



Helping Women Architects With Financial Planning Podcast

We hope you have learned much from this podcast presentation from AIA Trust and Equitable on financial planning from a woman architect's perspective. The AIA Trust is pleased to provide AIA members with the opportunity to earn 1 AIA Continuing Education System learning unit (CEU) by answering the following 10 questions based on the podcast. Write your name and member number on the completed test, scan, and email it to AIATrust@aia.org. Once we review your questionnaire, you will be emailed the correct responses to any incorrect answers and the learning credit will be added to your online transcript.

1. Which of the following is not one of the 4 steps necessary to effective financial planning?
 - a. Know
 - b. Acknowledge
 - c. Deny
 - d. Understand
 - e. Plan

2. One factor that causes women to have less earning and saving power is that women are behind men in their retirement savings goals.
 - a. True
 - b. False

3. Which is not one of the 4 money styles discussed under your relationship with money, (understanding your money mentality)?
 - a. Spender
 - b. Saver
 - c. Hoarder
 - d. Hermit
 - e. Investor

4. What factors doesn't affect how much you will need to save for retirement?
 - a. What do you want to do in retirement
 - b. What percentage of pre-retirement income do you need
 - c. Inflation
 - d. Cost of Healthcare

- e. Cost of College
 - f. Cost of Long-Term Care
5. Most investments can be divided into stocks, bonds, or cash.
- a. True
 - b. False
6. Which of the following is not a consideration for creating a plan for retirement?
- a. What does life look like in retirement
 - b. Setting priorities and goals that are not in line with your savings
 - c. Develop a plan
 - d. Put your plan in motion
 - e. Make financial decisions in line with your plan
 - f. Be open to making modifications to your plan
7. Which of the following is not a reason for maintaining a financial plan?
- a. The sooner you start to plan, the easier it will be to face your future with courage, strength, and wisdom
 - b. Small, meaningful steps matter
 - c. Small levels of savings and investing are not impactful to a long-term plan
 - d. Start saving early, or NOW if you haven't already begun
 - e. Working with professional finance guidance can increase confidence and positively impact your financial behavior
8. Help with objectively and clearly defining your expectations is a reason to work with a financial professional?
- a. True
 - b. False
9. Creating a roadmap of what you want your retirement to look like isn't an important step to building a plan on your terms?
- a. True
 - b. False
10. When talking to your children about money, which point below should not be part of their financial education?
- a. Help them quantify money
 - b. What does it mean to save
 - c. What is interest
 - d. How do credit cards work
 - e. What are the consequences of credit cards

- f. Using credit cards to build up debt you can't pay back in part of adulthood
- g. Personal credit score
- h. Running your child's credit