PRESENTED BY MOUNTAIN PACIFIC BANK

# THE 2022 BUSINESS EXPO

Tuesday October 18, 8AM

— LYNNWOOD CONVENTION CENTER —

## PLEASE JOIN US

Don't miss this opportunity to hear what's in store for 2023 and how it could impact your business and financial decisions. The day covers a diverse set of subjects including real estate, investments, tax planning, health insurance, and cyber security.

**7:30am**
Complimentary coffee and pastries

**8:00am – 9:30am**
Matthew Gardner, Chief Economist for Windermere Real Estate – Economic Forum

**9:30am – 10:30am**
Christian Newton, Vice President of Dimensional Funds Advisors – 2022 Life After the Petri Dish, making choices for success in an uncertain future

**10:30am – 10:45am Break**

**10:45am – 11:15am**
William Schatz CFP, AIF VP of Investments, Elliott Cove Capital Management - How the "Secure Act 2.0" will impact retirement plans

**11:15am – 12:15pm**
Brian Evans, CPA/PFS for Madrona Financial – Tax Planning Opportunities For Business Owners, Real Estate Investors, and Higher Net-Worth Individuals

**12:15pm – 1:15pm Lunch Break**
Courtesy of Gravity Payments

**1:15pm – 2:15pm**
Ken McLarin, Sr Security Consultant for e3 Technology – IT Security and protecting your business from online fraud

**2:15pm – 2:45pm**
Daniel Pedack, Insurance Specialist – Group & Individual Health Insurance Products for 2023

**2:45pm – 3:00pm**
Raffle drawings and closing remarks

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**RSVP for this complimentary event by calling 425.263.3500**

**Matthew Gardner**
As Chief Economist for Windermere Real Estate, Matthew Gardner is responsible for analyzing and interpreting economic data and its impact on national and regional real estate markets.

In addition to his day-to-day responsibilities, Matthew sits on the Washington State Governors Council of Economic Advisors; chairs the Board of Trustees at the Washington Center for Real Estate Research; and is an Advisory Board Member at the Runstad Department of Real Estate at the University of Washington where he also lectures in real estate economics.

Matthew's economic forecasts are used by the Federal Reserve Bank of Philadelphia, and his housing forecasts are used by Reuters in their U.S. Housing Market forecast and by Zillow in their National Home Price Expectation Survey.

Matthew received his undergraduate degree in economics from St. Johns College, Oxford, and he holds graduate degrees in economics and econometrics from the London School of Economics.

**Christian Newton, Vice President**
Dimensional Fund Advisors

Christian Newton helps financial advisors leverage Dimensional's capital markets research and its application to portfolio and practice management. He has been with Dimensional for over ten years in various roles, including a Regional Director working directly with some of the largest financial advisory firms in the US. He is passionate about making a positive impact in investors' lives and about sharing his experiences and expertise to help others. Christian Is a frequent speaker at conferences and industry events on topics such as capital markets, client communication, and investor discipline.

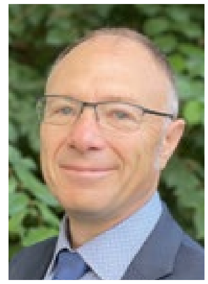
Christian experienced the first wave of internet growth working at consulting conglomerate USWeb/CKS. He holds a BA in history from the University of Massachusetts at Amherst. His online writing has been profiled in the New York Times and Entertainment Weekly.

**Brian Evans - CPA / PFS**

Brian Evans is a nationally published author, radio host, CPA and Personal Financial Specialist. He began his career in accounting and has been a CPA since 1986. Since then, he founded Madrona Financial & CPAs, which currently employees over 30 people and manages over $500 million in assets.

His expertise in the investment markets has been featured in several live appearances on CNBC Closing Bell and the Fox Business Network. He was also honored to ring the bell to open the New York Stock Exchange in 2011.

Evans weekly radio show, Growing Your Wealth, can be heard on KTTH 770 AM, KVI 570, or wherever you get your podcast. Recently, he publish the book "7 Steps to a Successful Retirement", which can be found on Amazon for purchase.



**William Schatz**
Willi Schatz is Vice President of Investments at Elliott Cove Capital Management. He is responsible for overall sales management, account development and education within our customers and advisors. He also specializes in the Business Retirement Plan space where he regularly conducts seminars and is a frequent speaker. Willi has been embedded in Elliott Cove since its infancy.

Willi holds a B.A. in Business Administration with a specialization in Economics and Finance. He holds the CERTIFIED FINANCIAL PLANNER™ and Accredited Investment Fiduciary (AIF®) designations.

When not calming clients and educating advisers he finds quality family time with his wife Dawna and his two girls, Maria and Olivia. You might find him out with the cows or playing the accordion at Swiss events. He is active in his community on the Stanwood-Camano Community Fair Board and as the President of the Tacoma Swiss Sportsman Club.

**Ken McLarin, Sr Security Consultant**
Mr. McLarin is a senior security consultant with over 25 years of technical experience across a wide range of disciplines including leading multi-discipline teams, web development, project management and information security.

He has specific expertise in the areas of technical project management, vulnerability and social engineering testing, penetration testing, firewall management, database management and systems and network administration. Over the past 10 years his focus has been on working with development and audit teams in the area of information security.

**Daniel Pedack**
Daniel Pedack is an Insurance Specialist at Mountain Pacific and our business affiliate, Mountain Pacific Insurance Services – serving in that capacity since 2018.

Daniel has steadily worked in the insurance industry garnering experience and exposure to multiple lines of coverages. Daniel earned a Master of Arts Degree from Western Governors University in Learning and Technology, and a Bachelor of Arts from Pacific Lutheran University. As a former schoolteacher of four years, Daniel began to pursue his interest and passion in the insurance industry. Joining State Farm as an Insurance Agent, Daniel sold and serviced a variety of insurance product offerings. Currently, Daniel is licensed to underwrite insurance policies in California, Georgia, and his home state of Washington – with a focus in the Group & Individual Health Insurance, Medicare Advantage & Supplements, Flood Insurance and Specialty Property & Casualty sectors. Having grown up in Washington, Daniel has a demonstrated a strong passion and commitment to be involved in our community.

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