

## Wells Fargo Advisors



### **Business Owners Lunch with Leo Robinson**

**Tuesday, September 10<sup>th</sup>, 2024 from 12:00 PM – 2:00 PM**

Enjoy an educational lunch with the Robinson Financial Group of Wells Fargo Advisors. We will have Meredith Fiocchi in attendance to discuss the benefits that Business Owners can gain from using ESOPs as an exit strategy. Seth Clemmer, Lead Business Growth Strategy Consultant at Wells Fargo Advisors will be in attendance to discuss cash management strategies for business owners.

#### **The Palm Restaurant**

Tuesday, September 10<sup>th</sup>, 2024 from 12:00 PM – 2:00 PM  
1 International Place, Boston, MA 02110

Lunch will be served and there is convenient parking nearby at the 125 High Street Garage (entrance next to the fire station).

RSVP to Patrick Kelley – Financial Advisor at **(617) 854 – 1901** or **[patrick.kelley@wellsfargoadvisors.com](mailto:patrick.kelley@wellsfargoadvisors.com)**

#### **Guest Speakers**

**Meredith Fiocchi** – Associate Vice President – Investments at Fiocchi McCarthy ESOP Group of Wells Fargo Advisors

**Seth Clemmer** – Lead Business Growth Strategy Consultant at Wells Fargo Advisors

**Jon Haspel** – Vice President – Structured Investments & Target Outcome ETFs at First Trust Portfolios

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## **The Robinson Financial Group of Wells Fargo Advisors**

**Leo Robinson, CEPA®** – Managing Director – Investments, Financial Advisor

**Jason Schott** – First Vice President – Investment Officer

**Patrick Kelley, CEPA®** – Financial Advisor

This seminar is supported and financially sponsored by First Trust Portfolios.

The opinions of any of our guest speakers are their own and do not necessarily reflect the opinions of Wells Fargo Advisors. This event is educational in nature. No specific products will be discussed.

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