

# Ally Invest Announces Inaugural Conference to Promote a Financially Secure Future

**'FOMO-Free Financial Future' is a free digital conference open to all via livestream; will feature speakers from Morningstar, iShares, and more**

CHARLOTTE, N.C., Feb. 27, 2020 /PRNewswire/ -- Ally Invest, the online brokerage and wealth management arm of Ally Financial Inc. (NYSE: ALLY), today announced its inaugural digital conference. Dubbed the *FOMO-Free Financial Future*, this fully-online event is designed to inform, educate, and empower individuals at any life stage to take control of their retirement and move toward a more secure financial future. It is free to attend and will be livestreamed on [Ally's YouTube channel](#) Wednesday, March 11, 2020.

Throughout the day, attendees who tune into the livestream will get expert takes from various index fund / ETF providers, industry-leading market research firms, and members of the *Financial Independence, Retire Early (FIRE)* movement. The speakers were selected for their ability to provide easy-to-understand, actionable information to help everyday investors move forward.

"Retirement is typically the biggest financial goal people set, but that doesn't mean it has to be the most difficult," said Lindsey Bell, Chief Investment Strategist of Ally Invest. "The goal of the FOMO-Free Financial Future conference is to do exactly what the title suggests, remove the anxiety and barriers tied to investing and retirement, and help people change the way they think about their financial future. Everyone should have the opportunity to build towards a life of financial freedom and we hope this conference will help show them how."

Lule Demmissie, President of Ally Invest, and Bell, will co-host the conference. Together with Brian Overby, Sr. Options Analyst of Ally Invest, Ally's experts will provide planning and investing insights for retirement.

For those tuning in, the digital event will begin at 9 a.m. ET on Wednesday, March 11. Registration for the FOMO-Free Financial Future digital conference is open now at [www.ally.com/fomofree](http://www.ally.com/fomofree). A full agenda is below.

## **FOMO-Free Financial Future – Agenda & Speaker Lineup**

- **9:00-9:15 a.m.** - Lule Demmissie, President at Ally Invest (*Conference Kick-off*)
- **9:15-9:45 a.m.** - Lindsey Bell, Chief Investment Strategist at Ally Invest
  - *No Excuses, Start Saving For Your Future Now:* Excuses are easy to come up with, but you will have to explain to your future self why you can't retire! For those of you who already started saving in a company 401k, congratulations. But, if you moved jobs and left that 401k behind, for instance, Lindsey will explain why that isn't the best plan for the future and how to address your situation right now.
- **10:00-10:45 a.m.** - Andy Hill, [Marriage, Kids & Money](#) Blog and Podcast / Lule Demmissie, President at Ally Invest
  - *Determining If FIRE Is for You:* In a one-on-one interview with Lule Demmissie of Ally Invest, Andy Hill will discuss how he got introduced to the Financial Independence, Retire Early (FIRE) movement, how it has impacted his life and his family, and what it means to him to be financially independent at 38. Viewers will learn how various aspects of the FIRE movement can be easily applied to their everyday lives and gain a better understanding of what it means to be "lean" FIRE versus "fat" FIRE, and so much more!
- **11:00-11:45 a.m.** - Christine Benz, Director of Personal Finance at Morningstar
  - *Six Retirement Blind Spots and How to Fix Them:* Even the best-laid retirement plans can harbor hidden risks, including longevity risk, sequence-of-return risk, and underspending. Morningstar's Christine Benz will outline how to safeguard your portfolio and your plan against these risk factors. She will also share her favorite in-retirement mutual funds and exchange-traded funds (ETFs), and discuss her model bucket portfolios geared toward retirees.
- **12:30-1:15 p.m.** - Pedro Palandrani, Research Analyst at Global X
  - *Looking Ahead with Thematic Investing:* The world is changing at a rapid pace, as new technologies like cloud computing, artificial intelligence, and autonomous vehicles promise to change how we work and live. This new technology is evolving consumer demands and quickly changing their wants and needs. In this webinar, Global X ETFs discusses thematic investing and how investors can use ETFs to apply this investment approach to their portfolios to capture some of the world's most disruptive trends.

- **1:30-2:15 p.m.** - Sarah Newcomb, PhD – Director of Behavioral Science at Morningstar
  - *Parental Martyrdom and the Myth of the Free Ride:* Why do so many people prioritize financing their children's education ahead of their own retirement? The answer has far more to do with psychology than finance. Deep values about parenting, cultural norms, and outdated/debunked beliefs about what kids need in order to be successful can all interfere with sound money management in this area. This talk will go to the core of these messages and beliefs, debunking false narratives and replacing them with sound reasoning.
- **2:30-3:15 p.m.** - Sarah Kjellberg, iShares
  - *Invest like YOU: Take a sustainable approach with ETFs:* Sustainable investing is about investing in progress and recognizing that companies solving the world's biggest challenges may be the best positioned to grow. Join Sarah Kjellberg, Head of iShares Sustainable ETFs, as she takes a deep dive into why we should consider sustainability when it comes to long term investing. Sarah will uncover the importance of environmental, social and governance (ESG) issues, and how iShares Sustainable ETFs can help investors pursue long-term performance and solve for a range of investment objectives. Learn why it's time to think sustainable first.
- **3:30-4:15 p.m.** - Brian Overby, Sr. Options Analyst at Ally Invest
  - *Option Strategies to Enhance your Retirement Portfolio:* Brian Overby, Senior Options Analyst with Ally Invest, explains common option strategies that can generate income on stocks that you currently own in your IRA and other retirement accounts. Brian will discuss in layman's terms all the steps involved with using this basic "covered call" option trading strategy to generate income above and beyond any dividends a stock may pay.

#### **About Ally Invest**

Ally Invest is the brokerage and wealth management offering from Ally that exists alongside the firm's award-winning online banking products. Ally Invest offerings consist of a low-cost trading platform for self-directed investors, as well as a suite of affordable, automatically-managed investment portfolios, both delivered through a fully-transparent online process. The combination of low-cost investing with Ally Bank's competitive deposit products gives customers a powerful value proposition for managing their financial wellbeing. Products offered by Ally Invest Securities and Ally Invest Advisors are NOT FDIC INSURED, NOT BANK GUARANTEED and MAY LOSE VALUE.

#### **About Ally Financial Inc.**

Ally Financial Inc. (NYSE: ALLY) is a leading digital financial-services company with \$180.6 billion in assets as of December 31, 2019. As a customer-centric company with passionate customer service and innovative financial solutions, we are relentlessly focused on "Doing it Right" and being a trusted financial-services provider to our consumer, commercial, and corporate customers. We are one of the largest full-service automotive-finance operations in the country and offer a wide range of financial services and insurance products to automotive dealerships and consumers. Our award-winning online bank (Ally Bank, Member FDIC and Equal Housing Lender) offers mortgage-lending services and a variety of deposit and other banking products, including savings, money-market, and checking accounts, certificates of deposit (CDs), and individual retirement accounts (IRAs). Additionally, we offer securities-brokerage and investment-advisory services through Ally Invest. Our robust corporate finance business offers capital for equity sponsors and middle-market companies.

For more information and disclosures about Ally, visit <https://www.ally.com/#disclosures>.

For further news regarding Ally, please visit the Ally press room at <http://media.ally.com>.

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