



Event Plan Blue Print

A Guide to Developing and Executing a Successful Event

Creative Financial Group

March 2012



CFG
CREATIVE FINANCIAL GROUP
Financial Navigation To Help You Reach Your Lifetime and Legacy Goals

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Introduction

This Event Blueprint has been designed to take you through the process of planning, hosting and maximizing an event. It includes important information such as:

- Planning Success Tips
- Marketing Support
- Recommended Timelines
- Pre and Post Marketing Strategies
- Budgeting and Tracking

Before you begin the planning process for your event, please appoint one person on your team (team leader-steering committee) who will be responsible for reviewing and following the suggested approaches outlined within this blue print and coordinating your event with the marketing department.

Additionally, it is strongly recommended that the minimum time to plan a (successful) event is twelve weeks. Taking a proactive approach to planning your events will result in new relationships and ultimately new business.

The following guide is by no means all-inclusive, but it is designed to assist you in planning your team events. Please adapt this guide to fit your needs.

CHAPTER 1

Developing an Event Strategy

16-12 weeks before the Event

Identify Your Event Steering Committee and Team Leader

The first step in planning your event is to develop a steering committee. This committee should be created at least twelve weeks before the event date. It should include at least two people from your team as well as your team coach and the marketing coordinator. There should be one person who is considered the team leader of the steering committee. He or she will ultimately be responsible for ensuring the event plan has been properly developed and implemented. Communication is a key ingredient to a successful event. Therefore; the steering committee's team leader will also be responsible for providing an update at each team meeting.

The team leader will be responsible for interacting with the team to obtain approvals and feedback, executing the components of the event plan and ensuring post marketing activities are fulfilled. Additionally, the team leader is responsible for creating the event timeline, submitting all required documents to marketing for compliance purposes, adhering to budget, executing marketing plan and providing updates to the team on a consistent basis.

It is recommended that the steering committee hold regular meetings. Create a schedule for committee meetings and prepare agendas for each meeting. During the first few months of the planning process, consider meeting twice per month. As the event approaches, the steering committee may meet weekly.

Checklist:

12 Weeks before event:

- Identify members of steering committee
- Appoint team leader
- Create schedule for committee meetings
- Add event to team meeting agenda
- Contact Marketing event coordinator; invite to meeting
- Complete Chapter 1 during/before first committee meeting

CHAPTER 1

Developing an Event Strategy *(continued)*

16-12 weeks before the Event

Defining the purpose of the event is a critical component of an event plan. A strategic assessment of goals, messaging and planning will further ensure that the event provides tangible value to the team. The following questionnaire will serve as the basis for your event plan.

Determine the objectives of the event (or what you want to accomplish). By hosting this event, our team wants to:

- Attract new clients
- Educate clients
- Say thank you to clients
- Bring clients, prospects and suspects together/networking
- Reinforce CFG's knowledge and credibility in the marketplace
- Bring team closer together –teambuilding
- Attract new recruits
- Promote a product or service
- Obtain recommendations from clients
- Other:

Define the target audience:

- Tier One Clients
- Tier Two Clients
- Tier One Suspects/Prospects
- Tier Two Suspects/Prospects
- CFG Team
- Potential Recruits
- Male Only
- Female Only
- Couples
- Other:

What are the criteria producers will use to choose attendees?

-
-
-
-
-

CHAPTER 1

Developing an Event Strategy *(continued)*

16-12 weeks before the Event

Determine the type of event. Our team would like to host a:

- Golf Outing
- Wine Tasting
- Women-Only Event
- Sports Box
- Seminar
- Client-Only Dinner
- Gentleman's Outing/Cigar Evening
- Client-Couple Event
- Boat/Cruise Event
- Other

Why would someone choose to attend your event over another, including not attending at all? What will make this event worthwhile?

- Unique Location or Activity
- High-End Dining or Locale
- Engaging Speaker
- Current Topic
- Social Environment
- Networking Opportunities
- Other

This event will take place:

- | | |
|------------------------------------|------------------------------------|
| <input type="checkbox"/> Morning | <input type="checkbox"/> Weekday |
| <input type="checkbox"/> Afternoon | <input type="checkbox"/> Weeknight |
| <input type="checkbox"/> Evening | <input type="checkbox"/> Weekend |

This event will take place during the month of:

- | | |
|-----------------------------------|------------------------------------|
| <input type="checkbox"/> January | <input type="checkbox"/> July |
| <input type="checkbox"/> February | <input type="checkbox"/> August |
| <input type="checkbox"/> March | <input type="checkbox"/> September |
| <input type="checkbox"/> April | <input type="checkbox"/> October |
| <input type="checkbox"/> May | <input type="checkbox"/> November |
| <input type="checkbox"/> June | <input type="checkbox"/> December |

CHAPTER 1

Developing an Event Strategy *(continued)*

16-12 weeks before the Event

What dates/days of the week are being considered for the event?

-
-
-
-

When determining the timing of the event, consider:

- Are any other teams planning a similar event? Instead of competing, consider collaborating.
- Have you checked the Agency event calendar to ensure there is no duplication of efforts?
- When are your guests most likely available to attend based on their schedules?
- When is the best time for your team to hold the event?

The number of guests (other than CFG personnel) we would like to attend:

Consider inviting at least twice as many individuals as you want to attend.

A few additional considerations:

- Conduct an initial team meeting to determine event plans and the Marketing support needed, as well as how the financials will be handled. (Reference Chapter 2 - "Event Planning Sheet")
- Create an RSVP tracking form. Use the following fields: Client Name, Producer Name, Telephone Number, Address, Email (if applicable), Attending, Bringing a Guest, Name of Guest, Actually Attended

CHAPTER 2

Planning the Event

12-8 weeks before the Event

Week 12

Create the event budget. Track actual cost of event. Finalize how the team will be charged

Site	Estimated	Actual
Room fees		
Site staff		
A/V Equipment		
Tables and Chairs		
Total		

Marketing & PR	Estimated	Actual
PR Services		
Printing		
Postage		
Total		

Miscellaneous	Estimated	Actual
Parking		
Transportation		
Supplies		
Other		
Total		

Refreshments	Estimated	Actual
Food		
Drinks		
Linens, Dishes, Utensils		
Staff and Gratuities		
Total		

Total Expenses	Estimated	Actual

CHAPTER 2

Planning the Event *(continued)*

12-8 weeks before the Event

Week 12

- Begin researching locations; set up appointments to view locations & discuss event with location representative.
- Based on the type of event, what 3 best locations come to mind?
 - 1.
 - 2.
 - 3.
- Where would your guests prefer to attend this event?
- Which location could potentially increase the RSVP rate?
- Can the venue accommodate production, A/V, sound or other technical needs?
- Does the event location offer convenient parking?
- If the event is held during the summer months, is there sufficient air conditioning?
- Can the venue accommodate outdoor or patio access if necessary?
- Does the condition of the facility reflect the high standards of your team and the agency?
- What is the tenure of the conference manager or catering manager?
- Will the venue management treat you like a VIP or just one of multiple programs?
- Is the conference manager willing to be flexible to accommodate your requests?
- Do the venues you're considering fall within your budget?

Week 11

- Coordinate location details and speaker details
 - Does the speaker have any special requests such as video clips, wireless microphone, laptop, lcd projector, flipcharts, etc.?
 - Based on the type of event held; investigate need for special permits, insurance, etc.?
- Review and choose food and beverage options
 - Determine timing of food distribution and/or if service will be available during event
 - Consider time of day (ie: heavy appetizers vs. light, main course, etc.)
 - Consider type of food and seating to accommodate (ie: guests with plates on their laps) Buffet or sit down menu?
 - Are there any dietary restrictions?
 - Will alcoholic beverages be served?

CHAPTER 2

Planning the Event *(continued)*

12-8 weeks before the Event

Week 11

- Formulate agenda for event (times, presentation titles, speaker full names, bios, photos-if needed)
- Decide who will do the Welcome and Closing (aka 'MC').
 - Provide event 'MC' with specific information to convey such as:
 - Completing Evaluation Form at End of Event
 - Whether to ask questions during the presentation or hold to the end
 - What time beverage and/or food service ends
 - Location of restrooms

Week 10

- Book a photographer/videographer (if needed); Marketing has a list of recommended vendors
- Reserve any needed audio/visual equipment (Tech Support)
- Notify the event location representative of the technology needs for the presentation

Week 9

- Develop team's invitee list(s) (reference your responses from Chapter 1)
- Submit Event/Invitation Request Forms to Marketing (page 13)

Week 8

- Check status of event/invitation compliance approval with Marketing

CHAPTER 3

Marketing the Event

7-5 weeks before the Event

- Send out Save the Date to team's group of invitees (reference page 13 to order)

Sample:

Save the Date

CFG Wealth Advisory Group Presents
New Estate Planning Opportunities & Investment Strategies for Today's Economic Environment

An Investment & Estate Planning Seminar **Thursday, April 7th**
5:00 pm - 7:00 pm
Brew River Restaurant & Bar
Salisbury, MD

Courtesy of Agent Name, CFP®



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- Print out Call List and Save the Date to give to the calling agent/person(s) on the team
- Begin to call list of invitees to get them excited about the event

Sample Telephone Script:

Hello, my name is _____, calling from the _____ team at Creative Financial Group. I hope you received our invitation to the (insert type of event), to be held on (insert date). Do you think you will be able to attend?

If yes: That's great news! We look forward to seeing you.

If no: That's too bad. But we'll be sure to send you a recap of the event.

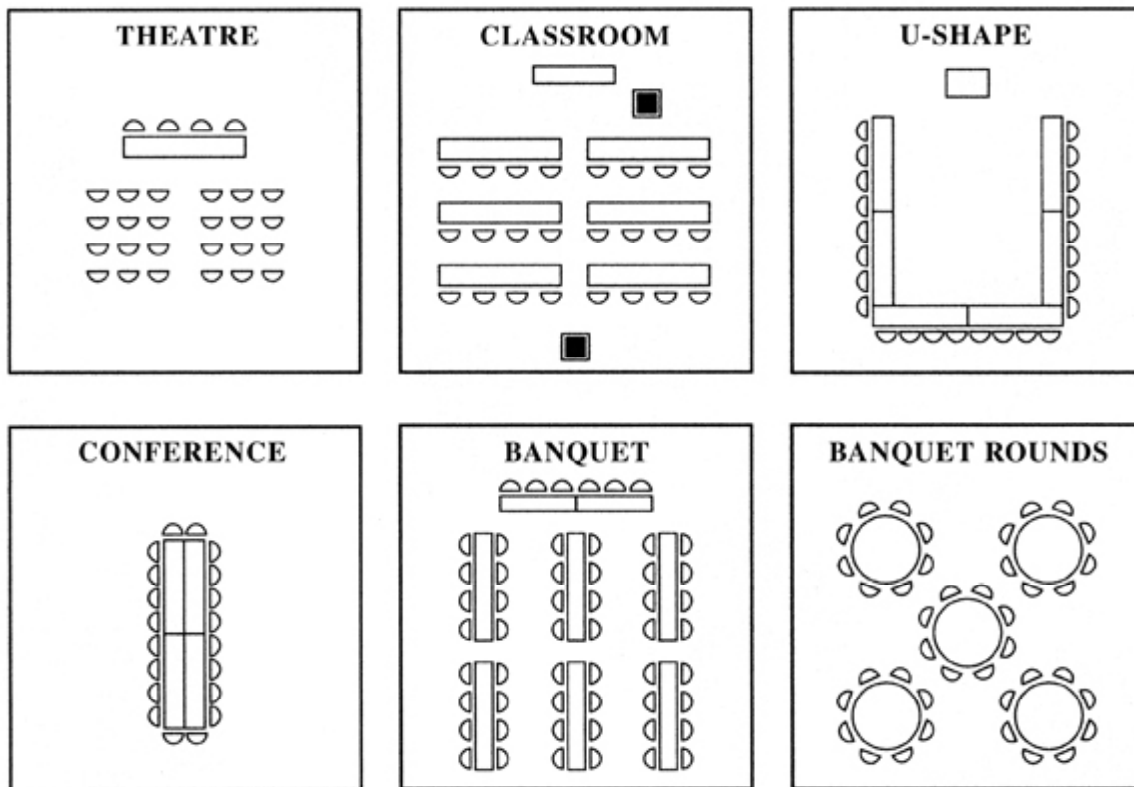
CHAPTER 3

Marketing the Event *(continued)*

7-5 weeks before the Event

- ☐ Confirm menu, room design, technology needs, and parking

Sample:



CHAPTER 3

Marketing the Event

7-5 weeks before the Event

Week 6

- Complete estimate sheet, and get approval on financials
- Develop the invitation – (see sample to the right)
- Send invitation to compliance for approval

Week 5

- Send out all invitations to team's group of invitees
- Print out or email call lists and invitation to give to the reps doing the calling.
- Determine if the event is newsworthy. One way to determine newsworthiness is by evaluating the elements of the event. Consider if the event offers any current information local newspaper readers or radio listeners would be interested in learning more about.

A media advisory will be developed and distributed should your event be deemed newsworthy.

- Please discuss your event with the marketing department to determine if it is newsworthy.

CREATIVE FINANCIAL GROUP INVITES YOU TO ATTEND

Current Strategies in
Estate Planning & Investing



Thursday, March 10th
6:00-6:30 pm Cocktails
6:30 pm Dinner & Presentations

Location
219 East Main Street
Lock Haven, PA 17745

RSVP by March 4th
to Contact Name
at 610.455.1212
name@cfg.nef.com

Investing in Uncertain Times
Speaker Name
Managing Associate & Investment Specialist

Harry will discuss market cycles and how they influence long-term investment results. He will present a practical approach to aligning one's investments with a variety of economic environments: inflationary, deflationary, and stable environments.

Estate Planning in the New Tax Environment
Speaker Name, JD, LL.M
Senior Planning Strategist

A 20-year veteran attorney, Paul designs estate plans for business owners and for owners of land and mineral rights. He will discuss the new tax environment and present a case study of advanced techniques.

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Agent Name is a registered representative of New England Securities (member FINRA/SIPC), a broker-dealer and registered investment adviser. Creative Financial Group is not affiliated with New England Securities. L0211161168[exp0211][DE,NJ,PA]

CHAPTER 4

Finalizing Event Plans

4-1 weeks before the Event

Week 4

- Confirm who will be staffing the event and their roles
- Make follow-up calls to all invitees to register them for event
- Track Registration (use Tracking Form/reference Chapter 1)
- Develop "Introduction Presentation" w/ team (if applicable)

Week 3

- Develop the follow-up letters: attendee & non-attendee and send to compliance (samples available in Appendix B)
- Develop the event overview (if applicable)
- Decide what is going to be included in the seminar packets (agenda, evaluation, speaker handouts, other pieces, etc.)
- Forward each agent their registered guest list (Call each team member to remind them)

Week 2

- Finalize all last minute details/confirm with Speaker (marketing to assist if necessary)
- Final RSVP list due to event manager at location
- Create "Do Not Forget" list for event day (ie: batteries, nametags, RSVP tracking form, sign in sheets, speaker contact information, etc)

Week 1

- Call to confirm agenda and directions to the event
- Put together seminar packets (agenda, evaluation, speakers' bio & handouts, note pages, company literature, etc.)
- Print registration list and name tags for event (Mail-merge directions available from marketing)
- Print Event Sign In sheets (Appendix C)
- Create seating chart for guests where appropriate
 - Seat clients next to prospects
 - Avoid "clusters" of CFG personnel
- Review "Day Of Checklist"
- Confirm technology at the event location
- Check batteries, etc. on all in-house A/V equipment; make sure to have extra audio and video tapes
- Confirm Photographer/Videographer

CHAPTER 4

Finalizing Event Plans *(continued)*

4-1 weeks before the Event

3 Business Days Before Event

- Coordinate presentation set up with in-house tech. support (if applicable)
- Give location final head count

1 Business Day Before Event

- Pick up in-house reserved equipment

Chapter 5

Day of Event

Day of the Event

- Arrive early to event so guests are not waiting
- Double check the room set up
- Add table numbers if assigning seating
- Review "Do Not Forget" List
- Set up registration table, nametags, signage, A/V equipment, food & beverage, etc.
- Make sure to attend to all guests (work the room)
 - Take the initiative to approach others, introduce yourself, and share a piece of information.
 - Listen carefully to discover shared interests.
 - Make introductions to other guests or internal personnel.

CHAPTER 6

Follow Up/ROI/Tracking

1-4 weeks after the Event

Post:

- Begin post follow-up invoicing
- Provide marketing with paid invoices for sponsors for their participation if applicable
- Develop call list of attendees and non-attendees for team
- Send Thank you notes to speakers other than CFG or TAC
- Send Thank you notes to all attendees
- Pay or submit POs for all balances for vendors
- Finalize team charges
- Evaluate the event
 - Review any marketing surveys that were filled out by your guests
 - Did the team meet their event objectives? (as outlined in Chapter 1)
 - Did the team meet the budgetary goals?
 - Was there enough marketing for this event? How could it have been made better?
 - Would the team utilize the same speaker? Host at the same location?
 - Was the event well attended?
- Team to review which attendees and non-attendees should receive follow up letters
- Team to determine if an event overview will be mailed with the follow up letters; if so, work with marketing to develop event overview
- Once compliance approved, mail out selected attendee and non-attendee letters & overviews
- Print out call lists for team members of attendees and non-attendees that were sent a follow-up mailing; include a copy of what was sent

Weeks 1 & 2 after event

Make follow-up phone calls to your list of attendees and non-attendees to set up appointments

Weeks 2 & 3 after event

- Add any attendee or non-attendee that does not result in an appointment to cultivation program (like PDI and Newsletter)
- Calculate the ROI (return on investment)
- Reference completed budget sheet (Chapter 2)
- Reference tracking and event sign in sheets (Chapter 1, Chapter 4)
- On a quarterly basis, the Steering Committee Team Leader should work with the team to receive updates on any new business sold as a result of the event.

APPENDIX A

Marketing Event Submission Request

For marketing assistance with coordination of team events, please use the following for submission of event requests.

Please submit all requests for team events and invitations to Lauren Berardinelli, *Marketing Events Coordinator*, at least 8 weeks in advance of the event using the following form. Marketing will handle all of the following:

- Coordinate all details of your event with your team leader, ensuring all pre, present and post event marketing is completed
- Schedule and confirm all speakers
- Identify presentation materials
- Coordinate with sponsors where applicable
- File event and sponsorship for approval with compliance
- Design save-the-date and/or invitation
- File invitations for compliance approval
- Print invitations if requested (for a fee of \$.50 per invitation with envelopes)
- Supply email ready file for save-the-date and/or invitation
- Invoice sponsors and complete the submission to NES for reimbursement

If you need help with any additional aspects of planning your event, please contact Mary Suplee. The marketing department will be happy to assist.

Sufficient lead time is extremely important, especially for seminars, as there are some very stringent compliance requirements and a specific process we need to follow. First presentations are approved, then the event can be submitted and approved and finally, only when the event has been approved can any invitation materials be submitted for approval. Any topics listed on invitations must match up with the presentations submitted with the event approval. Where sponsorship is involved, it may take 6-8 weeks following the event to receive any reimbursement funds, again due to the process followed to submit requests for sponsor funds.

IMPORTANT REMINDER:

For seminars, you must attach a seminar sign-in sheet to the event in SMRS following your event. Please forward the scanned list to Lauren Berardinelli so it can be attached to the event submission.

Event Request Form

Please Submit Requests **at least 8 Weeks** Prior to Your Event to Mary Suplee/Marketing.

Date: _____ Type of Event: () Seminar () Client Appreciation Event

Team or Agent(s) Hosting: _____ Team contact: _____

Date to be held: _____ Time: _____

Location of event: _____

Invitees: () Clients () Prospects (only for seminars)

How are invitees chosen? (Tier 1, target market, etc.): _____

States where invitees reside: _____

Number to be invited: _____ Number expected to attend: _____

How many invitees have purchased a financial product or service in the past six months: _____

How many invitees are currently discussing the purchase of a financial product or service: _____

Please Note: If any invitees have purchased or are currently discussing the purchase of financial products or services, please sign below stating that the invitees would have been invited regardless of their recent or subsequent purchases.

Registered Representative Date

■ COSTS

Food and Beverage: \$ _____ per person Facility Rental: \$ _____

Entertainment: \$ _____ Describe _____

■ For Seminars ONLY

Title or topic: _____

Speakers requested: _____

Approved Presentation(s) L# (if known): _____

■ SPONSORS

Seeking sponsorship? () YES () NO

Sponsors must be given the opportunity to speak to the attendees and their presentation must be pre-approved before the event will be approved. Requests must be received in sufficient time prior to event. Documentation of expenses paid will be required for reimbursement.

I acknowledge that the event is being submitted based on the information provided on this form. I also understand that if I fail to properly disclose something, I may be violating Firm policy and could face consequences from the Firm and possibly FINRA. Before signing below, please be sure that you fully understand the Potential and Perceived Conflicts of Interest Chapter from The Representative Compliance Manual.

Registered Representative Date

Please complete the invitation request form, if invitations are required.

For Internal Use Only

FOR MARKETING USE ONLY

Submitted to SMRS by:

Submitted On:

Submission #

Approval #

Invitation Request Form

Please Submit Requests **at least 8 Weeks** Prior to Your Event to Mary Suplee/Marketing.

Have you completed an Event Submission Form for this Event? () yes () no **If not who is submitting your event to SMRS?**

Event Approval # (if available): _____

Today's Date: _____ Date Invite's Needed by: _____

Team or Agents Hosting: _____

() CFG-all agency-event () Private () CFG Sponsor event

Requested by: (team contact) _____

Name of event: (as will appear in invite) _____

Description of event: _____

Location (provide address): _____

Parking Provided: () Yes () No () N/A

Date of event: _____ Time: _____

Save the date needed: () Yes () No

RSVP by date: _____ RSVP to whom: _____

RSVP Contact Phone# _____ E-Mail: _____

Total # of printed invitations needed: _____

Guest speaker(s): _____

Sponsor(s): _____

Other persons involved: _____

E-Mail Invite needed: () Yes () No

Please send PDF draft file to: _____

Special instructions: _____

For Internal Use Only

FOR MARKETING USE ONLY

Invite submitted to SMRS by:

On:

Submission #

Approval #

APPENDIX B

Event Specific Success Tips

Golf Outing

- Determine ahead of time how you will handle registration fees before the event.
- Ensure you are pairing the “right” people together to create networking opportunities.

Client Appreciation

Hosting a client appreciation event is a great way to show your clients they are valued and appreciated. Because people want to work with those they like and trust, a natural result from this type of interaction is new business or referrals.

- Consider what message you want to convey about your business. Should this event “wow” the client or be more relaxed?
- A few examples of themes include: Wine tasting/dinner, Picnic in the park, Sports event/happy hour, Hawaiian Luau, Chocolate Tasting, Dinner cruise

Team Building

- Team building events can be fun and boost morale, but can also be designed to help address a work or communication problem.
- Determine the purpose of the event:
 - Address a team deficiency?
 - Improve the team’s communication?
 - Boost team innovation?
 - Help the team strengthen work relationships?
 - Discuss and resolve a particular team conflict?
 - Recognize your team by celebrating a team achievement?
 - Support a favorite charity?
- Identify the type of team building event:
 - Celebration to recognize achievements.
 - Workshop to enhance team’s ability to resolve conflict.
 - Planning session to improve communication and set expectations.
- Follow-up once the event is held to review outcomes. Gain group feedback regarding effectiveness.
- Determine if the event helped the team achieve the intended goal.

APPENDIX B

Event Specific Success Tips *(continued)*

Wine Tasting

A wine tasting event is a unique way to bring clients, suspects and prospects together to learn about wine.

- Determine what type of tasting party you want to hold: You may choose to include cheese pairings or focus on one particular wine region.
- Design a tasting card: This would specify information such as type of wine, the producing vineyard, and a description of the wine. The tasting card may also include an area to “grade” each wine in the areas of appearance, aroma, flavor and cheese pairing. Each guest should have their own tasting card to record their findings.
- Choose the right menu: While a traditional wine tasting may not include a full dinner menu, it’s important to provide, at minimum, heavy appetizers for the guests.
- Create an inviting environment: Consider decorating the room using white table cloths, candles and vintage bottles. It’s important to keep the room well lit and festive. You may also choose to have banners or table tents displaying wine facts.

Sports Box

- Be sure to review what is included with each package (ie: menu, beverage, gratuity, etc.).
- Have cash on hand.
- Bring a “going home” gift for each guest. This may include current CFG articles, pens, or autographed sports paraphernalia.

APPENDIX C

Follow Up Letters

John Smith
123 Main Street
Anywhere, PA 14781

Dear Mr. Smith,

I am sorry you weren't able to attend the CFG Asset Management Investment Seminar, *Investing In Today's Uncertain Times*, held on February 23rd at the Philadelphia Union League.

James Unger, CFP, president of CFG Asset Management gave his perspectives on the current economic landscape and proposed several strategies for investing in secular bear markets. Strategies presented included focusing on income investments, approaches to structuring portfolios in this environment and investing in global, multi-asset classes using ETFs. The presentation was followed by a session that allowed the audience to pose their questions regarding investing to our panel of experts.

I would be happy to meet with you to discuss any of the topics that were discussed or to address any concerns you have or opportunities you see for your future. I will be in touch soon, however, feel free to contact me before that time at 610-xxx-xxxx or RepName@cfg.nef.com.

Several investment seminars are scheduled to be held throughout the year. I hope that you will be able to join us at a future program. I look forward to the opportunity to help you reach your financial goals.

Sincerely,

Rep Name
Approved Title

P.S. CFG is hosting an information seminar on November 16, 2011 at Aronimink Golf Club on the topic of "Investing In Today's Uncertain Times." We have three knowledgeable speakers that will share their perspective on the current economic landscape. If you are interested in attending, please contact me by November X, 2011.

