



Looking Forward Our Way

www.lookingforwardourway.com

@ the 511 Studios; 511 South High Street; Columbus, OH 43215

Brett Johnson brett4.johnson@gmail.com Carol Ventresca caventresca@gmail.com

GUEST CONTACT INFORMATION

Benjamin Hoeger, CFP*, Financial Advisor and Director Private Wealth Management with the Hedley Hoeger group at Baird Private Wealth Management

Podcast Title: Financial Life Planning through transitions and the impact of artificial intelligence.

bhoeger@rwbaird.com

<https://thehedleyhoegergroup.bairdwealth.com/>

<https://www.linkedin.com/in/bhoeger/>

<https://www.facebook.com/hedleyhoegergroup>

BAIRD - The Hedley Hoeger Group

4215 Worth Avenue; Suite 200; Columbus, OH 43219; 614-629-6936

The Retirement Ready Workbook by the BAIRD Hedley Hoeger Group can be found at

<https://static.fmgsuite.com/media/documents/d7f0cf10-338a-4af4-9070-2b85e515c00a.pdf>

Hedley Hoeger Group resource for resume and career coaching across all life-stages, Kolby Goodman

<https://www.kolbygoodman.com/>

FINANCIAL RESOURCES AND OTHER ORGANIZATIONS THAT CAN ASSIST YOU:

Book: *The Geometry of Wealth: How to shape a life of money and meaning* by Brian Portnoy. Available at

<https://www.amazon.com/Geometry-Wealth-Shape-Money-Meaning/dp/0857196715>

Annual Credit Report (877-322-8228) www.annualcreditreport.com

Apprisen (Consumer Credit Counseling Services) <https://www.apprisen.com>

BMI Federal Credit Union Financial Education Program <https://www.bmifcu.org/education.html>

Central Ohio Area Agency on Aging (COAAA) information and workshops on Medicare and services to seniors

<http://www.coaaa.org/>

Columbus Metropolitan Library <https://www.columbuslibrary.org/>

Consumer Financial Protection Bureau <https://www.consumerfinance.gov/>

FDIC (insures deposits in banks) <https://www.fdic.gov>

FINRA: If you are choosing a financial planner, consider utilizing FINRA [Financial Industry Regulatory Authority] to review the individuals background, U4, experience and certifications <https://www.finra.org/>

Ohio Attorney General's Office –

FAQs on Identity Theft <https://www.ohioattorneygeneral.gov/FAQ/Responding-to-Identity-Theft-FAQs>

Identity Theft Basics: <https://www.ohioattorneygeneral.gov/Files/Individuals-and-Families/Consumers/Identity-Theft/Identity-Theft-Basics>

Securities and Exchange Commission www.sec.gov

Social Security Administration www.SSA.gov

Long Term Health Care Insurance information can be found through the Ohio Department of Insurance

<https://insurance.ohio.gov/consumers/long-term-care>