

**MRWF Luncheon Meeting, Wednesday, Feb. 20, 2019**  
**Club Restaurant at McInnis Park, 350 Smith Ranch Road, San Rafael, CA**  
**11:30 am – 1:00 pm**

**Speaker: Mary Owens, Principal, Owens Estate & Wealth Strategies Group**

**Topic: National and Local Housing Issues, Demographics are the Driving Force**

Three years ago Mary spoke to MRWF about the jobs crisis caused by lack of trades-education in our schools. Her experience in her industry and her public service as mayor of Auburn, CA give her a unique perspective on public policy issues.

Mary has more than 30 years of experience in the financial services industry, which gives her the skills and knowledge to help clients with any type of question or issue ranging from investments to insurance, taxation to real estate.

She holds Bachelor of Science Degrees cum laude in Economics and Business Administration from St. Mary's College, Moraga, CA and a Master of Science Degree in Taxation from Golden Gate University, San Francisco, CA and is a Certified Public Accountant. She also holds her California Community College lifetime teaching credential, which reflects her passion for client education.

Mary has started two companies which trade publicly today. She started an international special risk insurance company where she held the prestigious position as Chief Operations and Financial Officer. Mary also owned and oversaw the growth of a regional professional accounting firm. She also served as the Branch Manager for UBS Financial Services in Grass Valley, CA before deciding to form her own practice.

Mary offers discretionary asset management, estate and wealth planning, strategic liquidity analysis, business succession planning, comprehensive financial planning and tactical portfolio management. Mary believes that providing guidance and solutions to life's transitional issues creates stability in life's ever-changing landscape.



*Jane Maushardt, 1st VP, Programs*

**Reservations: \$30 members; \$33 non-members; Deadline: Friday, Feb. 15th**

I will attend Feb. 20th:

Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Address: \_\_\_\_\_

**Lunch Choice:**

Pot Roast with mashed potatoes/vegetables

Club Salad with Chicken

**Please mail in your payment so that check-in at the event is expedited.**

**Make check payable: MRWF**

**Mail reservations to:**

Pauline Ancell, 76 Dominican Drive, San Rafael, CA 94901

**Reservations Phone: 415-457-6934**

**Email: [Events@mrwf.org](mailto:Events@mrwf.org)**

*Notice: Advance reservations required. Lunch reservations, unless cancelled the Friday before the event, will be billed to you.*