PRESENTED BY MOUNTAIN PACIFIC BANK

THE 2023 BUSINESS EXPO

Tuesday October 10, 8AM | Lynnwood Event Center

PLEASE JOIN US

Don't miss this opportunity to hear what's in store for 2024 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
Brian Evans, CPA/PFS for Madrona Financial - Tax Advantaged Investment Strategies

10:30am – 10:45am Break

10:45am – 11:45am
Rob Harvey, Senior Investment Strategist and Vice President of Dimensional Funds Advisors

11:45am – 12:15pm
William Schatz CFP, AIF VP of Investments, Elliott Cove Capital Management – Secure Act and Your 401K

12:15pm – 1:15pm Lunch Break

1:15pm – 2:15pm
David Tingstad, Lawyer of Beresford Booth PLLC – The Succession Planning Challenge

2:15pm – 3:15pm
Zac Delecki, Supervisory Special Agent, Department of Justice - Cyber Security - Understanding the Risks

3:15pm – 3:45pm
Daniel Pedack, Insurance Specialist – Group & Individual Health Insurance Products for 2024

3:45pm – 4:00pm
Raffle drawings and closing remarks

MOUNTAIN PACIFIC bank

Keeping it local

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 (Roy-turz) 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.

Brian Evans

Brian Evans is a nationally published author, radio host, CPA and Personal Financial Specialist. His expertise in the investment markets was also featured in a number of live appearances broadcasted 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.

Brian began his career in accounting and has been a CPA since 1986. He is the owner of Bauer Evans, Inc. P.S., a CPA firm. In 1999, he founded Madrona Financial Services, LLC, a Registered Investment Advisory firm that offers comprehensive financial planning services, as later founded Madrona Insurance Services, LLC. The group of companies employ over 30 people and manage over $800 million.

He hosts his weekly radio show, Growing Your Wealth, on KTTH 770 AM, KIRO 97.3 FM and KVI 570 AM, and has original daily features on 4 of the top stations in the Seattle market. He has published books, multiple Kiplinger articles and is a national coach for Financial Independence Group.

Rob Harvey

Rob Harvey, an Austin-based Senior Investment Strategist and Vice President, serves as a subject matter expert for Dimensional's equity portfolios and performance. He joined Dimensional in 2016 as an Associate Portfolio Manager and has managed international, emerging markets, and domestic equity portfolios. Rob also worked in the firm's London office, managing international and global equity strategies within the Portfolio Management team.

Prior to joining Dimensional, Rob worked in the treasury department of Cisco Systems, trading foreign exchange, managing fixed income portfolios, and conducting the company's share repurchase program.

Rob earned his MBA from the Haas School of Business at the University of California, Berkeley. He received a bachelor of science in finance and international business and a bachelor of arts in German from Villanova University and is a CFA® charterholder.

Zac Delecki

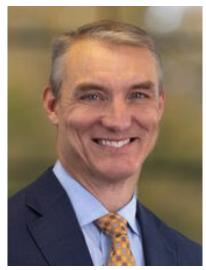
Zac Delecki is a Supervisory Special Agent with the Federal Bureau of Investigation (FBI) in Seattle. Zac joined the FBI in 2003. His career has taken him to several domestic field offices, two overseas postings and Cyber Division at FBI-HQ. Zac currently leads a team of investigators and analysts focused on national security related computer intrusions.

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.



David Tingstad

David C. Tingstad maintains an extensive practice in the areas of business and real estate matters, limited liability companies (LLCs), corporations and real estate. David regularly counsels clients in all aspects of business including operations, asset acquisitions, conversions and mergers. In addition, his practice includes assisting operating businesses with succession planning, financing, dissolution and disputes between owners. David's clients range from family businesses to renewable energy start-ups.

David joined the firm in 1995. Through his years of practice, David continues to be an active member of several committees advising on policy issues relating to business entity legislation. Specifically, David is a member of the Washington State Bar Association's Partnership Law Committee, which recently revised Washington's Limited Liability Company Statute. David is also a Member of the American Bar Association's Committee on LLCs, Partnerships and Unincorporated Entities.

David also regularly speaks to and engages with other legal professionals for continuing legal education. David has presented on a range of legal topics relating to business entity law, writes regularly on current legal topics through his blog, and authored a chapter for the pending Washington Partnership Deskbook through the Washington State Bar Association.

David lives in Edmonds and remains engaged in the community. David has coached baseball, basketball, and football through local non-profit organizations. Besides spending time with his family, as a former college football player, David enjoys fitness challenges including endurance events, and cycling.

Daniel Pedack

Daniel Pedack is an Insurance Specialist at Mountain Pacific Bank and our business affiliate, Mountain Pacific Insurance Services – serving in that capacity since 2021.

Daniel has steadily worked in the insurance industry garnering experience and exposure to multiple lines of coverage. Daniel earned a Master of Arts Degree from Western Governors University in Learning and Technology, and a Bachelor of Arts from Pacific Lutheran University. 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, Arizona, Hawaii, 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 demonstrated a strong passion and commitment to be involved in our community.