



# Upcoming Workshops

June 10, 2023

## **Essential Elements of a Financial Plan (Registration Open)**

Hosted by: Rodney Ownby, CFP®,  
AIF®, CPA & Dave Balakrishnan, MBA

August 12, 2023

## **Late Stage College Planning (Registration open in May)**

Hosted By: Dave Balakrishnan, MBA

October 7, 2023

## **All about Mutual Funds and ETF's (Registration open in July)**

Hosted By: Rodney Ownby, CFP®,  
AIF®, CPA, Charles Curry, CFP®, AIF®,  
MBA, Dave Balakrishnan, MBA



**SCAN TO SIGN UP**