadership and development initiatives.



## Key Takeaways

- Empower women to want to invest in options, where appropriate.
- Educate women on options and how they can protect assets, like insurance.
- Ability to generate income through covered call writing.

👥 20-30 Women of All Ages | ⌚ 90-Minutes | 💰 \$5,000 \*

## All Women Want Options

*All Women Want Options* is a workshop spawned from DyMynd Founder, Carolyn Leonard's personal experience with options trading and how it defined her relationship with money. As a single mother, Leonard leveraged options contracts to buy a seat at the Chicago Board Options Exchange, fund her trading account and pay her ex-husband for his half of the marital estate after the divorce. Leonard viewed her profits as accumulating assets and has since set out to help other women build their own wealth.

DyMynd partners with exchanges, educational institutions and not-for-profit organizations to bring this workshop to women looking for financial education. The program aims to enhance a consumer's self-awareness and empower women with the confidence to make smart decisions about money and investing.

Through DyMynd's leading research on high net worth women, DyMynd has determined how women view money and wealth. Women value money as a way to provide for themselves and their families, something DyMynd refers to as "their care network." Women also leverage money to improve their lives, ensure security and impact society. They want long-term stability with short-term simplicity.

The *All Women Want Options* curriculum takes a woman's "care network" and her feelings about investing into consideration. This workshop provides a guide to demystifying terminology around options trading and helps women gain a better understanding of the language and meaning behind options transactions. The education also includes applicable trading strategies that women can implement in to their portfolios, supports leading industry practices and provides direction for women to approach their financial futures.

The goal is for women to walk away from the workshop with a robust understanding of options trading strategies to help them maximize their investments, generate income and protect their portfolios. DyMynd hopes women will consider talking to their financial advisors about options contracts as well as have the confidence to engage in options trading after completing the course.

*"We can tell our values by looking at our checkbook stubs,"  
– Gloria Steinem.*

## About DyMynd

DyMynd works with financial institutions serving leading professionals and working women. DyMynd research is based on roundtables with affluent (\$100,000 or more in investible assets) and high net worth women (\$500,000 or more in investible assets).

Working side by side the DyMynd team leads through diversity as they take a sophisticated but casual approach to discussing money and investing. DyMynd creates an environment where women can safely share their past experiences with money, tap into their emotional securities and ultimately take on their financial futures with confidence.



### Meet Carolyn.

When Carolyn Leonard began trading in the pits of the Chicago Board Options Exchange using her own money, she was the only independent woman trader on the CBOE floor. She leveraged her stilettos, reading the vibration in her heels as a sign activity was heating up, and made more money than all the men around her. She is a sophisticated investor who identifies opportunities and turns them into successes. Carolyn founded DyMynd because she knows that being female is a financial advantage and she wants you to believe it too.

 **Read Carolyn's Full Story:** [www.DyMynd.com/carolyn-leonard](http://www.DyMynd.com/carolyn-leonard)



### Meet Monika.

Monika Black, PhD is a psychologist and DyMynd's Chief Strategy Officer. She led development of the DyMynd Identity and DyMynd Match assessments, the first ever to focus specifically on identifying the key drivers to focus on women's Emotional Financial Security. She is responsible for the strategic direction of the organization, development and alignment of core operations to drive product development and co-director of research. Her doctorate in Community Psychology is from DePaul University, where she is an adjunct professor.

 **Read Monika's Full Story:** [www.DyMynd.com/monika-black](http://www.DyMynd.com/monika-black)



## **Schedule A Workshop Today**

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