



Allianz Life Insurance Company of North America
Allianz Life Insurance Company of New York

DISCOVERY JOURNAL

Women, Money, and Power[®]

Financial Strategies



TO HELP YOU GET THE MOST OUT OF THIS DISCOVERY JOURNAL, during the seminar presentation there will be some optional participant activities. At any point during the presentation, feel free to make note of any insights you gain that may be useful to you. These insights could be ideas, questions, or even concerns.

At a few points in the seminar presentation, we will stop to give you time to discuss and take notes on particular topics. There is plenty of space in this journal for any notes you wish to take.

Exercise 1: How do you feel about your financial future?

Exercise 2: What did your parents or other influential adults teach you about money?

Exercise 3: What life events are you currently experiencing?

How are you feeling about it?

What challenges are you experiencing that you were not prepared for?

What life events do you foresee in the future?

Exercise 4: Which of the five financial personalities do you most closely identify with?
What qualities do you see in yourself?

Exercise 5: Write down your three most important financial goals.

1.

2.

3.

Exercise 6: Write down your three biggest financial concerns.

1.

2.

3.



TIPS FOR PREPARING TO MEET WITH YOUR FINANCIAL PROFESSIONAL

- Review the five distinct roles financially empowered women are creating today, and note which one you most closely identify with.
- Write down your three biggest concerns regarding your financial future.
- If you're caring for aging parents or anticipate you may need to someday, consider involving them.
- If you're in a relationship and share finance and investing decisions, invite your partner along.
- Finally, ask your financial professional about any factors you may have overlooked that may be relevant and important to address.



CONTACT YOUR FINANCIAL PROFESSIONAL

Consider Allianz Women, Money, and Power® financial strategies and take control of your financial future. To learn more about overcoming your financial challenges and achieving your financial goals, contact your financial professional today.

True to our promises so you can be true to yours®

As leading providers of annuities and life insurance, Allianz Life Insurance Company of North America (Allianz) and its subsidiary, Allianz Life Insurance Company of New York (Allianz Life of NY), base each decision on a philosophy of being true: **True to our strength** as an important part of a leading global financial organization. **True to our passion** for making wise investment decisions. And **true to the people we serve**, each and every day.

Through a line of innovative products and a network of trusted financial professionals, Allianz and Allianz Life of NY together help people as they seek to achieve their financial and retirement goals. Founded in 1896, Allianz, together with Allianz Life of NY, is proud to play a vital role in the success of our global parent, Allianz SE, one of the world's largest financial services companies.

While we pride ourselves on our financial strength, we're made of much more than our balance sheet. We believe in making a difference with our clients by being true to our commitments and keeping our promises. People rely on Allianz and Allianz Life of NY today and count on us for tomorrow – when they need us most.

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