

# **Assets Assets and Assets**

**by**

**Robert Barth, CFP and Earl Montgomery**

**Evergreen Financial Planning, Inc.**

## **Program:**

Are you achieving all the financial goals and objectives you've set for yourself?

Unfortunately for many people, the answer is no. Identifying your goals and designing strategies to meet those goals are key elements to the process. Asset allocation is an important part of the strategies. Our speakers will educate us about Asset Allocation.

All attendees will receive a complementary asset allocation model created by Evergreen's portfolio designer which can be used to help you review your investments, identify needs and evaluate options.

## **Speaker:**

Robert Barth, CFP, has a long and varied background in the field of financial planning and related areas. Earl Montgomery, an ISA member of 34 years and an engineer turned financial, will assist in the presentation adding the view of an engineer to the subject. Both speakers are associated with Evergreen Financial Planning, Inc.

## **Meeting Notes:**

Date: Wednesday, February 10, 1999.

Place: Fluor Daniel, Room CN-7 (37-7), 3353 Michelson Dr., Irvine.

Times: Social Hour – 5:00 PM

Technical Program – 5:45 PM

*(Complimentary hors d'oeuvres and no host bar)*

## **Sponsors for the Meeting:**

Becker Technical Sales

Blair Martin Company

K Tek

## **Education Seminar:**

**Microsoft CE** on Saturday, February 27<sup>th</sup>, 1999, 7:30 AM to 2:30 PM at Fluor Daniel Room CN-7.

Please see the Registration Flyer inside. For more information, contact John Gong at (310) 265-9532 or [jgong@thinkdo.com](mailto:jgong@thinkdo.com)

## **Upcoming Programs:**

Optical fibers

Getty Museum Tour and Picnic