

You and Your Guests are Invited to Join Us for:

# The 9th Annual Cleveland Economic Summit

Wednesday, May 24, 2017 • 4:00 pm to 6:30 pm

JOIN THE CONVERSATION  
#CLEVELANDECONOMICSUMMIT



Your Life. Your Money. Your Way.®

[www.PlannedFinancial.com](http://www.PlannedFinancial.com)



## PROGRAM

Bring a guest(s) and join us for this entertaining and informative late afternoon event featuring two distinguished speakers: **Emily R. Roland, CIMA®**, Head of Investment Research at John Hancock Investments and **Eric Embacher**, Visitor Experience Program Manager at Destination Cleveland. Our featured speakers will join your host, **Frank Fantozzi**, in providing investors, business leaders, and taxpayers with keen insight on how the new White House administration is reshaping the financial, political, economic, and tax landscapes, and how unprecedented new development is driving tourism and business growth throughout the Greater Cleveland area.

**Gain in-depth analysis and perspective on the key factors that will impact your business, tax strategies and investment decisions in the coming year.** Ms. Roland will discuss the potential impact Trump administration tax and trade policies may have on the U.S. and its trading partners; domestic and global financial markets; and Ohio residents, businesses, and workers.

**Discover what's behind Cleveland's dynamic growth.** Mr. Embacher will present Destination Cleveland's latest findings on the impact of leisure and business travel in stimulating community vitality for Greater Cleveland, including job creation, direct and indirect sales, and tax revenues. Join us to learn about the vital role tourism plays in shaping our local economy and get the inside scoop on new destination developments.

## AGENDA

- 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 and Q&A - Emily Roland**
- 5:45 pm - 6:30 pm - **Cleveland's Dynamic Growth and Q&A - Eric Embacher**

## VENUE

Our late afternoon program will begin with a networking and cocktail reception featuring heavy hors d'oeuvres at one of Northeast Ohio's most coveted treasures, the world renowned:



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!



**Cleveland Botanical Garden - Woodland Hall**  
11030 East Boulevard • Cleveland, Ohio 44106  
[www.cb garden.org](http://www.cb garden.org)

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

## SPEAKERS & HOST



**Emily R. Roland, CIMA®**  
*Head of Investment Research  
John Hancock Investments*

Ms. Roland leads the investment research function for John Hancock Investments where she and her team are responsible for leveraging capital markets and industry research to help set the firm's business strategy. Ms. Roland joined the company's investments division in

2004 after holding positions in product management, marketing, and competitive intelligence over the previous 10 years. Prior to joining John Hancock, she held roles at GMO and the Boston Stock Exchange. She is a Certified Investment Management Analyst designee and holds an MBA from Boston College.



**Eric Embacher**  
*Visitor Experience Program Manager  
Destination Cleveland*

Mr. Embacher is the Visitor Experience Program Manager under the Destination Development and Community Affairs department at Destination Cleveland, the region's convention and visitor's bureau. Mr. Embacher facilitates the CLE Travelbackers workshop, educating front-line travel and hospitality staff in what it means to give visitors a truly unique, best-in-class, Cleveland experience.



**Frank Fantozzi, CPA, MT, PFS, CDFA, AIF®**  
*President and Founder  
Planned Financial Services*

Frank Fantozzi is pleased to once again host a select group of clients, esteemed individuals, and business owners at **The 9th Annual Cleveland Economic Summit**. 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®**. He leads a growing Cleveland-based independent Registered Investment Advisor (RIA) firm that embraces a team-based approach to delivering timely, actionable, and relevant advice, coupled with comprehensive planning and financial education. Learn more about Mr. Fantozzi at [www.PlannedFinancial.com](http://www.PlannedFinancial.com).

## RSVP

**Please RSVP to reserve seats or a corporate table by  
May 19, 2017 to Michelle Velotta at 440.740.0130 ext. 221 or  
[Michelle@PlannedFinancial.com](mailto:Michelle@PlannedFinancial.com). Space is limited.**

Brecksville Office: 7000 Fitzwater Road, Suite 300, Cleveland, Ohio 44141  
Beachwood Office: 3690 Orange Place, Suite 370, Cleveland, Ohio 44122

Emily R. Roland /John Hancock Investments; Eric Embacher/Destination Cleveland; and Planned Financial Services are all separate, unaffiliated entities.

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