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# New Trump Accounts Explained in Free Seminar Led by Marilyn Suey, CEO of The Diamond Group Wealth Advisors

*Parents and grandparents will learn eligibility requirements, tax rules, government contributions and how the new accounts compare with other savings strategies*


SAN RAMON, CA, UNITED STATES, July 17, 2026 /EINPresswire.com/ -- The recently enacted Trump Accounts, a new savings opportunity, is creating new opportunities and new questions for parents and grandparents seeking tax-advantaged ways to save for children. To help families understand how the new program works, a free educational seminar will be held on July 24 by Marilyn Suey, CEO of The Diamond Group Wealth Advisors. She is a CERTIFIED FINANCIAL PLANNER® and has advised families and business owners on financial planning and retirement strategies for more than four decades.

“Trump Accounts Explained: What Every Parent and Grandparent Should Know” will be held on Friday, July 24, 2026, at Noon Pacific Time. Register online at Ask Marilyn on Trump Accounts or call 925-219-0080.

Trump Accounts were created under recently enacted Federal legislation designed to encourage long-term investing for children. Eligible children may receive an initial government contribution, with additional contributions permitted from family members and employers under specific IRS rules.

“Many families have heard about Trump Accounts but aren't sure whether they’re eligible or whether these accounts make sense compared with other savings options. This seminar is designed to give people objective information so they can make informed decisions. Every family's financial situation is different, and understanding the rules before opening an account can prevent costly mistakes,” said Ms. Suey.

“These new accounts are generating plenty of discussion and just as many questions,” she said.

For example:

- Which children receive the $1,000?

- How does this compare to a 529 plan or other investment accounts for children?

- Are there income limits?

- What investments are allowed?

- When can money be withdrawn?

- Can grandparents contribute?

“Whether you’re a parent, grandparent, or simply planning ahead for future generations, you’ll leave with greater clarity about this new investment option,” she said.

Before opening an account, it is important to understand:

- Who qualifies and what are the steps to open one

- Tax rules and withdrawal considerations

- The opportunities and rules

- When a different strategy may be more appropriate

The seminar will also compare Trump Accounts with 529 college savings plans, custodial accounts and other strategies.

Participants will also have the opportunity to ask questions and discuss real-life concerns in a supportive, educational environment.

Marilyn will be joined by Patrick DeMeo, CFP ®, CIMA ®, CSRIC ®, sales executive in Vanguard Financial Advisor Services ™ to provide perspective and insights on this topic.

About The Diamond Group Wealth Advisors

The Diamond Group Wealth Advisors is an independent wealth services firm that empowers its clients to design their ideal lifestyle, starting today, for tomorrow, and for life. Serving and supporting individuals, business owners, healthcare professionals and independent women navigating life's many transitions.

In designing the rooms in Your Financial House, we start with understanding your goals,

your dreams, your intentions, and the causes you care about deeply. Guided by our core values of trust, commitment and compassion, we meet you where you are to provide personalized guidance every step of the way.

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

Marilyn Suey, CFP®, MBA, is Founder and CEO of The Diamond Group Wealth Advisors in Danville, California. She is a graduate of UC Berkeley with a degree in Applied Math and Economics and has an MBA from the Wharton School at the University of Pennsylvania, with 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. Marilyn is the founder of the Savvy Women Community, author of Retire Abundantly and 36 Quick Tips for Savvy Women.

What sets Marilyn apart is her specialized guidance for women in transition. Over the years, she noticed a common pattern among many accomplished people 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.

Her experience working alongside innovators, entrepreneurs, and executives gave her a robust perspective on transformation, 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, many of whom are physicians and dentists, 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 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.

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.

MEMBERSHIPS AND AFFILIATIONS

-Member, Financial Planning Association and Northern California Planned Giving Council

-Board Member, Senior Services Northern California Foundation, affiliated with Northern California Presbyterian Homes and Services

-Board Member, Sequioa Living and Services

-President, Blackhawk Country Club, Danville, CA, 2024 and 2025.

DISCLOSURE:
Patrick De Meo and Vanguard are not affiliated with or endorsed by LPL Financial and The Diamond Group Wealth Advisors.

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