

Marilyn Suey, Women's Wealth Planner, Shows Why Planning for Future Care Early is a Smart, Empowered Choice

SAN RAMON, CA, UNITED STATES, April 9, 2025 /EINPresswire.com/ -- "Planning for the future is one of the most empowering things we can do—not just for ourselves, but for the people we love," says [Marilyn Suey](#), Founder and CEO at [The Diamond Group Wealth Advisors](#).

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That's the focus of the [Lunch and Learn](#) event "Beyond Today: Preparing for a Longer, Healthier Tomorrow," a complimentary luncheon hosted by The Diamond Group Wealth Advisors on Friday, April 25, 2025, from 11:00 AM to 1:00 PM at the 3rd Floor Conference Room, 6101 Bollinger Canyon Rd., San Ramon, CA 94583.

“

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says Marilyn Suey, Founder and CEO at The Diamond Group Wealth Advisors

This gathering invites you to understand the critical importance of adopting a growth mindset as we age, keeping a sense of purpose and future-care planning, all working together to support a vibrant, confident, and well-prepared life.

Planning Ahead: A Practical and Loving Choice

“Taking care of your future care needs isn't just about safeguarding your finances—it's about preserving your independence, dignity, and lifestyle as you age,” says Suey.

“When you plan, you give yourself the ability to live gracefully and, on your terms. You also ease the emotional, financial and logistical burden on your loved ones, who may otherwise be left making hard decisions for you while also taking care of their own family. Educating yourself as early as in your mid 40s is a smart choice as it gives you time to reflect and allocate resources,” Suey adds. “Planning during this window allows you to take action while you're still healthy and have more options available.”

A Tale of Two Paths: The Impact of Preparation

Ruth, 76 – Former High School Principal

Ruth was a respected educator who spent over 30 years building a meaningful career. In her late 50s, she worked with a wealth planner to build a long-term care plan that matched her lifestyle goals. At age 74, when she experienced a stroke, her plan allowed her to receive her preferred in-home care, while her adult children focused on supporting her emotionally rather than scrambling to manage her care.



The poster for 'The Diamond Group Wealth Advisors Lunch and Learn' features a warm, yellow background with a large, leafy tree on the right. Four stylized, colorful cartoon figures of older adults (two women and two men) are standing under the tree, holding hands. The text on the left side of the poster reads: 'TheDiamondGroup WEALTH ADVISORS PRESENTS Lunch and Learn Conversations That Make A Difference Beyond Today Preparing for a Longer, Healthier Tomorrow – The Smart Approach to Future-Care Ready Planning'. Below this, it says 'You are cordially invited to a complimentary luncheon on longevity and wellbeing' and provides the event details: '11:00 am - 1:00 pm Friday, April 25, 2025 3rd Floor Conference Room, 6101 Bollinger Canyon Rd., San Ramon, CA 94583'. At the bottom right, it says 'Seats limited. Register today! Scan the QR code or call 925-219-0080.' and includes a QR code.

The Diamond Group Wealth Advisors Lunch and Learn

Corin, 78 – Interior Designer and Business Owner

Corin ran a successful design firm for decades and was always “too busy” to take time to plan for her future care. When Parkinson’s symptoms began at 76, she and her family had no roadmap. Her daughter eventually reduced her work hours to become Corin’s part-time caregiver. This not only impacted on Corin’s retirement plans, but also her daughter’s earning capacity.

“These are the kinds of stories I hear all the time,” says Marilyn, “Both of them were strong, successful, and loved by their families. It is when life’s curveballs hit, the difference in their daily lives now comes down to preparation. In Corin’s case, it would have been a much different scenario if proper action were taken earlier than later.”

Learn More! Join us for Lunch and Learn – Conversations That Make A Difference

Lunch and Learn – Beyond Today offers a thoughtful, encouraging space to learn about:

- Why mindset matters for a longer health span, especially for women
- Why Future-care planning is critical for women
- Key tips to age gracefully and take control of your worth and well being.

“This isn’t about selling anything—it’s about having impactful conversations, surrounded by like-minded individuals who take action,” Suey adds. “We want to educate you and to feel empowered to plan ahead, live fully, and age with confidence and grace.”

Event Details

Event: Beyond Today: Preparing for a Longer, Healthier Tomorrow

Date: April 25, 2025

Time: 11:00 AM – 1:00 PM

Location: 3rd floor Conference Room, 6101 Bollinger Canyon Rd., San Ramon, CA 94583. Cost: Complimentary (includes lunch)

RSVP: Seats are limited. Save your spot [here](#).

About Diamond Group Wealth Advisors

The Diamond Group Wealth Advisors is an independent wealth management firm based in San Ramon, CA., providing integrated financial planning and investment management services for individuals, business owners, healthcare professionals, and independent women.

Marilyn Suey and her team at The Diamond Group Wealth Advisors are driven by the company's core values — trust, transparency, commitment, and compassion — to serve, support, and collaborate with you to understand your ambitions, your vision and the legacy you want to leave behind.

“Our clients know that true wealth isn't just about numbers — it's about purpose. That's why we design every plan to reflect what truly drives you at every stage of your life,” she said.

Marilyn Suey

The Diamond Group Wealth Advisors

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