

# Fall Financial Summit

October 27<sup>th</sup>, 10:00am - 3:00pm

The DBS Companies are proud to invite you to our complimentary Fall Financial Summit! We are featuring three leading experts in the areas of estate planning strategies, capital markets, and financial planning. Each of our speakers will draw from their years of experience and share actionable ideas for attendees to integrate into their own planning.

## Educational Objectives:



### Estate Planning for Dentists

*Robert Perry, JD, Butzel Long*

- Learn the importance of estate planning, no matter what age you are
- Avoid legal and financial pitfalls
- Strategies to confidently protect your assets for future generations



### Portfolio Ideas for the Current Market Environment

*Patrick Tarkey, Vice President & Client Advisor, J.P. Morgan Asset Management*

- Learn about the current economic landscape and outlook
- Discover key drivers and trends taking place in the markets
- Explore investment themes for solid portfolio construction



### Financial Planning Strategies

*Ted Schumann, MBA, MSF, CFP®, AIF®, Managing Partner, DBS Investment Advisers, LLC*

- Integrate estate planning with your overall financial plan
- Learn strategies you can use to manage taxes in retirement
- Structure your portfolio for success

## Event Details:

**Location:** 811 Square Lake Rd,  
Troy, MI 48098

**Lunch:** Will be provided

**Format:** Lecture

**CE Credit:** 4 hours

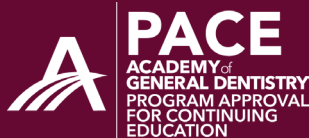
**Subject Code:** 550

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800-327-2377 ext. 1



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