

FIRESIDE CHAT: Monday, 3/3 at 11:45 AM

Beyond the Annual Check-up: Understanding Drivers of Mental and Financial Health



Lillies Lanway
SVP, Head of US Deal Originations,
FrontWell Capital Partners



Simone Vinocour
Financial Advisor &
Financial Planning Specialist
Morgan Stanley



Dr. Roma Palcan
Licensed Psychologist,
Private Practice

Now is the Time: Launching TMA Florida's Network of Women (TMA NOW)

Join us for "Beyond the Annual Check-up: Understanding Drivers of Mental and Financial Health," a compelling discussion led by moderator Lillies Lanway. This conversation will feature Dr. Roma Palcan, PhD, who will highlight the impact of psychological health on overall well-being, and Simone Vinocour, a Financial Advisor at Morgan Stanley, who will provide actionable tools for achieving financial security.

Together, they will explore key themes such as building resilience, holistic wellness, and life stage planning, offering insights on how mental clarity and financial stability contribute to personal and professional success. Attendees will walk away with practical strategies for achieving peace of mind and long-term financial confidence. Don't miss this opportunity to gain expert guidance on fostering a balanced, secure future!

PANEL:

Lillies Lanway - SVP, Head of US Deal Originations, FrontWell Capital Partners

- Lillies Lanway serves as the Senior Vice President and Head of U.S. Deal Originations at FrontWell Capital Partners. Before joining FrontWell, she dedicated 21 years to Accord Financial, Inc., culminating in her role as Senior Vice President of Business Development, where she led the U.S. Asset-Based Finance business development team. From 1992 to 2000, Ms. Lanway operated as an independent broker in the factoring industry. She currently presides as the Florida chapter president of the Turnaround Management Association. Her educational background includes studies in Indonesia and Singapore, and she earned a Bachelor of Arts degree in Business Administration from the University of Nebraska.

Simone Vinocour - Financial Advisor & Financial Planning Specialist Morgan Stanley

- Highly regarded for her product and markets knowledge and demonstrated ability to build long-term relationships with clients, Simone Vinocour is a Financial Advisor, Financial Planning Specialist and Insurance Planning Director at Morgan Stanley, having joined Firm in 2018 and the Anne Izzillo Group at Morgan Stanley in 2022.

With over 20 years of progressive experience in helping multinational Fortune 500 corporate clients in the consumer products and retail, as well as pharmaceutical and medical device industries achieve their financial goals, she is using these same skills to provide wealth management services and solutions to individuals and families, non-profits, corporate executives and business owners to help them achieve their own financial goals. Known for her distinctive ability to develop strategic long-term relationships, she excels in aligning clients' needs with the firm's product offer and research insight to bring solutions.

Simone is passionate about virtually all aspects of wealth management and has a proactive approach in assisting clients in the management of their financial lives so they may have greater capacity to pursue their own professional and personal pursuits. Simone understands the challenges that many of her clients face throughout their lives and the importance of having an advisor to navigate "milestone" financial events such as planning for college, managing executive compensation and retirement planning. Life can often throw a curveball, but a comprehensive financial plan can help to mitigate these financial challenges.

As a recognized leader in diversity and inclusion initiatives, she also is ardent about empowering women in the financial services community and beyond to have the necessary skills for financial and professional success. Simone has been involved actively in the Financial Women's Association (FWA) of New York since 2002 and is currently the Co-Chair of its

Strategic Advisory Council of corporate sponsors, having served FWA President and Board Chair from 2019 – July 2021. She is active in internal diversity and inclusion initiatives within Morgan Stanley, and serves as a mentor to rising talent in the industry.

Simone's extensive global experience gives her insight into how global markets impact investors. Simone obtained her MBA in Finance and International Management at New York University, Leonard N. Stern School of Business, and her B.S. in Business Administration at Georgetown University where she studied marketing and German. She additionally studied at Erasmus University, Rotterdam School of Management, completing the International Management Program. She continued to live and work in banking in the Netherlands for six years. Simone holds Series 7, 63, 66 and 79 certifications and is a licensed insurance broker for life, variable, and accident & health insurance, as well as long term care. With varying language proficiencies in Dutch, German and French, she is adept in building relationships worldwide across all cultures.

Simone presently resides in New York City, where in her free time she enjoys travel, jazz, and ballet with her husband and two children. Simone also is on the Ministry Council of St. Ignatius Loyola parish in Manhattan and serves as the parish's Chair of its Interfaith Ministry. On Sunday mornings, you can find her there singing in the Wallace Hall Choir.

Dr. Roma Palcan - Licensed Psychologist, Private Practice

- Roma Palcan is a licensed psychologist who has served the Tampa Bay community for 29 years, the past 17 of which have been within the U.S. Department of Veterans Affairs (VA) healthcare system. She earned her Ph.D. in Counseling Psychology from the State University of New York at Buffalo and began her career in private practice. Throughout her extensive career, she has worked with individuals across all ages and backgrounds—providing care for individuals, couples, families, small groups, and larger audiences.

Her diverse practice settings range from hospital bedside care, nursing homes, courtrooms, schools, and prisons to her current role providing psychological services in a residential rehabilitation program for unhoused and unemployed veterans. She has also shared her expertise through radio and public speaking engagements, furthering her mission of accessible mental health care.

In one year, Dr. Palcan plans to retire after 30 years of full-time practice, returning to her passion for individual, couples, and family therapy as a master psychotherapist and educator. Outside of her professional life, she enjoys an active lifestyle in St. Petersburg, spending time with her four adult children, traveling, biking, reading, cooking, gardening, and even building tiny houses.