



**Ulin & Co.**  
WEALTH MANAGEMENT

*Client Summer Education Series*

## Investment Themes 2017- Capital Markets Outlook

This informative workshop will deliver clear context to today's economy and the financial markets while providing sound wealth management strategies. Dynamic speaker Walt Cziacki, CFA® will capture key investment themes and trends that are poised to shape markets in the latter half of 2017 as we face growing uncertainties regarding interest rates, President Trump's looming policies and many global economic headwinds as the aging Bull market pushes through its 8<sup>th</sup> year.

**DATE:** Thursday June 22<sup>nd</sup>    **TIME:** 6:30pm – 9pm    **PLACE:** Ruth's Chris Steakhouse  
225 NE Mizner Blvd, Boca Raton, FL 33432

**RSVP:** Donna Munaco (561) 210-8625

\*You and a guest are invited to RSVP by May 31<sup>st</sup>



**Walt Cziacki, CFA®**

Walt Czaicki serves as a Senior Vice President and Senior Portfolio Manager for Equities at Alliance Bernstein (AB). Walt resides in Denver and has been working in the investment-management industry since 1986.

Mr. Czaicki's roles have ranged from a fundamental equity research analyst and portfolio manager to Chief Investment Officer. He holds a BSBA in finance and an MBA, both from St. Louis University and holds the prestigious Chartered Financial Analyst® designation



**Jon W. Ulin, CFP®**

Jon W. Ulin, CFP®, Private Wealth Advisor, is the Founder and Managing Principal of Ulin & Co. Wealth Management. Jon holds a BBA in Accounting & Finance from Temple University in Philadelphia. Mr. Ulin works primarily as a 'fee-based' investment advisor and is responsible for all aspects of our clients' portfolio management and financial planning services.

Jon is a sought-after speaker for both community and corporate events and is often quoted by national news and media outlets. His goal is to help clients pursue and maintain financial independence, a successful retirement and a lasting legacy.

### **Sponsors:**

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