

PRESENTATION
FOR:

WOMEN IN MEDICINE
PRESCRIPTION FOR FINANCIAL SUCCESS

FRIDAY, APRIL 1, 2022

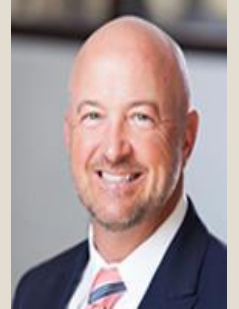
PRESENTED BY:

ELIZABETH "DITSY" KEIGHTLEY

Elizabeth D. Keightley

- With over 40 years in the investment, trust, and banking business in WV and beyond, Elizabeth “Ditsy” Keightley is currently the Wealth Management Banking Specialist for Merrill Lynch.
- Following many years as a Wealth and Financial Advisor, she formed her consulting company, EDK Consulting, LLC, to assist clients with estate and trust administration, to which she will return upon retirement in the near future.
- A native of Lewisburg, she is a graduate of Tulane University. In addition to having qualified for various securities licenses, Ditsy is a Certified Trust and Investment Advisor (CTFA) and an Accredited Asset Management Specialist (AAMS). She is a graduate of Cannon Trust Schools and the Public Finance Institute at University of Michigan Graduate School of Business.
- Ditsy is actively involved in her community, currently serving on boards of Edgewood Summit, University of Charleston, the Clay Center Collectors Club, and is the President of Kanawha Garden Club. She played an integral role in the fundraising for the CAMC Cancer Center. She is a recipient of the YWCA’s Woman of Achievement Award.

My Medical Team



Prescription for Financial Success

- **Diagnose**— assess current financial status
- **Treat** — take action to get on track
- **Monitor**- develop long-range plan



Diagnose – assess current financial status

- Where do you stand?
 - Cash Flow
 - Debt Structure
 - Risk Management
 - Investment
 - Retirement
 - Estate Planning



Treat – take action to get on track

- Pay down most expensive debt first
- Have a cash reserve – 6 months
- Mitigate family financial risk
 - Life insurance
 - Disability insurance
 - Long-term care insurance
- Invest for future and retirement
 - 401(k), 403(b), SERP, IRAs, 529s
- Estate Planning
 - Gen./Med. Power of Attorney, Wills, Trusts



Monitor – develop long-range plan

- Put on your oxygen mask first
- Find a trusted advisor



Thank you for your care of our community!
I appreciate your knowledge, expertise, and
empathy, especially during the pandemic.

