Keynote Presentation

***"Where Do We Go From Here? A Discussion with Raymond James Chief Portfolio Strategist, Nick Lacy"* - Raymond James Asset Management**
Chief Portfolio Strategist, Nick Lacy, is a member of the Raymond James AMS Investment Committee and Investment Strategy Committee, which decide and drive the allocation recommendations for RJ managed portfolios. Nick will cover the recent market movement, what causes market movement and Raymond James' plan moving forward. He will also address commonly asked questions that have most likely crossed your mind.

Breakout Session Topics

***"2018 Outlook"* American Funds**
Get American Funds' perspective on the main themes of 2018: U.S. equity, International equity and emerging markets. As market levels call for balance and flexibility, learn about the importance of portfolio diversification, why there are reasons to be confident in the future, and the opportunities you may have to help meet your investing goals.

***"Avalon Waterways River Cruising"* Globus Vacations**
Explore what it's like to be on the rivers of Europe and see 2000 years of history pass you. Join Nancy Baumann from Globus Vacations to find out why Riverboat Cruising is the fastest growing segment of the travel industry and how you can be a part of it. Nancy has a true passion for the cruise and tour industry and will focus precisely on Avalon River Cruises.

***"Brainworks: Simple Solutions for Staying Sharp"* Janus Capital**
While cognitive decline may be an inevitable part of the aging process, studies show that we can prevent, or at least postpone its development through intervention. Learn about the critical components of brain health that provide a foundation for improved cognitive functioning. Also learn how to utilize the power of brain training to improve learning in areas that have the most significant impact on maintaining a strong, flexible mind.

***"Cyber Security"* Camera Corner Connecting Point**
In the age of the digital era, hear examples of common mistakes that are made online and learn the best practices for keeping yourself safe and protected from possible scams.

***"Guide to the Markets"* JP Morgan Asset Management**
Get insights on today's most critical economic and investment topics from Matt Moslander, V.P., J.P. Morgan Asset Management and Alex Dryden, associate on J.P. Morgan's Global Market Insights Strategy team. Matt and Alex will share their thoughts on the current economic landscape and outlook for 2018, discuss key drivers and trends taking place in the markets and answer any of your questions.

Breakout Session Topics

"Investing 101: A Fundamental Guide to Investment Concepts"
Frank Cape, Financial Advisor & Daniel Cape, Financial Advisor
Investing is a tool for building wealth, but it is not only for the wealthy. Frank and Daniel will cover the building blocks of investment concepts while providing insight into techniques to help you think about which investment strategies may be right for you.

"Legacy Planning & Trustees" **Fiduciary Partners Trust Company**
An estate plan can be as simple as having a will and naming a beneficiary for your 401k, or as complicated as having several trusts for different purposes in addition to your will. Ryan Valentine will cover trust basics (including wills vs. trusts), the relationship between trusts and legacy planning, the selection and duties of the trustee (during life and after one's lifetime) and trust investments.

"Long Term Care Planning & Estate Recovery Issues" **Attorney Dan Walsh**
This session will discuss the costs of long term care. We will analyze the requirements to qualify for Medical Assistance and the strategies used to become eligible for the program. Lastly, we will look at the rules for Wisconsin's Estate Recovery Program.

"Mathanomics" **Stadion Money Management**
Explore the relationship between market returns, account values and the potential risk behind your investments.

"My Loved One Just Died...What Do I Do" **Raymond James Trust**
The inevitable has happened and you are charged with settling your loved one's trust or estate. Learn the basic steps in developing a road map to carrying out their wishes.

"Retirement Planning 101: How to Plan for a Faraway Future"
Patrick Stoa, Financial Advisor & Andrew Froelich, Financial Advisor
Saving for retirement doesn't happen overnight. Learn how you can start putting the right pieces in place that will help you get to the retirement you want. Join Patrick and Andrew as they provide meaningful ways for getting your budding retirement plan off the ground.

"Social Security Benefits & Medicare" **Social Security Administration**
Nicole, a Technical Expert from the Green Bay Social Security office, will share detailed information about Social Security Retirement and Survivor benefits along with Medicare entitlement guidelines. Additional Social Security and Supplemental Security Income program information will be readily available.