

The Balance Sheet

Retirement Planning & Investing

DEAN LISTLE & TYLER LISTLE



Dean Listle, Investment Advisor Representative

Speaker Bio's

There's a chance that some of you will know Dean because he grew up in Ashwaubenon then moved to West De Pere where he graduated from high school. Dean is a graduate of UW Madison and lives in New London with his wife, Kathy, and two sons Tyler and Luke. Dean's background is in business budgeting as well as cash flow, revenue and expense management.

Dean Listle, a member of the Secure Retirement Solutions Team, is an Investment Advisory Representative that is prepared to assist you with managing your investment holdings portfolios. Staying true to our vision – Client-focused, personalized solutions designed

to meet pre-retirement and retirement financial goals, the investment process is no different. Understanding no two investors are alike, advice and recommendations are tailored to your investment goals, desired return objectives, risk tolerance, time horizon, cash requirements and tax situation. In the end, each investment solution will be designed based on your long-term goals of preserving principal, maximizing income or/and accumulating wealth.

Tyler, who was on the Dean's list for five semesters, is a graduate of St. Norbert's College with a bachelor's degree in Business Administration with a concentration in Finance.

Tyler currently holds a Series 6 (Investment Company and Variable Contract) and Series 63 (Uniform Securities Agent State Law) licenses which allow him to service 529 college savings plans, mutual fund accounts, and variable annuity contracts.



Tyler Listle, Registered Representative

Agenda for the Evening

5:30—6:10 Dinner

6:10—7:00 Presentation

Meeting Details

Date: Wednesday, Feb 15, 2017

Dinner Location: Mackinaw's, 2925 Voyager Drive, Green Bay (5:00 PM)

CPE Credits: 1

Price: \$25—Members/Guests, \$10—Students

Menu: Almond Amaretto Chicken, 8 oz Angus beef filet of sirloin, Chimichanga

Deadline: Monday, Feb 13, 2017 at 12:00 PM

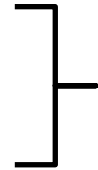
Registration Link: <https://www.eventbrite.com/e/imapackerland-dinner-meeting-february-2017-tickets-31417138507>



The Association of Accountants and Financial Professionals in Business

Upcoming Webinars

Free to IMA members and eligible for CPE credit



Webinar Schedule

Better You, Better Leader

Leadership Academy

February 07, 2017 01:00 PM - 02:30 PM

Drivers, Challenges, and Best Practices for Automating the Accounting Close

Inside Talk

February 15, 2017 01:00 PM - 02:00 PM

Register for these webinars online at

www.imanet.org/education-center/continuing-education/webinars

MEMBERSHIP ANNIVERSARIES

CONGRATS!

Congratulations to our chapter members with membership anniversaries this month!

David Nelson - 61 years

Diane Ford - 40 years

Randal Christl - 28 years

Raymond Suennen - 26 years

Amy Jepson - 24 years

Kurt Gresens - 21 years

Lorrie Jacobetti - 20 years

Maridey Diaz - 12 years

Brandy Younger - 9 years

Bonnie Nelsen - 8 years

John Jacques - 6 years

Amanda Le May - 1 year

Joseph Bruette - 1 year

** Watch for information on our membership recognition night coming at our March meeting. **

From the Office of Our President



Hi All,

Even though Mother Nature didn't give us the best weather for our January meeting, Chris Schmidt, Dan Ehr, and Brian Bachman from Baker Tilly still made the night a big success. Thanks to their dedication, we heard an update on some of the changes that have happened over 2016 and others that could impact your business in the upcoming year. We appreciate the Baker Tilly team for the program and would like to thank them for coming.

Our next meeting is on Wednesday, February 15th and we are inviting all students to attend this very important topic "Retirement Planning & Investing." This program is not just for our students. This is a topic everyone can benefit from. Please join me at Mackinaw's for an informative night of how the market is trending and get insights into your financial future. I encourage all members to come welcome our students to the meeting as they prepare to join those of us who are already working in this changing economic environment.

See you there.

Bonnie Nelsen

President | IMA-Packerland Chapter

(920) 609-2367

bnelsen@new.rr.com

www.imapackerland.com



Trivia Question

According to Wikipedia, what was the average daily trading value of the New York Stock Exchange in 2013?

Bring your answer to the February meeting. You may be our lucky winner!

Address Changes

Current Members:

To report changes to your email address for our chapter communication, please contact Kathy Adams McIntosh at k.adams35@att.net.

** To report changes to your contact information for IMA National communications, please log into ima.net.org and change your profile directly. **

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Chapter Meetings—2016-2017 Schedule

<u>Day</u>	<u>Date</u>	<u>Time</u>	<u>Place</u>	<u>Topic</u>
Tuesday	9/20/16	4:30 PM	Hagemeister Park	Ethics
Wednesday	10/19/16	5:30 PM	The Woods	Student Night & Recruiter Panel
Tuesday	11/15/16	4:00 PM	Legends, De Pere	Information Management & Destruction (includes tour)
Tuesday	12/13/16	5:30 PM	TBD	No meeting
Tuesday	1/17/17	5:30 PM	1951	Revenue Recognition
Wednesday	2/15/17	5:30 PM	Mackinaws	Student Night & Retirement Planning/Investing
Tuesday	3/21/17	5:30 PM	River's Bend	Legal Insight
Tuesday	4/18/17	4:30 PM	St. Brendan's	Ethics
Tuesday	5/16/17	5:30 PM	1951	Titletown Redevelopment



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