

You and Your Guests are Invited to Join Us for:

The 8th Annual Cleveland Economic Summit

Tuesday, May 24, 2016 • 4:00 pm to 6:30 pm

Mark Your Calendar Today!

Join the Conversation

#ClevelandEconomicSummit



www.PlannedFinancial.com



PROGRAM

"An investment in knowledge pays the best interest." -
Benjamin Franklin

Bring a guest(s) and join us for this complimentary and informative late afternoon event, featuring two distinguished speakers. LPL Financial Vice President and Market Strategist, **Ryan Detrick**, and Horizon Investments Chief Global Strategist and Washington-insider, **Greg Valliere**, will join your host, **Frank Fantozzi**, in providing Ohio investors, business leaders, and taxpayers with keen insight on today's dynamically-charged political and global economic landscape.

Gain in-depth analysis and perspective on the key factors that will impact your business and investment decisions in the coming year, including:

Election Year Policies & Politics: Sizing up the Washington factor and 2016 election cycle. What's really at stake for local investors, taxpayers, and business leaders?

Global Market Outlook: The increasing impact of geopolitical forces on your investment portfolio and business strategy, and why oil, China, and South Korea should matter to you.

Interest Rate Environment: Will the Fed's latest thinking help or hurt the recovery?

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 Financial Market Outlook and Q&A - Ryan Detrick**
- 5:45 pm - 6:30 pm - **Economic Policy & Politics and Q&A - Greg Valliere**



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:



Cleveland Botanical Garden - Clark Hall
11030 East Boulevard • Cleveland, Ohio 44106
www.cb garden.org

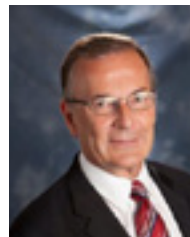
Complimentary Parking at onsite parking garage
(Validate parking ticket with attendant upon arrival.)

SPEAKERS & HOST



Ryan Detrick, CMT
Vice President, Market Strategist
LPL Financial

Ryan Detrick is a Chartered Market Technician (CMT) and member of the LPL Financial Research tactical asset allocation committee, responsible for directly impacting the portfolio decision-making process. He is also a member of the market insights team, developing and articulating equity and general market strategy. A frequent presenter to clients, industry peers, and the national media on emerging and developing market trends, Mr. Detrick has been widely quoted in national media outlets, including appearances on business television and radio programs such as CNBC, Bloomberg TV, and Fox Business.



Greg Valliere
Chief Global Strategist
Horizon Investments

For more than three decades, Greg Valliere has followed Washington for investors. He specializes in coverage of the Federal Reserve and analyzing the impact of policy and politics on the markets. A graduate of George Washington University, Mr. Valliere co-founded The Washington Forum, linking Wall Street with Washington. He is the former Director of Research at the Charles Schwab Washington Research Group, and a frequent guest on CNBC, Bloomberg TV and radio, CNN, Fox Business News and CBS radio. Mr. Valliere is also frequently quoted in The Wall Street Journal, Barron's, and The New York Times.



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

Frank Fantozzi is pleased to once again host a select group of clients, esteemed individuals and business leaders at The 8th Annual Cleveland Economic Summit. Born and raised in Cleveland, he is passionate about helping clients and the community pursue the best possible Return on Life®. He leads through a team-based approach that delivers timely and accurate information, education, and planning, coupled with unbiased and actionable advice. Learn more about Mr. Fantozzi at www.PlannedFinancial.com.

RSVP

Please RSVP to reserve seats or a corporate table by **May 18, 2016** to Michelle Velotta at 440.740.0130 ext. 221 or 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

Greg Valliere/Horizon Investments; Ryan Detrick/LPL Financial; and Planned Financial Services are all separate, unaffiliated entities.

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