WIP Personal Finance
Panel Discussion

June 21 • Creative Office Resources, Boston
5:30pm - 8:30pm

WHEN: Wednesday, June 21st | 5:30 PM – 8:30 PM

WHERE: Creative Office Resources
44 Thomson Place
Boston, MA 02210

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Creative Office Resources

PROGRAM DETAILS:

Please join ISPE Boston Women in Pharma for a conversation about personal finance. The event will feature expert speakers who will provide valuable insights and tips on managing your finances, investing, and planning for the future. Whether you are just starting out in your career or looking to build your wealth, this event will have something for everyone. In addition to the informative presentation, there will also be opportunities to network with other like-minded individuals and to ask questions of the speakers.

AGENDA:

5:30 PM Arrival and Networking

6:15 PM Panel Discussion and Q+A

- Panelists:
    - *Ben Hamblen*, Managing Director, Commonwealth Financial Group
    - *Bill Moody*, Financial Advisor & Planner, Commonwealth Financial Group
    - *Despoina Betaki*, Head of Accounts & Relations, Sagax Team

7:30 PM Networking and Socializing

- Includes heavy appetizers and delicious beverages!

PANELIST BIOS:

Ben Hamblen, Managing Director, Commonwealth Financial Group (CFG)

Ben Hamblen is the Managing Director of Commonwealth Financial Group (CFG). Ben joined the agency in 2014 as an Investment Specialist. Ben then transitioned into working with senior advisors on development to streamline the firm’s planning process and philosophy. After running the training program for new financial professionals for a period of time, Ben has most recently transitioned into building, managing, and growing a team of new financial professionals in the firm, who will be a core part of CFG in the years to come.

Prior to joining CFG, Ben worked in the Financial Planning Department at Baystate Financial in Boston. In this role, he acted as a Senior Case Manager for fee-based financial planners, specializing in eMoney. Ben then took a position as an Agency Supervisory Officer at MassMutual Oregon in Portland, Oregon. In this role, he was able to expand his compliance knowledge within a highly regulated industry and obtain licensing as a Registered Principal.

Bill Moody, Financial Advisor & Planner, Commonwealth Financial Group (CFG)
Bill has over 15 years of experience in the financial services industry. He began his career in 2005 as an Internal Wholesaler at John Hancock before moving to MetLife in 2010, where he worked as a Case Consultant in their Financial Planning Department. He proudly works as a financial advisor and planner with Commonwealth Financial Group since 2018. He continued his financial planning work when he made the move to MassMutual in 2016. During his time at MetLife and MassMutual, Bill was responsible for developing comprehensive financial plans for over 1,000 clients and their families.

While Bill's client base is diverse, he specializes in working with professionals in the life sciences, medical, technology, legal, and management consulting fields.

He is a CERTIFIED FINANCIAL PLANNER™ Professional, a Certified Investment Management Analyst® Professional, and a Chartered Life Underwriter® Professional. In addition, he holds a Life Insurance license, Accident & Health license, as well as FINRA Series 6, 7, 63, and 65 licenses.

Despoina Betaki, Head of Accounts & Relations, Sagax Team
Despoina is an experienced executive professional with global exposure from the UK to Germany to the US, a diverse background in biotech and pharmaceutical industries, and an additional history of working in capital markets, asset allocation, M&As, and funding. She served as the director of Global Strategies Council specializing in government relations, M&A services, business development and trade. She now heads the Accounts and Relations at Sagax Team, a boutique consulting company serving as one of the most trusted partners for Compliance and Lab Informatics in Life Sciences industry. Despoina has an Executive MBA, as well as graduate degrees in Regulatory Affairs, Pharmacoeconomics and Cybersecurity. She proudly serves the ISPE WIP Committee and is moreover actively volunteering for community projects, academic mentorship programs and activities that focus on the well-being and quality of life of fellow citizens in need.

This event is limited to 70 people and will likely sell out, so register early!

REGISTRATION FEES:
Members: $15
Non-Members: $25
Emerging Leaders Members: $15
Student Members: $15

REGISTRATION IS NOW OPEN ONLINE AT:
www.ISPEBoston.org/Events.