

‘Welcome to New York’ Event Series

Personal Financial Management: Panel Discussion

INTRODUCTION

- ❖ The New York Branch launched the ‘**Welcome to New York**’ event series with the objective of providing practical information to Queen’s alumni who recently moved to New York City
- ❖ ‘**An Intro to Managing Personal Finance for Canadians**’: Panel of six financial and accounting experts speaking to wealth management, personal investing, tax planning, mortgage and real estate financing options for new and established Canadians living in New York City

OBJECTIVES

- ❖ Provide a comprehensive, informative, engaging and affordable event
- ❖ Recruit a knowledgeable panel of speakers
- ❖ Facilitate connections between alumni facing similar challenges



PLANNING PARTNERS



- ❖ New York City Branch Executive Team
- ❖ Champions Committee Team
- ❖ Bank of America, Young Canadians in Finance
- ❖ Queen’s Alumni Relations partners

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ACHIEVEMENTS

- ❖ Event was of high value to alumni; both practical & educational, as well as provided an opportunity to network
- ❖ Developed key partnerships essential for a branch with limited resources



FUTURE PLANS

- ❖ Keen to continue with event series - focus on quality over quantity
- ❖ Determine topics helpful to our alumni community and develop necessary partnerships



MAKING CONNECTIONS



- ❖ Our branch is always looking for volunteers, new ideas for topics, and introductions to potential speakers and/or event partners. *Please get in touch with us!*

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GET
IN
TOUCH!

E-mail: nyc_branch@tricolour.queensu.ca

LinkedIn: [linkedin.com/groups/8615692](https://www.linkedin.com/groups/8615692)

Facebook: [facebook.com/QueensAlumniNewYork](https://www.facebook.com/QueensAlumniNewYork)

Twitter: @QueensNYAlumni

Instagram: @queensalumninyc