FINANCIAL WISDOM
FOR WOMEN

THE DOOLIN GROUP

IT'S A PRIVILEGE

To do what we do *each day* for our clients and their families.

From day one, we’re more than financial advisors. Together, we build a plan designed to give you clarity, focus, and confidence that your wealth supports long-term growth and financial well-being—whether you’re single, married, raising a family, or leading a business.

Your well-being—and your family’s future—matter deeply to us. That commitment shows up in our proactive, get-it-done approach you can count on every day.

Our process is simple—and it works. It's built on what we would want for ourselves—clarity, discipline, and a long-term plan for success. When you follow it, you give yourself a chance to build meaningful wealth over time.

From the beginning, our focus has been on high-quality, diversified portfolios designed for the long term. We don't believe in shortcuts or chasing trends. Instead, we take a comprehensive view—looking at your entire financial picture and building a strategy that aligns with your goals.

A KEY PART OF OUR PROCESS IS TRANSPARENCY. Our reporting is designed to clearly show where you started, where you are today, and the level of risk you're taking—all in a straightforward, easy-to-understand report that gives you a complete snapshot without overwhelming detail.

WE OFTEN ASK: DO YOU WANT EXCITEMENT, OR DO YOU WANT TO BUILD WEALTH?
The two are rarely the same. Successful investing requires patience and discipline. Our clients understand that they have a role to play.

OUR INVESTMENT PHILOSOPHY IS INDEPENDENT AND UNRESTRICTED. We do not rely on in-house products or limit ourselves to a narrow set of options. Instead, we seek out high-quality investments from across the global marketplace, selecting only what we believe is best for your portfolio. This allows us to build truly customized strategies tailored to your needs.

FAIRNESS AND OPENNESS WHEN IT COMES TO COSTS. You'll always know exactly what you own and what you're paying—there are no surprises, no hidden layers, and no mystery.

FINALLY, WE STAY PROACTIVE IN OUR RELATIONSHIP WITH YOU. We schedule regular check-ins, including a dedicated review during your birthday month, to ensure your plan stays aligned with your life, goals, and dreams.

IN THE END, our process is about clarity, consistency, and trust. Follow it, stay patient, and you put yourself in a strong position to succeed.

LASTING WEALTH IS BUILT THROUGH COORDINATION

We ensure every aspect of your wealth is aligned and working together.

One of the most important decisions you'll make is choosing your financial advisor.
At The Doolin Group, we serve as more than your advisors. We also take on the role of lead advisor, communicating with your other professionals to coordinate the work they provide, designed so your plans work together seamlessly and you capture the full value of every relationship.

Think of building your team like assembling a puzzle: each professional plays a distinct role, and when the pieces fit together, they create a complete, well-aligned plan.

Wise Women Have a *Financial Plan*

STUDIES SHOW

Women are less likely to work with a financial advisor—and as a result, **THE MAJORITY OF ASSETS CONTROLLED BY WOMEN GO UNMANAGED.**

Working with a financial advisor, and having a financial plan, investors experience on average, **50 PERCENT GREATER NET WORTH GROWTH OVER TIME.**

SETTING THE GOAL IS NOT THE MAIN THING.
IT'S ABOUT HOW YOU WILL GO ABOUT IT
AND STAYING WITH THE PLAN.

Sources: McKinsey & Co, New Face of Women, May 2025, Dalbar Study, 2013–2021 & CFP Board

While no one can predict the future, you should be prepared for the possibility of managing your own finances, if you're not already. Having a clear, thoughtful financial plan isn't just helpful; it's essential.

We work with you to create your personal financial plan that you understand. Your plan considers where you are today—your net worth, cash flow, and lifestyle—alongside where you want to go. The plan builds in flexibility so you can adapt confidently as life presents new opportunities and challenges.

Wise planning gives you confidence knowing:

- Your important financial documents are in place, up to date, and easily accessible
- Your assets are positioned to support your lifetime goals
- You can maintain your independence and desired lifestyle
- Healthcare and long-term care needs have been thoughtfully addressed

Wise Financial Plans

SPAN GENERATIONS

We like to say we take wealth management one step further—and measure that step in generations.

Too often, wealth transfers lead to unintended consequences, including the loss of assets or even family unity. We believe every family should have a personal financial plan—and just as importantly, a family plan to ensure the long-term success for generations.

Once your financial plan is in place, then we add on a process to engage the entire family in generational wealth conversations to prepare for a successful wealth transfer—one that preserves not only assets but also family unity.

Our whole-family approach to wealth management goes deeper to include passing down your values, your story, and your hopes and wishes for your children and other people you hold dear.

At the heart of our work are legacy planning tools, resources, and conversation guides that bring families closer together while providing clarity around your intentions—today and for years to come.

We help ensure your wealth—and the wisdom behind it—endures across generations.

SOME OF OUR MOST FAVORITE CONVERSATIONS ARE WITH WOMEN WHO CARE DEEPLY ABOUT THEIR FINANCIAL FUTURE.

By sharing our tools, resources and guided conversations, we provide a clear path to financial leadership. We invite you—and your family—to join our events, workshops and moderated online conversations for women, offered throughout the year.

Here are a few ways to get started:

Discover what it really takes to build a personalized financial plan—it may be simpler than you think.

— Schedule a 30-minute portfolio review to assess your current investments, identify gaps, and explore opportunities for stronger results.

Request a copy of our family legacy resources:

— Wise Women Workbook: 10 Steps to Prepare for Financial Leadership

— Getting the Most from Your Professional Advisors checklist booklet

— Our collection of Generational Wealth Conversations

We also regularly speak at meetings, luncheons, and special events for professional and nonprofit organizations on topics that support financial success. When you're ready, feel free to call or email. We look forward to connecting with you.

MY COMMITMENT TO PREPARING WOMEN FOR FINANCIAL LEADERSHIP

For more than 35 years as a financial advisor, I built my practice around the kind of experience I would want for myself—one grounded in thoughtfulness, clarity, transparency, and education.

Over the past decade, I have witnessed a profound shift: more women are controlling wealth than ever before—through successful careers, entrepreneurship, inheritance, divorce settlements, and other life transitions. Increasingly, women are serving as the primary financial decision-makers for themselves and their families.

As women's wealth has grown, so too has the depth of our conversations, extending beyond investment returns and portfolio performance. Together, we explore how personal values, family priorities, well-being, philanthropy, and purpose can be thoughtfully integrated into comprehensive financial planning.

One of the most important conversations we have is about financial preparedness.

I often meet women who have entrusted financial decisions to others, only to find themselves unprepared when life circumstances change. Many successful executives and entrepreneurs dedicate so much time and energy to building their careers and leading their businesses that their personal financial planning often takes a back seat.

Those experiences inspired me to author *Wise Women Workbook: 10 Steps to Preparing for Financial Leadership*—a resource designed to help women build the knowledge, confidence, and skills needed to take a more informed role in their financial futures.

I also expanded our annual Client University to include educational programs specifically designed for women to provide a foundation of knowledge on investing, estate and tax planning, wealth transfer, and navigating life's most significant transitions.

For couples, I encourage both partners to actively participate in financial discussions and planning decisions. As families grow, I often invite families to include their children and future beneficiaries into those conversations.

Throughout my career, I have pioneered initiatives focused on strengthening long-term family success, including multigenerational advisory teams, simplified financial reporting, and family education programs—all with a particular emphasis on preparing the next generation and empowering women as financial leaders.

As co-founder of the Institute for Preparing Heirs, I have worked to raise awareness of one of the greatest challenges successful families face: preparing future generations to responsibly preserve and manage inherited wealth. Through research, education, and practical tools, our mission has helped families create stronger legacies.

What I value most is helping women and families navigate life's transitions with confidence, protect what matters most, and create lasting financial well-being. I'm especially inspired by witnessing future generations step forward as capable, confident leaders of their own financial futures.

DIANE DOOLIN.
Managing Director, Wealth Management
Financial Advisor
Email: Diane.K.Doolin@morganstanley.com
Phone: (626) 304-2411
NMLS #1290677

WISE WOMEN CHECKLIST

Check Your *Financial Leadership*

01	Are all of your **important records** organized in a central location?	☐
02	Does your spouse/partner/children (or executor) know where to **access your key records** and other information (passwords, authorizations, etc.)?	☐
03	Have you established your **team of professional advisors** (financial advisor, estate planning attorney, and tax advisor/CPA) and know what advice and services each provides?	☐
04	Do you have a **personal financial plan** that identifies your current net worth, cash flow and future goals—and have you chosen how involved you want to be in managing your investments?	☐
05	Do you have **insurance coverage** (life, disability and long-term care) that protects you and your family now and if circumstances change?	☐
06	Do you have **up-to-date estate planning documents**—will, living trust, healthcare directive and financial power of attorney—and understand what each means to you?	☐
07	Do you have **generational wealth conversations** to engage your heirs/beneficiaries in the financial and estate planning processes?	☐
08	Is it important to you to create a **legacy of gratitude and generosity** that reflects your values now and for future generations?	☐

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