COTO DE CAZA RESIDENT & HOST OF MARKET WRAP

MOE ANSARI

GIVES MARKET OULOOK SEMINAR

JULY 23, 2022

LEARN IDEAS TO NAVIGATE A VOLATILE MARKET & MANAGE YOUR WEALTH

In-Person Market Outlook Seminar Orange County

Join **Moe Ansari** as he gives a ONE DAY seminar on investing in 2022.

Learn from the host of the nationally renowned **Market Wrap with Moe** radio broadcast and Chief Investment Officer of Orange County's Compak Asset Management as he discusses stocks, bonds, inflation, and global impacts to an already volatile market.

Hear Wealth Planning Strategies

This seminar focuses on how you may optimize your wealth and enhance your life experience. This informational and interactive seminar introduces you to concepts and strategies that may help you manage your investments, taxes, estate, and risks.

What's more, it will discuss how you can assess your current financial situation and develop a personalized plan that may help you pursue your life and financial goals.

This program focuses on important financial issues such as:

- Money Printing
- Inflation
- Low Interest Rates
- High Stock Market Valuations
- Rising Estate Taxes

LIMITED SEATING!

JUNE 23, 2022
9:30 AM
to
1:00 PM

BRUNCH WILL BE SERVED AT COTO DE CAZA CLUBHOUSE

REGISTER NOW!*

IN-PERSON MARKET OUTLOOK SEMINAR IN ORANGE COUNTY

COMPAK ASSET MANAGEMENT
1801 Dove Street
Newport Beach, CA 92660
(800) 388-9700

www.compak.com

*There is no cost for this event

SEMINAR TOPICS

During this seminar, the following topics will be discussed:

- The process of wealth creation, preservation, and growth
- Optimizing wealth and happiness
- Forecasting inflation, economic growth, interest rates, housing prices, and equity markets
- Understanding the effects of global events such as the Russia-Ukraine conflict
- Determining how much money you'll need to retire
- Potentially reducing your estate taxes and transferring your estate to the loved ones and charities of your choice
- Understanding sound investment strategies and alternatives

EASY REGISTRATION (NO COST FOR REGISTRATION)

Online: www.compak.com/seminars

By Email: investments@compak.com

Website: www.Compak.com

ABOUT MOE

Moe Ansari is the President, Chief Investment Officer, and founder of Compak Asset Management. With over 35 years of investment experience, Moe evaluates the markets using industry-leading technical and fundamental analysis. His tenure in the financial markets has given him the background and instinct required to understand the global marketplace and its intricate inter- linkages. His professional experience includes options trading, portfolio optimization, futures trading, mutual fund selection modeling and financial risk management. He is a nationally sought speaker and has conducted numerous financial seminars since the 1980s.

Moe Ansari began his broadcasting career in 1988. Since then, he has developed into a seasoned radio personality by interpreting the news and providing expert financial analysis. His Market Wrap broadcast focuses on the day's news from Wall Street and around the world.

COURSE OBJECTIVES

This Wealth Management Course aims to integrate behavioral finance, psychology, personal financial planning, risk management, and asset management to provide participants with the theoretical and practical knowledge to effectively build and manage wealth.

This program will take a multidisciplinary and practical approach to teach how an individual or family can optimize their life choices and financial decision making.

COURSE OBJECTIVES:

- Gain an understanding of the wealth management process
- Become aware of global, political, financial, and economic developments and their impact on wealth management and asset allocation strategies
- Understand different wealth management tools, products, and solutions and their appropriate use to achieve a life or financial goal
- Recognize the relationship of money and happiness and how to maximize life satisfaction
- Be able to create a “financially feasible and emotionally viable” long-term wealth management strategy

Optional Retirement Planning Consultation

After the seminar, you will have the opportunity to meet privately with your presenter. During this meeting, you can ask specific questions regarding your financial goals.

with Feroz Ansari

Adjunct Professor of Wealth Management
University of California Irvine - The Paul Merage School of Business

Feroz Ansari is a Senior Principal and Portfolio Manager. He is a CFP® (Certified Financial Planner™) certificant. He holds an MIM (Masters of International Management) degree from ASU – Thunderbird, Graduate School of International Management, Arizona, and an MBA from the Institute of Business Administration, Karachi, Pakistan.

He has completed risk management, trading, portfolio management, leadership and financial management programs at The Oxford University in England, INSEAD in France, Citibank Training Center-Singapore, Euromoney in New York and Emirates Bank Training Center in Dubai. Feroz Ansari published a research paper dealing with dual exchange rate mechanisms and has conducted training programs for treasury management and foreign exchange.

Prior to joining Compak, Feroz worked in banking and treasury management. He held positions at Banque Indosuez, Faysal Bank and Emirates Bank International. Feroz has over 22 years of experience in banking, treasury management, asset allocation and asset management. He started his career in 1993 as a Treasury Associate at Banque Indosuez and held the Position of Treasurer, Head of Treasury & Corporate Banking and Deputy General Manager at Emirates Bank.

Feroz has also been selected to serve on the Client Advisory Council of Wealth Advisor Services at Fidelity Investment Institutional Service Company. He is also active in the local community. He serves on the Board of Advisors of University of California-Irvine's Center for Investment and Wealth Management (CIWM). At CIWM he serves on numerous "Financial Literacy" sub-committees.

Contact Feroz Ansari

FAnsari@Compak.com
(800) 388-9700

1801 Dove Street
Newport Beach, CA 92660

Market Wrap Host
Moe Ansari Leads
Market Outlook Seminar
Learn Ideas to Navigate a Volatile Market

This seminar discusses strategies that may help you:

- Manage your wealth more efficiently and productively
- Take advantage of recent tax law changes
- Choose investments that match your risk tolerance and life goals
- Enhance your life experience by increasing your knowledge of global mega-trends and your own self
- Create a family environment that focuses on growth, positivity, wealth creation, and wealth preservation

There is no assurance provided that the financial concepts and strategies discussed will provide investment success.

Compak Asset Management offers investment advice only after entering into an investment advisory agreement and gathering client-specific information about goals, objectives, financial status, and risk tolerance. . Investments are subject to market fluctuations, risks and potential loss. Actual results depend on many factors as discussed in the seminar.

We make no assurance that past performance or the use of technical analysis will accurately predict future prices. Further, a risk of technical analysis is that over-focus on historical patterns could lead to ignoring or down-playing security-specific concerns, overall market or sector concerns, or other factors, because we assume inaccurately the historical patterns will repeat themselves. In no event is past performance a guarantee of future performance.