

Edward Jones

2017 Continuing Professional Education Conference

Wednesday, September 20, 2017

Fetzer Center,

Western Michigan University

2350 Business Ct.

Kalamazoo, MI 49008

Remittance For: Company Name: _____

Persons Attending: Email Address: Amount Remitted:

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Total _____ # of Attendees x \$95.00= _____

Please Make Check Payable To:

Edward Jones

5787 Stadium Drive, Suite A

Kalamazoo, MI 49009

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Wednesday, September 20, 2017

Fetzer Center, Kalamazoo, MI

Program qualifies for up to 8.0 CPE, EA and CFP credits including 2.0 hours of Ethics credit

Agenda

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|---------------|---|
| 8:00 | Sign-in and Materials Pick Up |
| 8:25 | Introduction of Financial Advisors |
| 8:40 – 10:20 | Business Ethics in an Unethical World
<i>Tom Burt, Executive VP, Chief Operating Officer, Duncan Aviation</i> |
| 10:20 – 10:35 | BREAK |
| 10:35 – 11:25 | Making Sense of Today's Economy and Investing
<i>Kate Warne, Principal Investment Strategist, Edward Jones</i> |
| 11:25 - 12:15 | Guide to Retirement
<i>Katherine Roy, Managing Director, Chief Retirement Strategist, JPMorgan</i> |
| 12:15 – 1:00 | LUNCH |
| 1:00 – 2:40 | Social Security: Financial Professionals
<i>Vonda Vantil, Public Affairs Specialist, Social Security Administration</i> |
| 2:40 – 2:55 | BREAK |
| 2:55 – 4:35 | Elder Law Update
<i>Stacey Lott, Attorney at Law</i> |