



Vivian Villers, CFP®, AIF®

CERTIFIED FINANCIAL PLANNER® | ACCREDITED INVESTMENT FIDUCIARY® | AUTHOR | SPEAKER



(847) 509-4300
vjvillers@sigmarep.com
sageplanning4life.com

Vivian Villers is a compassionate speaker and seasoned financial advisor who focuses on these three areas:

1. Important steps for women to implement now to prepare for their next phase, the retirement they actually imagine.
2. Conscientious and often neglected estate planning steps to avoid leaving a mess for the heirs. Drawing from her experience, Vivian crafts compelling narratives that drive home the importance of preparation and foresight.
3. Confronting the overlooked yet crucial planning areas for families with a child with a disability.

Vivian's mission is clear: empower her audience to take control, minimize uncertainty, and strive for a secure, organized future for their businesses and loved ones. Her presentations are not just talks; they are a call to action to plan now to avoid complications.

Speaking Topics...

Money, Freedom and the Life You Actually Want

Many women don't fail to plan for retirement. They are too busy surviving life while taking care of everyone else. Retirement planning requires juggling all the pieces of Social Security, insurance and health expense, taxes, cash flow, investment management and the emotional reaction to a major life transition. The average person is too overwhelmed or uninformed to know where to start or what steps to take to create a plan for their future. In this practical presentation, Vivian shares real-world insights on managing all the pieces to help women gain the confidence to craft a flexible strategy, reach financial freedom and have the life they want for the next phase.

Don't Leave a Mess For Your Heirs

Navigating the aftermath of a loved one's passing can be complex and emotionally taxing. Vivian brings her experience and insight to this talk, highlighting how even the most thorough estate plans can leave unexpected pitfalls. She will share personal family mistakes and other stories from advising her clients for over 30 years. She will guide you through the critical, often overlooked points of estate planning to avoid leaving a burdensome mess for your family to untangle.

You Can't Wait Any Longer

Action Steps for Parents of a Child with a Disability

In this insightful and practical presentation, Vivian will address an important issue: the staggering challenges faced by parents in planning for the future of their child with a disability. With empathy and proficiency, Vivian guides the audience through a structured approach to break through the paralysis of overwhelm.

Attendees will gain an understanding of a three-phased planning process created specifically for families with a special needs child. Topics include establishing financial resources for their child without shortchanging the parents' retirement security, and critical, costly mistakes to avoid. Parents will gain confidence to move forward along the path of financially providing for a child with a disability.

Previous Speaking Appearances:

eWomenNetwork



#epicStories



Fi360



Social Media
 @VivianVillers

Vivian Villers, CFP®, AIF®
(847) 509-4300
vjvillers@sigmarep.com