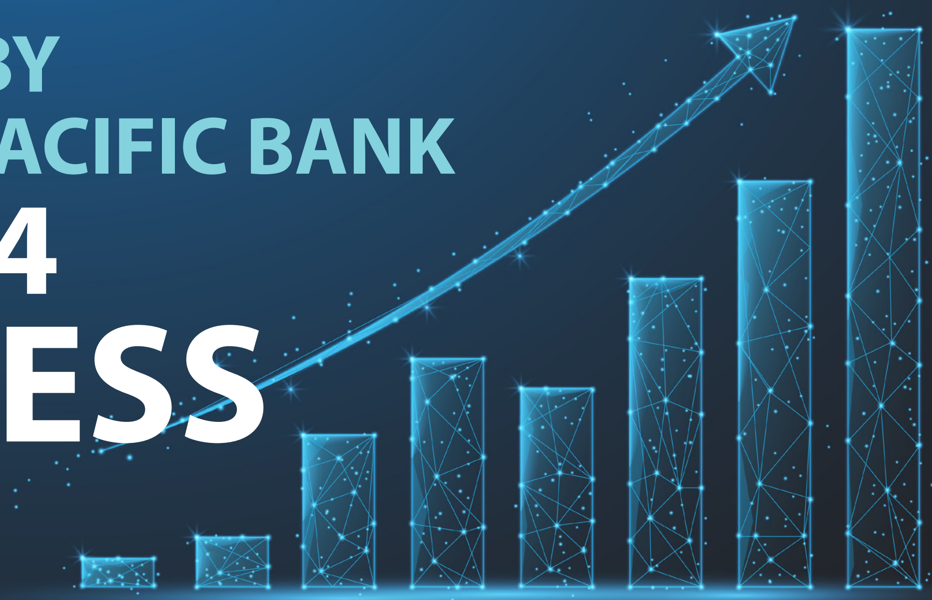
PRESENTED BY MOUNTAIN PACIFIC BANK

THE 2024 BUSINESS EXPO



Tuesday October 8, 8AM | Lynnwood Event Center

PLEASE JOIN US

Hear what's in store for 2025 and how it could impact your business and financial decisions. The day covers a diverse set of subjects including real estate, investments, tax planning, and cyber security.

8:00am
Registration opens, complimentary coffee and pastries

9:00am – 10:30am
Matthew Gardner, Real Estate Economist, Gardner Economics - Headwinds & Opportunities in 2025 Thoughts Regarding the Western Washington Economy & Ownership Housing Markets

10:30am – 11:15am
Brian Evans, CPA/PFS for Madrona Financial - 2024 Tax Advantaged Investment Strategies

11:15am – 11:30am Break

11:30am – 12:15pm
Shay Colson, Managing Partner, Intentional Cybersecurity - Moving Cybersecurity From Value Preservation to Value Creation: Lessons from $50B in Cyber Due Diligence

12:15pm – 1:00pm Lunch Break

1:00pm – 1:45pm
Weston Wellington, Vice President, Dimensional Funds Advisors - The Big Tease: When abruptly changing investment strategy may be hazardous to your wealth

1:45pm – 2:15pm
Willi Schatz CFP, AIF VP of Investments, Elliott Cove Capital Management - Small Business Retirement Plans and the New Secure Act 2.0: How this effects all plan sponsors and participants

2:15pm – 3:00pm
David Tingstad, Lawyer of Beresford Booth PLLC, - Recent Developments in Succession Planning: How Recent Court Rulings Impact Your Plan

3:00pm – 3:15pm
Raffle drawings and closing remarks

MOUNTAIN PACIFIC bank
Keeping it local

RSVP for this complimentary event by calling 425.263.3500

Matthew Gardner

Matthew Gardner is widely recognized as being one of the foremost real estate economists in the country and speaks to more than 75 groups per year where he offers his opinions regarding economic and housing markets condition.

In addition to his speaking engagements, Matthew sits on the Washington State Governors Council of Economic Advisors 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 Fannie Mae 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.

Recognitions that he has received include being chosen as the 2022 Partner of the Year by the Seattle-King County Realtors Association, and as the 2023 Partner of the Year by the Washington Realtors Association. He was also voted Industry MVP by the readers of the Seattle Agents Magazine.

Brian Evans

Brian Evans is a nationally recognized financial expert, author, and radio host. With decades of experience as a CPA and Personal Financial Specialist, Brian's insights have been featured on major networks like CNBC's Closing Bell and Fox Business Network. He marked a significant milestone in his career by ringing the bell to open the New York Stock Exchange in 2011.

Brian began his career in accounting, earning his CPA designation in 1986. He is the owner of Bauer Evans, Inc. P.S., a respected CPA firm in the Seattle area. In 1999, he founded Madrona Financial Services, LLC, a Registered Investment Advisory firm that provides comprehensive financial planning. This venture, along with Madrona Insurance Services, LLC, has grown into Madrona Financial & CPAs, a firm that employs over 30 professionals and manages more than $600 million in assets.

In addition to his advisory work, Brian hosts the Growing Your Wealth radio show, airing weekly across Washington (KIRO, KVI, KNWN, and KTTH) and Utah (KNRS). He is also an accomplished author with publications in Kiplinger and serves as a national coach for the Financial Independence Group.

Shay Colson

Shay Colson is Managing Partner for Intentional Cybersecurity. Shay has deep experience working with privately held financial services, healthcare, technology, and consumer products companies, and has conducted diligence work on more than $50B of private capital transactions.

He works regularly with privately held companies, investors, and their portfolio companies to identify cyber risk, develop strategic risk management capabilities, and use cybersecurity to support business growth and target valuations. His business-forward background enables companies to manage risk, drive growth, and strategically manage cyber risk in difficult threat environments.

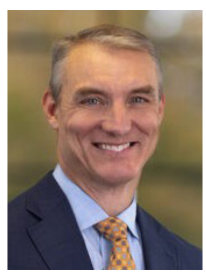
Weston Wellington

Weston Wellington, a Vice President with Dimensional, is one of the firm's market research experts. He works closely with financial advisors in the US, Canada, Europe, and Australia, showing them how a research-based "equilibrium" strategy may be a good way to pursue investment success and why their clients are unlikely to hear about this approach from the usual sources of financial advice. One of the firm's most engaging speakers, Weston also is an accomplished writer whose column, Down to the Wire, appears regularly on Dimensional's client website. Prior to joining Dimensional in 1995, Weston was director of research at LPL Financial Services, Inc. in Boston, and he has accumulated over 40 years of experience in the investment industry. He holds a BA in history from Yale University.

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.