



Agenda

Leader Name	Laurence Egle
Leader Email (Contact for meeting questions)	Laurence@EagleHarborFinancial.com
Assistant Email	Gina@EagleHarborFinancial.com
Meeting Date	September 29, 2023, Friday
Meeting Location	American Funds, 3500 Wiseman Blvd, San Antonio, TX 78251

Segment Start Time	Topic	Speaker/Facilitator	Agenda Component(s)
10:00 AM	Welcome <ul style="list-style-type: none"> • Introductions • What was your biggest success? • What did you discover worked well? 	Laurence Egle, CFP® GTC Leader	Rolling Slides Accomplishments and Best Practice Exchange
10:30	Avantax Updates	Guillermo Avalos Avantax Growth Consultant	Avantax Updates
11:00 AM	Business and Marketing Plan By reflecting on your successes and opportunities, and evaluating the future potential and areas of focus, you can set the stage for more meaningful goal setting. Without goals, how do you know if you are succeeding? Goals alone do not ensure success, however. Once you have set goals, analyzing what actions, and how many actions, will be needed will enable you to set a plan for success.	Laurence Egle, CFP® GTC Leader	Avantax Module 1 CPA CPE Credit Hour *See page 2 for full CE details
12:00 PM	Lunch at American Funds Dining Hall		
1:00 PM	American Funds Presentation Capital Group Equity Insights presentation providing an overview of equity market insights, equity strategies at Capital Group and actionable ideas.	American Funds Damien Lona	Sponsor Education 1 CFP® Credit Hour (Sponsored by American Funds)

For Internal Use Only

For more information, including program cancellation, refund policies and any other concerns, please contact training@avantax.com.

Certified Financial Planner Board of Standards Inc. owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNER™ and CFP (with flame logo)® in the U.S., which it awards to individuals who successfully complete CFP Board's initial and ongoing certification requirements.

Avantax is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State Boards of accountancy have final authority on the acceptance of individual courses for CPE credit.

Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org.

2:00 PM	Case Study- Specific Case Goal Setting and Action Steps	Laurence Egle	Case Study Goal Setting and Action Steps
2:30 PM	Tour of American Funds	American Funds	

***Business and Marketing Plan**

By reflecting on your successes and opportunities, and evaluating the future potential and areas of focus, you can set the stage for more meaningful goal setting. Without goals, how do you know if you are succeeding? Goals alone do not ensure success, however. Once you have set goals, analyzing what actions, and how many actions, will be needed will enable you to set a plan for success.

Learning Objectives: Develop goals and a business plan to achieve them.

NASBA Field of Study: Business Management and Organization

Recommended Credit: 1 CPA CPE credit hour

Instructional Delivery Method: Group Live

Program Knowledge Level: Basic

Prerequisites: None

Advance Preparation: None

Authors:

- Nona Rosa, CFP®, ChFC®, ACC, CLU®, Director of Growth Programs, Avantax Wealth Management
- Emily Fox, ChFC®, Director, Education & Programs, Avantax Wealth Management®

Instructor: Laurence Egle

For Internal Use Only

For more information, including program cancellation, refund policies and any other concerns, please contact training@avantax.com.

Certified Financial Planner Board of Standards Inc. owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNER™ and CFP (with flame logo)® in the U.S., which it awards to individuals who successfully complete CFP Board's initial and ongoing certification requirements.

Avantax is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State Boards of accountancy have final authority on the acceptance of individual courses for CPE credit.

Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org.