COMPAK ASSET MANAGEMENT CIO AND HOST OF MARKET WRAP

MOE ANSARI

GIVES MARKET OULOOK SEMINAR

SEPTEMBER 27, 2022

LEARN IDEAS TO NAVIGATE A VOLATILE MARKET & MANAGE YOUR WEALTH

In-Person Market Outlook Seminar San Jose, CA

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!

SEPTEMBER 27, 2022
11:30 AM
to
2:00 PM

LOCATION:

SAN JOSE, CA

REGISTER NOW!*

IN-PERSON MARKET OUTLOOK SEMINAR IN SAN JOSE, CA

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.

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