



Agenda

Leader Name	Laurence Egle
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Meeting Date	June 23, 2023 – Friday at 3:00 p.m.
Meeting Location	Water Street Market Executive Surf Club: 309 N. Water Street, Corpus Christi, TX 78401
Zoom link	N/A

Segment Start Time	Topic	Speaker/Facilitator	Agenda Component(s)
3:00 PM	Welcome <ul style="list-style-type: none"> • Introductions • Share an accomplishment from the last meeting Case Study- Specific Case	Laurence Egle, GTC Leader and Guillermo Avalos, Regional Director Growth Consultant	Accomplishments and Best Practice Exchange Case Study
3:15 PM	Lincoln Presentation, “The Ever-Changing Annuity Landscape” <i>*Please see materials from Lincoln for CE information</i>	Mike Ronaghan and Jordan Williams Lincoln Financial Group	Sponsor Education 1 CFP® Credit Hour
4:15 PM	Networking Break: Appetizers Served		Networking
4:30 PM	Russell Investments Presentation, “Navigate the Complexities of Investment Taxes” <i>*Please see materials from Russell Investments for CE information</i>	Roman Samuels, Regional Director Russell Investments	Sponsor Education 1 CFP® Credit Hour 1 CIMA and/or 1 CPA Credit Hour
5:30 PM	Networking Break: Dinner Served		Networking
5:45 PM	Goal Setting and Action Steps <ul style="list-style-type: none"> • What will you achieve by our next meeting? • What steps will take you to get there? Greeting from First Trust Portfolios, L.P.	Laurence Egle Melissa Taylor, Vice-President First Trust	Goal Setting and Action Steps
5:55 PM	Meeting Closure	Laurence Egle	
6:00 PM	Social Hour Sponsored by First Trust Portfolios, L.P.	Melissa Taylor	Networking

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