

Agenda

Leader Name	Laurence Egle
Leader Email (Contact for meeting questions)	Laurence@EagleHarborFinancial.com
Assistant Email	Gina@EagleHarborFinancial.com
Meeting Date	Friday July 21, 2023, at 9:45 a.m.
Meeting Location	Top Golf Austin, 2700 Esperanza Crossing, Austin, TX 78758
Zoom link	N/A

Start Time	Topic	Speaker/Facilitator	Agenda Component(s)
9:45 AM	Welcome <ul style="list-style-type: none"> • Introductions • Avantax Updates 	Laurence Egle GTC Leader Eagle Harbor Financial	Accomplishments and Best Practice Exchange
10:00 AM	Cantor Fitzgerald Capital Presentation: “Investing in the Zone” Discover a tax-advantaged investment strategy through Opportunity Zones <i>*Please see materials from Cantor Fitzgerald Presentation CE information</i>	Matthew Hannon Senior Vice President Cantor Fitzgerald Capital	Sponsor Education 1 CFP® Credit Hour 1 CPE Credit Hour
11:00 AM	Brunch		Meal and Networking
11:30 AM	Allianz Life Insurance Presentation: “Seeking to Improve Client Outcomes During Volatility and Inflation” <i>*Please see materials from Allianz Life Insurance Presentation. Vouchers will be given for online CE credit courses.</i>	Brad Townsend, Regional VP / Retirement Consultant- South Texas Allianz Life Insurance	Free Online WebCE provides: 1 CFP® Credit Hour 1 CPE Credit Hour 12 Insurance Credit Hours No in-person Credit Hours
12:15 PM	Case Study	Laurence Egle	Case Study
12:30 PM	Pacific Financial Group: 401K SDBA	Parker Mosley	Retirement Plans
1:00 PM	Golf & Refreshments sponsored by Pacific Financial Group	Parker Mosley Pacific Financial Group	Networking

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