

Financial Educator Marilyn Suey Expands Global Reach for Women's Wealth, Financial Education, and Longevity Planning

Savvy Women Founder Helps Women Navigate Retirement Planning, Financial Literacy, and Healthy Aging with Speech at International Women's Retreat in Bermuda

SAN RAMON, CA, UNITED STATES, May 15, 2026 /EINPresswire.com/ -- As women continue to live longer and increasingly become primary financial decision makers within their households, conversations around women's wealth management, retirement planning, healthy aging, and financial literacy are becoming more important than ever.

“

Marilyn brings clarity to conversations many women delay.”

Sharon Burstein

That message resonated strongly when financial educator, women's wealth advocate, and retirement planning specialist [Marilyn Suey](#) recently traveled to Bermuda as a featured speaker at the YOUNiqueLY YOU Women's Retreat hosted by empowerment leader Sharon Burstein at Willowbank Resort from April 23 to 26, 2026.

Known for helping women gain greater clarity and confidence around financial planning, wealth management, and longevity preparation, Suey used the international retreat as another avenue to educate and empower more women globally.

The retreat brought together women from around the world for several days of personal growth, leadership development, wellness education, and meaningful connection. Suey's presentation focused on helping women better understand the connection between financial wellness, healthcare planning, retirement income, healthy aging, and long-term quality of life.

“Women are living longer, working longer, caregiving longer, and managing more financial



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responsibility than ever before,” Suey says. “Many women were never taught how retirement planning, healthcare costs, investing, and longevity all work together. Education creates confidence and gives women more options later in life.”

Through her work with the [Savvy Women Community](#) and [The Diamond Group Wealth Advisors](#), Suey has spent years educating women on topics including:

- Women’s wealth management
- Financial literacy for women
- Retirement healthcare planning
- Retirement income strategies
- Long-term care planning
- Legacy and estate planning
- Financial planning for women over 50
- Longevity planning and healthy aging
- Retirement transitions and financial confidence

During the Bermuda retreat, Suey introduced what she calls the intersection of three critical areas women must align as they age:

- Life Span — how long we live
- Wealth Span — how long our financial resources last
- Health Span — how long we remain active, healthy, and independent

“When these areas are not aligned, pressure may build,” Suey explains. “You can have retirement savings but no healthcare strategy. Or good health but uncertainty around income later in life. Women deserve to understand how all these moving pieces work together so they can make informed decisions earlier and more confidently.”

Her message particularly resonated with women navigating career transitions, caregiving responsibilities, widowhood, retirement preparation, healthcare decisions, and major life transitions.

A Natural Partnership with Sharon Burstein

Host Sharon Burstein created the YOUniquely YOU experience to help women step into ownership of their lives with intention and courage. Adding financial longevity education to that environment enhances the retreat’s mission.



Marilyn Suey, center, helps women gain greater clarity and confidence around financial planning, wealth management, and longevity preparation.

“Marilyn brings clarity to conversations many women delay,” Burstein says. “This retreat is about taking ownership of your finances and thoughtfully designing a life that remains vibrant, independent, and deeply meaningful across the decades.”

Together, the programming blends mindset work, emotional resilience, strategic thinking, and actionable planning.

As demand grows for women centered financial education and retirement guidance, Suey continues speaking nationally and internationally on topics related to women’s wealth, financial confidence, healthy aging, and longevity.

Her educational approach combines practical financial literacy with real life conversations women face every day including caregiving for parents or children in need, career transitions (or what she calls - 2nd act), healthcare planning, investing, and maintaining independence later in life.

“Financial literacy is not just about money and most definitely not just for a certain stage in life,” Suey says. “It is about understanding your options, building confidence, staying independent, and the ability to live life on your own terms.”

About Marilyn Suey | Founder and CEO, The Diamond Group Wealth Advisors

Marilyn Suey is more than a wealth advisor. She is a compassionate guide for those navigating some of life’s most important financial decisions and personal transitions.

As Founder and CEO of The Diamond Group Wealth Advisors, Marilyn has spent over two decades helping women, families, business owners, healthcare professionals, and executives build greater clarity, confidence, and control over their financial future.

What sets Marilyn apart is not only her knowledge, but her passion. Over the years, she noticed a common pattern among many accomplished women she met. Despite successful careers and years spent caring for others, many quietly admitted they felt uncertain about their finances, retirement, investing, or the next stage of life. Some were navigating divorce or widowhood. Others were balancing careers, caregiving responsibilities, and major life transitions. What they were often searching for was not simply financial advice, but someone who would truly listen and help them move forward with confidence.

Marilyn did.

Before founding her firm, Marilyn spent more than 30 years in leadership roles within the

technology sector, including startups, venture capital-backed companies, and organizations that later went public or were acquired. Her experience working alongside innovators, entrepreneurs and executives gave her a unique perspective on resilience, reinvention, leadership, and long-term wealth creation.

Those experiences shaped her belief that financial planning is never just about money. It is about your independence, intentions, purpose, and the ability to make choices with confidence.

Today, Marilyn works closely with women navigating pivotal life moments including retirement, career transitions, caregiving responsibilities, loss of a spouse, divorce, business ownership, and planning for longevity. Her approach blends technical excellence with empathy, helping women organize what feels overwhelming, understand what feels uncertain, and create practical strategies aligned with the life they want to live.

Marilyn is also the founder of the Savvy Women Community, an educational platform designed to help women take control of their work, wealth, worth, and well-being through financial education, connection, and meaningful conversations. She is the author of 36 Quick Tips for Savvy Women, reflecting her commitment to helping women take ownership of their future with greater competence and confidence.

Known for her warm and conversational speaking style, Marilyn regularly speaks nationally and internationally on topics including women's wealth, longevity planning, retirement transitions, financial literacy, healthy aging, and creating alignment between Life Span, Wealth Span, and Health Span.

Marilyn is a life-long learner; She is a graduate of UC Berkeley with a degree in Applied Math and Economics and has an MBA from the Wharton School at University of Pennsylvania. In addition to being a CERTIFIED FINANCIAL PLANNER® professional, she has also earned the Accredited Investment Fiduciary®, Certified Exit Planning Advisor and Certified Plan Fiduciary Advisor® designations. She resides in Danville, California with her family.

Above all, Marilyn believes every woman deserves to feel seen, heard, supported, and financially confident no matter what season of life she's navigating.

She has authored numerous books including "Retire Abundantly" and "36 Quick Tips for Savvy Women." Marilyn is a featured guest contributor to the wealth-building book by Kevin Harrington, Build Wealth Like A Shark which became a number one bestseller on Amazon in four categories and in three countries. As well as The Serving Leader with 5 Powerful Actions that will Transform Your Team, Your Business and Your Community.

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