WEALTH SUMMIT

FREE FOR A LIMITED TIME

CLAIM YOUR FREE PASS NOW

+ Elite money experts teach their strategies to grow, protect, and maximize your money.

Wealth Summit took place in September of 2017! Watch and learn how to slash taxes, grow your wealth, protect what you have, and retire financially confident.

Claim your **FREE TICKET** to the Wealth Summit for a limited time **(a $299 Value)**

Claim Your Free Ticket

OUR SPEAKERS ARE FEATURED IN

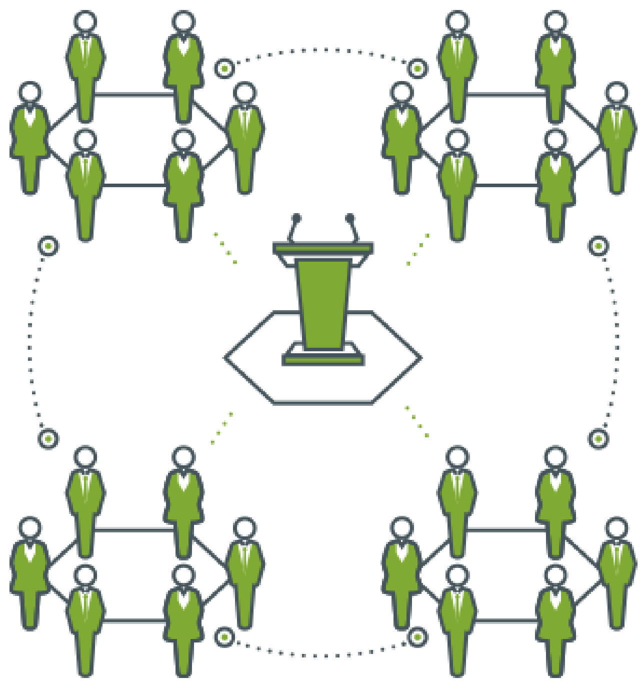
The Wealth Summits' Mission Statement is simple. *Our goal is to educate and empower investors with actionable tools, tips, and tactics to help them grow, protect, and maximize their personal wealth.*

HERE’S A SNEAK PEEK AT WHAT YOU’LL LEARN WHEN YOU CLAIM YOUR FREE TICKET TO THE WEALTH SUMMIT

Join 30+ “All-Star” national financial experts as they teach their favorite financial strategies and share industry secrets to maximize your wealth!

This isn’t your “run of the mill” seminar either, *this is the real deal!* The Summit is **jam-packed full of real-world actionable tactics** you’ll immediately be able to implement on your own! You’ll love the *pure education* this virtual summit will provide.

And it doesn’t matter whether you’re a money whiz or a financial novice. You’ll learn the same methods and strategies our professionals use for their clients, *and themselves!*



Just one single nugget of financial wisdom alone could be worth its weight in gold to you and your personal wealth. This Summit provides over 30 hours of professional knowledge! It’s like getting the cliff notes version of a masters in financial planning online. Grab your FREE TICKET today before we fill up!

HERE'S A SNEAK PEAK AT THE CUTTING EDGE FINANCIAL TIPS, TRICKS, AND TACTICS YOU'LL LEARN

How to **build a million dollar triple-tax-free retirement** using the medical IRA strategy

What's better for your IRA and 401k savings**? Tax-free Roth or pre-tax contributions?**

The **4 real factors** which drive your investment returns, *and how to maximize them*

How to **protect your nest egg** against catastrophic medical expenses in retirement

How to avoid investment scams, fraud, and losses from unscrupulous brokers (with real stories)

When you should buy (or run for cover) from those fancy annuities sold on TV

3 secrets to managing and minimizing **healthcare costs during retirement**

5 ways to create a rock solid budget, and why you may just need the "Anti-Budget" instead

Why inflation – *not bad markets* – is really your biggest enemy, and how to insulate yourself from it

How to dominate your golden years by doing a "retirement rehearsal"

Why most advisors do not act in a fiduciary capacity, and how you can find a true fiduciary advisor

and *much, much more!*

No One **Cares** More About Your **Money** Than You!

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The Summit is designed to help you maximize your personal wealth through great education from industry leading financial fiduciaries advisors.

Claim Your Free Ticket

THE WEALTH SUMMIT SPEAKER SCHEDULE

Day 1 – Friday, September 1st

Healthcare & Medical

Session Starts: 10AM PST | 1PM EST

3 Simple Ways To Manage Your Healthcare Costs During Retirement

An average couples healthcare costs during retirement are estimated to be more than $250,000, and many experts think even that estimate is conservative. David Armes, who formerly worked for Medicare, will share best practices to managing your healthcare costs during retirement, and minimizing their impact on your personal finances.

David Armes, CFP®, MBA

Dover Health Care Planning

Retirement Planning

Session Starts: 11AM PST | 2PM EST

The Retirement Rehearsal

$52.4 billion dollars of unused vacation pay is lost every year. What if you could use some of that money to improve your retirement outcomes? You can massively improve your retirement financial success by doing a “Retirement Rehearsal”. Avoid boredom, set yourself up to dominate retirement by taking a “dry run”!

Benjamin Brandt, CFP®, RICP®

Retirement Starts Today

Financial Planning

Session Starts: 12PM PST | 3PM EST

4 Steps To Building An Effective Household Financial System

We maintain our cars and our homes, we go to the dentist and the doctor for check ups, yet our finances tend to get little – if any – attention! Hui-chin is a specialist at creating checklists and systems to make managing your personal family finances fun and easy!

Hui-chin Chen, CFP®

Pavlov Financial Planning

Financial Planning

Session Starts: 1PM PST | 4PM EST

3 Tricks To Get The MAXIMUM Tax Benefits From Your Charitable Donations

It's great you're giving to your favorite charities, but what if you could give MORE over your lifetime without actually giving more? By using some strategic gifting methods, you can increase your lifetime donations, slash your taxes, and live inspired knowing you're leaving a bigger legacy. The government will get your money, or your charity will – it's your choice!

Garrett Prom, CFP®, CRPC®, EA

Prominent Financial Planning

ınvesting

Session Starts: 2PM PST | 5PM EST

Dimensions Of Investing Which Drive Returns: The 4 Factors You Need To Know

You've probably heard the phrase "buy and hold". Generally speaking, that's great advice! But have you ever thought to yourself "What exactly should I buy and hold?" The fact is there are 4 critical factors of investing which drive your results in large part. Rubin Miller is a Regional Director with Dimensional Fund Advisors. He'll explain in detail the four investment dynamics you really need to understand as an investor.

Rubin Miller

Dimensional Investing

Day 2 – Saturday, September 2nd

Tax Planning

Session Starts: 10AM PST | 1PM EST

3 Steps To Maximizing Tax Savings Using Roth IRA Conversions & Strategic Recharacterizations

Roth IRA's are AWESOME! But the fact is, you may not be getting as much as possible out of them. By strategically converting and recharacterizing your Roth accounts into buckets, you could save thousands of dollars in taxes! I'll explain the process and pitfalls to watch out for.

Greg Phelps, CFP®, CLU®, AIF®, AAMS®

Redrock Wealth Management

Retirement Planning

Session Starts: 11AM PST | 2PM EST

3 Things You Need To Know About Your 401k Plan

So you’ve got a great 401k plan at work, but have NO CLUE what to do with it? There are 3 critical things you must know to really maximize your retirement savings!

John Frisch, CPA/PFS, CFP®, AIF®, PPC™

Alliant Wealth Advisors

nvesting

Session Starts: 12PM PST | 3PM EST

Investing 8 Years Into A Bull Market

If you just had a million dollars drop into your lap, would you put it all into the market today? We’re 8 years into a bull market after all, and normally we have a bear market every 4 years or so. Michael will share his perspective and strategies for investing in this stock market.

Michael Garry, CFP®, JD/MBA

Yardley Wealth Management, LLC

Financial Planning

Session Starts: 1PM PST | 4PM EST

Why You Don’t Need a Budget (and what to do instead)

A family budget is perhaps the most overlooked part of anyone’s financial plan. It’s also the most important by many standards. The problem is budgeting is just plain BORING! Miguel shares why budgeting is important, but also why you may need the “Anti-Budget” instead!

Miguel Gomez, CFP®

Lauterbach Financial Advisors

Day 3 – Sunday, September 3rd

Risk Management

Session Starts: 10AM PST | 1PM EST

3 Ways To Protect Yourself From Creditors And Predators

Planning for the unexpected is part of building an impenetrable financial plan! How you hold and title your assets may determine how much financial exposure you have.

Asset protection trusts are a viable way to protect yourself from creditors and predators!

Thomas E. Greene III, Esq.

Liberty Street Advisory Group

Retirement Planning

Session Starts: 11AM PST | 2PM EST

7 Steps For Gen XY'ers To Dominate Their 401k Plan

Every financial expert will tell you to put money into your 401k plan at work. What they don't tell you is how, why, and when to make the absolute most out of your savings! Lauren is a 401k plan expert. She's helped thousands of people build a retirement nest egg with 7 simple strategies.

Lauren Haynes, CIMA, CFP®

Evolution Advisers

Investing

Session Starts: 12PM PST | 3PM EST

Socially Responsible Investing – How To Make A Positive Impact With Your Investments

In this day and age of pesticides in our food, inhumane treatment of animals, global warming, tobacco, drugs, and alcohol – it's natural for many investors to want to make a positive impact on the world through their investments! Bill Holliday is an expert on investing to make a positive difference in the world! He'll teach you how, why, and what to expect from a socially responsible investment portfolio.

Bill Holliday, CFP®

AIO Financial

Retirement Planning

Session Starts: 1PM PST | 4PM EST

3 Tricks To Master Your 3 Retirement Money Phases

Are you thinking about retiring? Already retired? In your late years of life? When it comes to income and investment planning, there are different phases of retirement. Different things you must focus on to be financially successful! Cheryl is an expert in retirement income planning. She'll teach you the different phases of retirement money and planning, and share actionable tips to help you live both a purposeful, and memorable retirement without worrying about money at any phase of life!

Cheryl Krueger, CFP®, FSA

Growing Fortunes

Day 4 – Monday, September 4th

Investing

Session Starts: 10AM PST | 1PM EST

3 Ways To Protect Your Money From Shady Brokers

Bernie Madoff stole over 20 BILLION dollars from his trusting clients. What's preventing YOU from falling prey to a similar scam? While not every broker is out to steal from you, many are simply unscrupulous. David Liebrader is an expert in bringing shady brokers to justice. He'll share some real life stories, and 3 things you can do to make sure you're not the next big victim!

David Liebrader, JD, Judge Pro Temp

Investment Loss

nsurance

;ession Starts: 11AM PST | 2PM EST

:ritical Components Of An Effective Long Term Care Strategy

The number one thing retirees worry about is running out of money. The second most common fear is catastrophic long term medical expenses. Mark Maurer is a premier expert in long term care insurance. He'll explain how long term care insurance works, what to look for in a policy, and how to reduce that massive risk to your retirement.

Mark Maurer, CFP®, MBA

LLIS Insurance Advisor

College Savings

Session Starts: 12PM PST | 3PM EST

Inside The 529 Plan: How To Select The Best College Savings Plan For Your Family

While many young families want to plan for their kids college expenses, most don't know how! Most college plans are sold with heft commissions built in. Debbie is an expert in college planning for young families. She'll share what to do, and what to avoid, to maximize the money your child can spend on higher education.

Deborah Meyer, CPA, CFP®

Worthy Nest

Investing

Session Starts: 1PM PST | 4PM EST

The Top 10 Life Insurance Mistakes You're Making And How To Fix Them

While a life insurance policy can serve as a valuable asset, I think it's safe to say most people hope they never have to use it. However, there are many ways to alternatively gain value from the policy even excluding the event of a death. Scott Witt, a fellow of the Society of actuaries and a rare fee-only insurance advisor, joins the Wealth Summit to outline 10 mistakes people make when dealing with life insurance.

Scott Witt, FSA, MAAA

Witt Actuarial Services, LLC

Day 5 – Tuesday, September 5th

Financial Planning

Session Starts: 10AM PST | 1PM EST

Let's Get Through Old Age Without Killing Each Other: The Boomer's Guide To Caring For Aging Parents

Caring for elderly parents is increasingly becoming a financial burden on today's retirees. It truly becomes an issue when young retirees are supposed to be enjoying retirement, yet find reasons to disagree over the potentially massive financials of caring for elderly parents. Scott is an expert on helping baby boomers care financially for their aging parents while maintaining a financial plan that works for them.

Scott Neal, CPA, CFP®

D. Scott Neal

Financial Planning

Session Starts: 11AM PST | 2PM EST

The Fiduciary Fuss: Finding The Best Financial Advice In A World Of Brokers Selling Products

According to Tony Robbins best selling book “Unshakable”, the majority of financial advisors do not act in a fiduciary capacity. Carlos is the Managing Director of the Center for Fiduciary Excellence, a worldwide organization which sets the dominant standards for financial advisors. He’ll share his insights on what exactly a fiduciary financial advisor is, and how to find one of those “elite” 2% Tony Robbins recommends you find to help you tackle your most precious financial goals and dreams.

Carlos Pankseep

Cefex

Retirement Planning

Session Starts: 12PM PST | 3PM EST

401k/IRA Alternatives For A Tax-Advantaged Retirement Plan

Your might not have known that your life insurance policy can double as life insurance and an investment tool for your retirement planning! Andrew Thomas, who directs investment product sales for TIAA, joins the Wealth Summit to discuss the Variable Universal Life insurance policy and how it can be used to accomplish both objectives.

Andrew Thomas, CLU®, ChFC®

TIAA

Retirement Planning

Session Starts: 1PM PST | 4PM EST

Roth IRAs Rock: Who, What, When, Why – and HOW

The Roth IRA concept was created by Senator William Roth in 1997. Very few people know or understand how revolutionary it is to your retirement plan. Use the Roth IRA for lifetime bequests to kids in high tax brackets! Use the Roth IRA for that extra retirement income when you're crossing an IRS tax bracket. The Roth IRA is incredibly powerful, and Johanna is an expert in Roth IRA's.

Johanna Fox Turner, CPA, CFP®, RLP®

Fox & Company Wealth Management

Retirement Planning

Session Starts: 2PM PST | 5PM EST

What is Asset-Liability Matching and Why is it a Good Approach for Retirement?

Asset-liability matching is an investment approach that pension plans have used for years. It's purpose is to match assets to the job they need to do – such as generate a reliable stream of cash flow for retirement. This presentation discusses what it is, how it works, and why it is a great approach to use for your retirement portfolio

Dana Anspach, CFP®, RMA®, Kolbe Certified Consultant®

Sensible Money, LLC

Day 6 – Wednesday, September 6th

Financial Planning

Session Starts: 10AM PST | 1PM EST

Planning For Your Last Hurrah: Why Funeral Planning Is Important For Everyone

Let's face it, we're all terminal from birth! It's only a matter of time before our family must deal with our own inevitability. Lauren is an expert on helping families plan and cope with the inevitable in the easiest way possible. It's no picnic, but it is a reality anyone who cares about their family must deal with.

Lauren Gadkowski Lindsay, CFP®

Personal Financial Advisors

:inancial Planning

Session Starts: 11AM PST | 2PM EST

3 Secrets To Eliminating Your Student Loan Debt

Student loan debt is topping the charts as America's biggest crisis for the millennial generation. More and more, graduates are struggling to survive under a crushing debt which is seemingly unforgivable. Jason is an expert in student loan debt, and he's agreed to share is most secretive tactics to avoid, delay, and erase your student loan debt.

Jason Hamilton, CFP®

KIS Financial Planning, LLC

Financial Planning

Session Starts: 12PM PST | 3PM EST

Financial Frenemies: How To Avoid The Top 6 Investment Mistakes

The world of finance is so incredibly complex, it's impossible to know how to do everything "perfect". Sometimes, it's just as important to know what NOT to do instead! Avoiding "sure-thing investments" and those who position themselves as your trusted allies and advisors *may be the most critical route to reaching your investing goals.*

Dan Solin

Sales Coach

Financial Planning

Session Starts: 1PM PST | 4PM EST

The ABC's of Home Equity Conversion Mortgages

With 10,000 baby boomers retiring each day, and most of them with underfunded retirement plans, the home equity conversion mortgage is quickly becoming the most popular way for them to actually enjoy retirement! But what you DON'T know, can indeed really hurt you! Don, a 17 year reverse mortgage veteran, explains what they are, how they work, and when they're appropriate for today's retirees.

Don Graves, RICP®, CRMS

HECM Institute for Housing Wealth Studies

Day 7 – Thursday, September 7th

Retirement Planning

Session Starts: 10AM PST | 1PM EST

Social Security Claiming: How To Maximize Your Benefits

Choosing the right way to claim Social Security can easily add tens of thousands – even HUNDREDS of thousands – to your retirement wealth. Marc Kiner is one of the country's premier Social Security experts, and he's going to share best practices for Social Security claiming strategies to help you maximize your return and minimize your chance of dying broke!

Marc Kiner, CPA, NSSA

Premier Social Security Consulting

Investing

Session Starts: 11AM PST | 2PM EST

Passive Investing

Ever wondered why active investing fails miserably? It's mostly because of the fees, and luck doesn't last!

Chris Tidmore, CFA and **Andrew J. Patterson, CFA**

Vanguard Senior Analysts

Retirement Planning

Session Starts: 12PM PST | 3PM EST

The Only Triple Tax-Free Way To Build A One Million Dollar Retirement Plan

You've no doubt heard of the 401k and IRA plan, have you heard of the "Medical IRA Retirement Plan"? Garrett is an expert in health savings accounts, and he'll teach his little known tactic to create a one million dollar triple tax free retirement plan! This talk along will put your 401k to shame!

Garrett Prom, CFP®, CRPC®

Prominent Financial Planning, LLC

;inancial Planning

;ession Starts: 1PM PST | 4PM EST

Life Settlements: How To Cash In On Your Old Life Insurance Policies

140 Billion dollars of life insurance policies lapse each year. If you've got life insurance, do you still need it? Mark is an expert on helping people cash in on their life insurance policies at above market prices. He'll teach you all about life settlements, and when you should consider cashing in.

Mark Mrky

Life Insurance Settlements, Inc.

MEET OUR ALL-STARS OF FINANCIAL PLANNING

e assembled an amazing group of fiduciary financial advisors and industry experts. Each will share their own secrets and strategies to help you master a specific area of your onal finances.

ite how busy they are running their day-to-day businesses, they've dedicated their own onal time to share their best tips and techniques! This IS NOT your "run-of-the-mill" sales pitch with a free dinner. These are world-class advisors dedicated to helping you achieve maximum wealth!

You're in for a real treat!

David Armes

Benjamin Brandt

Hui-chin Chen

Miguel Gomez

Cheryl Krueger

John Frisch

Michael Garry

Rubin Miller

Thomas E. Greene III

Lauren Haynes

Bill Holliday

Johanna Fox Turner

David Liebrader

Mark Maurer

Deborah Meyer

Dan Solin

Scott Neal

Carlos Pankseep

Garrett Prom

Jason Hamilton

Scott Witt

Lauren Gadkowski Lindsay

Mark Mrky

Marc Kiner

Don Graves

Andrew J. Patterson

Chris Tidmore

Dana Anspach

Greg Phelps

WHY YOU SHOULD CLAIM YOUR FREE TICKET NOW

Frankly, the real question is “Why wouldn’t you claim your free ticket now?”

Any single nugget of insight can save you time, money, and energy. Any little financial tidbit you glean may help you leave a legacy for your loved ones or charity, or even help you send the kids to a better college or make sure you have enough money to comfortably retire on!

So why wouldn’t you claim your free ticket today? And in case you want a few more reasons, just remember:

1

t's FREE! That's right, this is a FREE event (for a limited time)!

2

2 **It's CONVENIENT!** It can't get much more convenient than the ability to watch each session from the comfort of your couch with an iPad, phone, or computer.

3

t’s EDUCATIONAL! Each speaker has agreed to provide amazingly valuable and actionable nformation WITHOUT A SALES PITCH!

Again, it’s like getting the cliff notes version of a masters in financial planning!

No One **Cares** More About Your **Money** Than You!

The **Wealth Summit** is an online financial education event. There is no hype, no fluff, and no sales pitch!

The Summit is designed to help you maximize your personal wealth through great education from industry leading financial fiduciaries and advisors.

Claim Your Free Ticket

THIS ISN’T YOUR TYPICAL FINANCIAL SEMINAR WITH BAD FOOD AND AN OBNOXIOUS SALES PITCH!

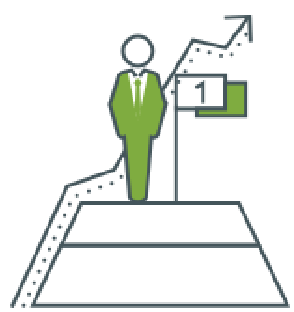
probably expect a sales pitch or some other “catch”. Let me break this down for you nple terms.

1

1 If you have internet, you can watch from anywhere! You don’t need to fly or drive to a hotel, paying for a room and meals. This is 100% virtual! Watch from your couch, or by the pool with an ice cold beverage!

2

Watch when you want! All sessions will be presented throughout the week of September 1st. During the free portion of the Summit, you can watch and replay each session as many times as you like within 48 hours from its scheduled time. Can't watch all the sessions you want within 48 hours? No worries! Just grab the Wealth Summit "All Access Pass" and own the content forever!



3

These speakers are amazing! You won't find a list of speakers like this anywhere. Each one of these speakers is highly successful in their own practice niche, and most of them don't typically do events like these. You're in a position to roll up your sleeves and maximize your wealth using the same insight some of the nation's leading financial fiduciaries and industry experts use.

3

4

You can be a money geek or financial novice and you’ll still learn tricks to improve your financial planning. These speakers and their topics aren’t designed for Wall Street Insiders, they’re designed for you! The typical person who really needs and wants help in making the most of the wealth they have.

STILL HAVE QUESTIONS?

I would too. It really does sound too good to be true I’ll admit. In the interest of full disclosure, here are the most common questions we get.

- Is it really FREE?
- Is it really EDUCATIONAL?

What if I buy an “All Access Pass” and want my money back?

MEET YOUR HOST

EG PHELPS

CFP®, CLU®, AIF®, AAMS®

Greg himself is an accomplished CEFEX certified fiduciary financial advisor, speaker, author, and most importantly loving husband and father of twin 14 year old boys. Greg has helped thousands of people achieve and master their own retirement wealth over the last two decades plus!

“Friends, clients, and colleagues have asked me why I’m creating this Summit. It’s simple really, I LOVE educating people! I want to help them avoid the critically painful mistakes I’ve seen throughout the years, and honestly maximize and protect their personal wealth. Doing this one client at a time has been great for the last 20+ years, but I want to leave a larger – more positive – impact on the world. It’s time to use technology and think bigger!”

Through his 20+ years of contacts in the financial industry, Greg has been able to pull together this All-Star cast of amazing speakers and educators. If one person gets one critical piece of information that saves them from making a big mistake, or helps them boost their finances to the next level, this will all have been worth it!

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