

Don't miss one of Northeast Ohio's most insightful and informative annual events!

# The 12th Annual Cleveland Economic Summit

VIRTUAL EDITION

**TUESDAY, OCTOBER 20, 2020**  
**11:30 AM - 2:00 PM**



Hosted by  
**PLANNED FINANCIAL**  
services  
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Join us for this exciting virtual event to gain perspective on the road ahead for the markets, economy, and Cleveland's beloved Tribe. [Register now](#) to learn:

- Where we are on the road to economic recovery
- How the 2020 election may impact the financial markets and economy
- Where you can expect to see challenges and opportunities in the year ahead
- What's next for the Cleveland Indians and Major League Baseball

Our complimentary program will begin with an online **interactive networking reception** followed by opening remarks from your host, **Frank Fantozzi**, and presentations from our guest speakers.

## Guest Speakers



### Bob DiBiasio

Senior Vice President, Public Affairs – Cleveland Indians

Bob DiBiasio is Senior Vice President of Public Affairs for the Cleveland Indians. This year marks his 41st season with the team and his 42nd season in Major League Baseball. Bob joined the Tribe in 1979. He also hosts the popular "Indians Alumni Roundtable Show" on STO and "Tribe Tales" on the Indians Radio Network.



### Jacob Drossner

Vice President, Portfolio Specialist – ClearBridge Investments

Jacob Drossner is a Portfolio Specialist at ClearBridge Investments, providing capital markets and economic analysis as well as portfolio construction and fundamental equity research insights to audiences ranging from broker/dealers, financial advisors, institutional clients and investment consultants.



### Frank Fantozzi, CPA, MST, PFS, CDFIA, AIF®

President and Founder – Planned Financial Services

For more than 25 years, Frank has led 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. 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®**.

## Agenda

### 11:30 AM - 12:00 PM

Onboarding and virtual networking

### 12:00 - 12:15 PM

Welcome – **Frank Fantozzi**

### 12:15 - 1:00 PM

MLB and the Cleveland Indians

Q&A – **Bob DiBiasio**

### 1:00 - 1:45 PM

Economic and financial market outlook

Q&A – **Jacob Drossner**

### 1:45 - 2:00 PM

Closing remarks – **Frank Fantozzi**

*Guests will have an opportunity to ask questions online throughout the program.*

**REGISTER NOW!**

To learn more about  
**Planned Financial Services,**  
visit [PlannedFinancial.com](http://PlannedFinancial.com)

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