

You AND YOUR GUEST(S) ARE INVITED TO

The 11th Annual Cleveland Economic Summit

Wednesday, June 12, 2019 | Time: 4:00 to 6:30 pm

Gain perspective on today's most relevant economic and political issues

We look forward to welcoming you and your guests to one of Northeast Ohio's most insightful and informative events. The Annual Cleveland Economic Summit provides local investors and members of the business community with an opportunity to gain perspective on today's most relevant economic and political issues from leading experts on the financial, economic and political landscape. Join us to learn what you should be thinking about now as an Ohio investor, taxpayer, or business owner.

- Arrive early to enjoy meeting new people and networking with local business leaders, our speakers and host at our cocktail reception.
- Stay afterwards to enjoy a private stroll through Cleveland's spectacular Botanical Gardens until 9pm.

PROGRAM

Our complimentary late afternoon event hosted by Frank Fantozzi, President and Founder of Planned Financial Services, will feature two distinguished speakers: John Lynch, Executive Vice President and Chief Investment Strategist at LPL Financial and Joe Marinucci, President and CEO of Downtown Cleveland Alliance.

- Mr. Lynch will share his mid-year outlook for the economy, financial markets, business climate and political landscape, discussing key factors and developments that may impact your business, tax strategies and investment decisions in the coming months.
- Mr. Marinucci will provide insight on the local Cleveland economy, including real estate development, the city's future growth initiatives, and what he believes Cleveland must do to remain a relevant, competitive and vibrant force among the nation's top cities.

SPEAKERS



John Lynch

Executive Vice President

Chief Investment Strategist, Research



As Executive Vice President and Chief Investment Strategist, John Lynch leads the market and economic analysis for LPL's Research team and is responsible for the firm's strategic and tactical investment advice. Mr. Lynch joined LPL in 2017 with more than 30 years' experience in the financial services industry. Previously, he held roles that included Senior Vice President and Chief Investment Officer for the Mid-Atlantic region of Wells Fargo Private Bank, Chief Equity Strategist with Wells Fargo Asset Management, and Chief Market Analyst for Wachovia and Evergreen Investments. Earlier in his career, he honed his investment skills while working in New York in the securities industry, focusing on equity strategy and portfolio management.



Joseph A. Marinucci

President and CEO

Downtown Cleveland Alliance



Joe Marinucci is President and CEO of Downtown Cleveland Alliance (DCA), the largest Special Improvement District in the State of Ohio. DCA is dedicated to improving the pedestrian experience for people who work, live and play in Downtown Cleveland and to attracting additional private investment to the Central Business District. Prior to joining DCA, he served as President and Executive Vice President of DCA's predecessor organization, Downtown Cleveland Partnership; Vice President of Real Estate Development for Cleveland's Playhouse Square, the country's second largest theater district; Director of Economic Development for the City of Cleveland; and Deputy Director for the Ohio Department of Development.

HOST



Frank Fantozzi

President and Founder
Planned Financial Services

Frank Fantozzi is pleased to host a select group of clients, esteemed individuals, and business owners at *The 11th Annual Cleveland Economic Summit*. For 25 years, Frank has led a growing Cleveland-based independent Registered Investment Advisory (RIA) firm that embraces a team-based approach to delivering timely, actionable, and relevant advice, coupled with comprehensive planning and financial education. Born and raised in Cleveland, he is passionate about serving as a catalyst for change in our local communities and in the lives of his clients as they pursue their desired **Return on Life**®. Learn more about Mr. Fantozzi and the Planned Financial Services team at www.PlannedFinancial.com/your-team.



Hosted by



AGENDA

WEDNESDAY, JUNE 12, 2019

4:00 pm - 4:45 pm

Registration/Networking/Cocktail Reception

4:45 pm - 5:00 pm

Welcome - Frank Fantozzi

5:00 pm - 5:45 pm

Mid-year Economic & Financial Market Outlook
Q&A - John Lynch

5:45 pm - 6:30 pm

Cleveland Growth & Development
Q&A - Joe Marinucci

6:30 pm - 9:00 pm

Optional at your leisure, complimentary access to the Cleveland Botanical Gardens

RSVP

PLEASE RSVP FOR YOU AND YOUR GUEST(S) BY JUNE 5TH, 2019

Complimentary Parking at onsite parking garage
(Validate parking ticket with attendant upon arrival).

The Garden will remain open until 9:00 pm following the Economic Summit. Stroll through, experience, and become inspired by all it has to offer!

Please RSVP to reserve seats or a corporate table to Michelle Velotta at 440.740.0130 ext. 221 or Michelle@PlannedFinancial.com.

Space is limited.

VENUE

Our complimentary program will begin with a networking and cocktail reception featuring heavy hors d'oeuvres at the world renowned:



CLEVELAND botanical garden

HOLDEN FORESTS & GARDENS

Cleveland Botanical Garden - Woodland Hall

11030 East Boulevard,
Cleveland, OH 44106
www.cb garden.org

To learn more about Planned Financial Services, visit www.PlannedFinancial.com

John Lynch, LPL Financial; Joe Marinucci, Downtown Cleveland Alliance; and Planned Financial Services are all separate, unaffiliated entities.

Investment advice offered through Planned Financial Services, a Registered Investment Advisor.

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#ClevelandEconomicSummit

