



Client Summer Education Series

## Investment Themes 2017

Join us for an interactive and informative discussion with top regional investment directors from major Wall Street firms. Led by your questions, our dynamic panel will focus to cover key investment themes and trends from Washington to Wall Street that are poised to shape the markets in the latter half of 2017 and beyond. Learn how to put stock market news and history into perspective while developing disciplined strategies to help effectively manage wealth in today's challenging market environment. Bring a guest – and your best questions!

**DATE:** Wednesday June 14<sup>th</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>



Galey Gravenstein  
Regional Vice President  
Goldman Sachs



Joseph McGivney  
Regional Vice President  
American Century



Steven J. Widder  
Regional Director  
Eaton Vance



James Mugno  
Regional Vice President  
Oppenheimer



### 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.

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