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## The Discerning Investor

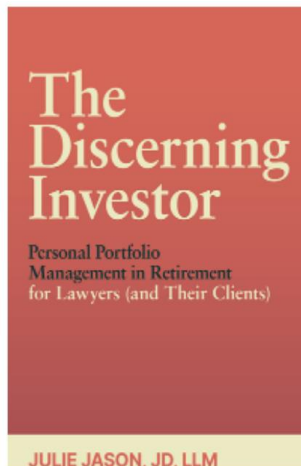
*Personal Portfolio Management in Retirement  
for Lawyers (and Their Clients)*

Julie Jason is available for:  
Interviews  
Byline/guest articles  
Speeches and CLE  
Meetings with Law Firm Management Committees

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### Attorney Coach Shares an Important Message About Preparing for a Successful Retirement

Stephen Seckler, President of Seckler Attorney Coaching, shares insights on how to think about retirement in the foreword to the new American Bar Association publication, *“The Discerning Investor: Personal Portfolio Management in Retirement for Lawyers (and Their Clients).”*



Stamford, CT, July 21, 2022—Retirement today is very different than it was 50 years ago. People are living longer, and lawyers, like many other knowledge workers, have the ability to work well into their 60s and 70s and beyond. Supreme Court Justice Ruth Bader Ginsburg was productive well into her late 80s.

But for many lawyers, continuing to work is a default option rather than something that has been carefully planned out. Part of the reason is that lawyers have very strong professional identities. Part of the reason is finances.

As high-income earners, many lawyers fear that they won't have enough money to last them throughout retirement. That fear needs to be addressed before decisions can be made.

From my perspective as a career coach, I see lawyers creating meaningful and productive *“third chapters”* of their lives. A crucial part of this is to look at finances, a challenging topic well laid out by Julie Jason, JD, LLM, in *“The Discerning Investor: Personal Portfolio Management in Retirement For Lawyers (and Their Clients).”*

Given how long many Americans are now living, taking the time to prepare to finance your possibly lengthy retirement is essential in making a successful career transition. Finances should really be the first step in *any* transition planning.

To help you in your journey, Julie has created a great starting point. In this book, she walks you through the key concepts and considerations needed to create a viable financial program for your retirement, whatever that retirement looks like.

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*The Discerning Investor* prepares you to avoid miscues and take advantage of opportunities to ensure that the wealth you created during your career will now work for you in your third chapter based on your personal preferences.

Planning your future has many dimensions. Maybe you will become a mentor to younger lawyers at your firm or spend more time doing pro bono work. Perhaps you will get active on nonprofit boards. Maybe you will decide to pick up the guitar that you really enjoyed playing as a teenager and a young adult (the instrument that has been sitting in your attic for 30 years). Perhaps you will spend more time traveling, studying religion, or writing the screenplay that has been in your head for several decades.

If you are healthy, it can be an exciting time of life. Figuring out how you will make it all work financially is an important first step.

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Stephen E. Seckler, Esq. ([stephen.seckler@counselftocounsel.com](mailto:stephen.seckler@counselftocounsel.com)) is President of Seckler Attorney Coaching. As “Counsel to Counsel,” over the last three decades, he has coached hundreds of attorneys through career transitions and helped hundreds of lawyers to grow their income. [Counsel to Counsel](#) is his website and podcast. His program, [The Next Stage](#), is for senior attorneys thinking about “What Comes Next.”

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The book is available exclusively through the ABA: <https://www.americanbar.org/products/inv/book/422017878/>. For a limited-time discount code, go to <https://jacksongrant.us/next-steps/the-discerning-investor> where you can also hear Julie Jason, the author, discuss the book. Discounts are available for books ordered in bulk. Special consideration is given to law firms, state bars, CLE programs, and other bar-related organizations. Inquire with the ABA Service Center at (800) 285-2221 or [orders@americanbar.org](mailto:orders@americanbar.org)

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The trusted voice of retirement investing, **Julie Jason**.

Visit her at [www.jacksongrant.us](http://www.jacksongrant.us) and follow her:   

### **The Discerning Investor**

By Julie Jason, JD, LL.M.

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## ABOUT THE AUTHOR

Julie Jason, JD, LLM, developed her views on financial services over a lifelong career in law and management, starting out on Wall Street as a lawyer. Thirty years ago, she founded her own investment counsel firm—Jackson, Grant, Investment Advisers, Inc. of Stamford, CT, a fiduciary boutique—where her team manages personal portfolios for high-net-worth families.



To hear Julie speak about Jackson, Grant, go to [www.jacksongrant.us](http://www.jacksongrant.us) (A Message From Our Founder).

Through her award-winning weekly investor education column (syndicated by Andrews McMeel Syndication), Julie troubleshoots financial problems for a broad audience of readers of every financial means. Her award-winning books and columns have been recognized for excellence in financial literacy education and accuracy in reporting. [www.juliejason.com](http://www.juliejason.com)

If you represent a law firm or corporate law department, Julie is happy to speak with your management committee about the content of *The Discerning Investor*, for professional development. Contact Angela Gagliardo at [angela@juliejason.com](mailto:angela@juliejason.com) (203.322.1198) for more information.

Hear Julie talk about *The Discerning Investor* at <https://jacksongrant.us/next-steps/the-discerning-investor>

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