



A PANEL OF LOCAL FEMALE PROFESSIONALS
ADVISING PARTICIPANTS ON:

Getting Organized



Maintaining your Lifestyle,
no matter what life throws your way



Charitable Giving



Real Estate



Retirement Goals



Estate and Trust Planning

A great opportunity to ask questions, engage,
and connect with this panel of wise women!

WOODARD & COMPANY

Asset Management Group, Inc. | Registered Investment Advisors

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ALWAYS BUY QUALITY AND DIVERSIFY

Welcome to

Women 
Talk Money  Series

Empowering women to become the CFO of their lives.

The past few years left many of us apprehensive and uncertain about the economic future. We are excited to announce a new event designed by Woodard & Company to support women interested in renewing their financial focus.

Presented by

WOODARD & COMPANY





OUR PANEL OF PROFESSIONALS



Tori Boysen

Born and raised in Fort Worth, Texas but has called Winston-Salem her home for almost 30 years. Tori attended Wake Forest University and was a member of the Demon Deacons Women's Golf Team. After 22 years in the Real Estate business, Tori knows what potential buyers want and expect. Tori has a wealth of experience in every aspect of residential real estate transactions from Financing options, staging, repairs, inspections, curb appeal, closing and renting. Tori has worked with developers to open new neighborhoods and worked with builders and buyers to custom design floor plans that fit her clients specific needs. She is absolutely committed to customer satisfaction.



Crissy Dixon

Crissy is licensed to practice law in North Carolina and in the United States District Court for the Wester District of North Carolina. Her practice areas include estate planning, estate administration, taxation, and corporate law. Crissy is the past president and current member of the Estate Planning Council of Winston-Salem. Crissy is a member of the Estate Planning and Fiduciary Law Section and the Tax Section of the North Carolina Bar Association, as well as a member of the Forsyth County Women Attorney's Association, Forsyth County Bar Association and American Bar Association. She is currently a member of the Estate Administration Manual Committee of the Estate Planning and Fiduciary Law Section on the NCBA.

OUR PANEL OF PROFESSIONALS



Joan Woodard

Joan Woodard is Chief Financial Officer of Woodard & Company. She serves as a member of Woodard & Company's Investment Committee and is a Certified Public Accountant (CPA). Among her primary responsibilities is the design and implementation of 401(k), pension and profit-sharing plans as well as general counsel on tax issues. Mrs. Woodard graduated from the University of North Carolina at Chapel Hill with a Bachelor of Science in Business Administration, and is a Registered Investment Advisor.



Lisa Marshall

Lisa leads the philanthropic and alumni engagement of AHWFB and WFUSOM, the academic core of Advocate Health. Committed to bringing together support for clinical, education, and research priorities to address health needs and opportunities locally, nationally, and globally, Lisa transitioned to fundraising after 20 years in the banking industry. Recruited to North Carolina in 2011, Lisa previously led at Case Western Reserve University as Vice Dean in the School of Medicine for Development, Communications and Administration.