16th Investors Forum

March 22nd, 2022

Recap

140 clients and guests gathered at Michael's on East on Tuesday March 22nd for our 16th Annual Investors Forum. It was wonderful to host an in person event. We all enjoyed the speakers, the food and being together again.

We discussed where we have been the past two years and where we think we are going in the future. Jeffrey Spiegel, Director, US head of iShares Megatrend Blackrock, was our keynote speaker. His topic was "Megatrends Own the Future." The five major trends are Demographics and Global Change, Climate Change and Resource Scarcity, Rapid Urbanization, Technological Breakthrough and Changing Economic Power. Jeff, himself a Millennial, focused on technology, demographics and global change and how it is impacting the future.

Our distinguished panel was led by Dan Sullivan, J. P. Morgan, and included Otis Greene with Blackrock, John Gunther with Polen Capital and Tom Connors with Lazard. Their topic was "The Economy, the Markets, Covid and Ukraine. Where are we now and where are we going? How to Invest in this Environment." Discussion of the stock market, bond market, Federal Reserve and the economy was robust and interesting. Please call for an update if you were unable to attend.

Our entire team, Annette Celentano (Portfolio Associate), Xochitl Napoles (Client Service Associate), Thomas Urfer and Judith Schwartzbaum appreciate all of you. We host our Annual Investors Forum to keep you up to date on what's important to the economy and the markets.

We look forward to meeting with you and reviewing your portfolio to make sure it is still aligned with your financial goals. Call our office at 941-364-7444 to schedule your appointment.

Judith Schwartzbaum
Senior Vice President - Wealth Management
Financial Advisor
Senior Investment Management Consultant
Financial Planning Specialist
Portfolio Management Director
Alternative Investments Director

Thomas Urfer CFP®
First Vice President - Wealth Management
Financial Advisor
Family Wealth Advisor
Senior Portfolio Manager
Alternative Investments Director

Morgan Stanley Wealth Management
The Schwartzbaum Urfer Group
2 N Tamiami Trail STE 1100
Sarasota, FL 34236
Tel. 941-364-7444

Dan Sullivan JP Morgan, John Gunther Polen Capital, Otis Green Blackrock, Tom Connors Lazard Asset Management

[System will insert CRC number here]