

JOIN US FOR BREAKFAST OR LUNCH ON:

WEDNESDAY, JANUARY 23

11:00 A.M. - 1:00 P.M.

Corporate Alliance (San Diego)

9540 TOWNE CENTRE DR., SUITE 150
SAN DIEGO, CA 92121

*NEW ADDRESS

OR

THURSDAY, JANUARY 24

7:00 A.M. - 9:00 A.M.

The Crossings (Carlsbad)

5800 THE CROSSINGS DR.
CARLSBAD, CA 92008

MODERATOR:



R. J. Kelly

Founder and Chief Visionary Officer of Wealth Legacy Group®, Inc., a company specializing in the diverse needs of closely-held business and professional families. R. J. develops comprehensive plans that maximize investment growth, mitigate risk, create clarity in family legacy & issues of philanthropy, and facilitate business succession and exit strategies.



RSVP Required

(858) 569-0633

support@wealthlegacygroup.com



SPECIAL GUESTS:



Alan Nevin

DIRECTOR OF ECONOMIC AND MARKET RESEARCH
AT XPERA GROUP

The author of *The Great Divide: The True Story of America Tomorrow*, detailing America's demographic and economic trends, and where it is leading the country for the next 25 years. The book will be on sale at the event.



Greg Elias

CPA AND FOUNDING PARTNER AT THINK, LLP

Think, LLP is a national tax consulting firm. Greg has over 25 years experience in accounting, tax and business consulting, serving and advising Fortune 500 clients throughout the country. He focuses on income tax planning, and merger and acquisition consulting.



Lou Bojorquez

REGIONAL VICE PRESIDENT OF BEACON CAPITAL

Beacon Capital Management, Inc. is a next-generation registered investment advisory firm that offers long-term investors innovative portfolio management solutions that work to capture gains while striving to limit losses from today's market volatility.

*What You Need to Know to Grow
Your Business in 2019 & Beyond!*