



Our Financial Conference

Conference Agenda
April 7, 2023

- 8:00 – 8:30 am **Doors Open for Participant Check-in at West Entrance and Vendor Visits (West Entrance and Silver Room)**
Check in, Get your Swag Bag, Grab a Coffee and a Snack, Begin Visiting Vendors, and Find a Seat.
**If space permits, walk-in registration will be taken after registered guests are seated
- 8:30 – 9:30 am **General Session – Welcome, Introduction to Conference, and a Little Inspiration to Start the Day (Main Event Room)**
- Karen Richel, University of Idaho Extension
 - Marlys Wilson, Former President of Latah Credit Union
- 9:30 – 9:40 am **Visit Vendor Booths on Your Way to Breakout #1 (West Entrance and Silver Room)**
- 9:40 – 10:40 am **Breakout #1**
- I'm 75, How Do I Take Care of My Financial Future? Panel **(Centennial Room)**
- Bruce Longmeier, Northwest Planning Inc.
 - Dustin Allbery, Northwest Planning Inc.
 - Ross Anderson, Peak Elder Law
 - Rhonda Comstock, AARP
- Working Parent Resources Panel **(Gold Room)**
- Casey Holcomb-Hawkes, Washington Trust Bank
 - Dulce Kersting-Lark, Community Childcare Advocate
 - Nick Thiros, Ideal – Idaho College Savings Program
- Investing Hands-On Workshop **(Main Event Room)**
- Luke Erickson, University of Idaho Extension
 - Chris Morin, Idaho Central Credit Union
 - Kaitie Jones, Northstar Financial Management, Inc.
 - Mark Mooring, Northstar Financial Management, Inc.
- 10:40 – 11:10 am 30 Minutes of **"Quality" Vendor Time** on Your Way to Breakout #2 **(West Entrance and Silver Room)**
- 11:10 – 12:10 pm **Breakout #2**
- Business Start-Ups 101 Panel **(Centennial Room)**
- Kyle Guelcher, Idaho Small Business Development Center at Lewis-Clark State College
 - Fran McCully, McCully Bookkeeping and Consulting
- Interactive Budgeting Simulation...Plus **(Gold Room)**
- Karen Richel, University of Idaho Extension

What is Happening with the Housing Market? Panel (**Main Event Room**)

- Misty Curry, Latah Realty
- Dave Clark, Columbia Bank
- Tim Kinkeade, Novus Home Mortgage

12:10 – 12:30 pm

More Vendor Booth Time and Lunch Pick-up – This is a great time to visit the vendors as the hotel and sponsors set up for lunch. Please come to the Vendor Area and we will announce when it is time to go back into the Convention Center for lunch. (**West Entrance and Silver Room**)

12:30 – 1:30 pm

Lunch with a Sponsor! Have a burning question that only a financial planner can answer? Or maybe a credit union or lawyer? Our sponsors are treating you to lunch along with some great FREE quality time with them to ask any question you want. Come and enjoy Lunch with a Sponsor. (**Main Event Room**)

1:30 – 1:45 pm

Last Chance with the Vendors – Our Vendor Booths will be Leaving Soon – Stop on Your Way to Breakout #3 (**West Entrance and Silver Room**)

1:45 – 2:45 pm

Breakout #3

Retirement Readiness for All Ages Interview (**Centennial Room**)

- Justin Swift, Northwestern Mutual – Trail and Swift

Finding Financial Professionals Class (**Gold Room**)

- Luke Erickson, University of Idaho Extension

I've Been Asked to be an Executor...Now What? Interview (**Main Event Room**)

- Ellis Eifert, Eifert Law Firm
- Aaron Roepke, Westberg Roepke Moore PLLC

2:45 – 2:55 pm

Walk Back to General Session

2:55 – 3:30 pm

Don't Leave Yet... **Final Comments and Door Prizes!** Please come join us!
You are not going to want to miss the final door prizes. (**Main Event Room**)

Please do not forget to **Complete Your Survey** (paper or QR Code) and pick up your door prizes at the Registration Desk.

Thank you so much for being a part of this amazing conference! Can we count on you next year?

**Mark Your Calendar for April 5, 2024... It will be Our "Golden" Birthday... 5th Conference on the 5th of April!
Have an Incredible Year!!! Call on all of Your Great New Resources!
AND Don't Forget to Watch for Our New Logo!!!**



Bringing you &
local financial
resources together