



Globe Wealth
Management

Strategic Financial Planning

NEWS RELEASE

NOVEMBER 2017



Contact

GLOBE WEALTH MANAGEMENT

46 South Main Street - Suite 3

Concord, NH 03301

603-296-0063 | phone

603-296-0060 | fax

www.globewealth.com

Stacey L. Blodgett, CFP®

sblodgett@globewealth.com

Regina M. Kozsan, CFP®

rkozsan@globewealth.com

Stacey Blodgett Attends Cetera Financial Group's Wealth Management University

Semi-annual event serves as an intensive educational and networking opportunity for top advisors

CONCORD, NEW HAMPSHIRE – **Stacey Blodgett, CFP®** of **Globe Wealth Management** recently attended **Cetera Financial Group's Wealth Management University** in Austin, Texas with over 200 other attendees. This invitation-only conference, which attracts advisors associated with the retail investment advisory firms of Cetera Financial Group from across the United States, opened on Monday, October 16, 2017 with a welcome speech provided by Cetera Financial Group CEO Robert Moore. The remainder of the conference consisted of highly intensive training and professional engagement amongst advisors.

Wealth Management University provides experienced advisors with an opportunity to take a comprehensive learning approach to important subjects such as serving high-net-worth clients, working with business owners, acting as a fiduciary, implementing behavioral finance strategies and more.

Per usual, there were numerous designation and masters course offerings available to attendees. Cannon Financial Institute offered both its Certified Wealth Strategist designation along with its ***Certificate in Applied Behavioral Finance*** course led by Clark Brown. There was also a newly-offered masters course led by John Brown of Business Enterprise Institute titled *Business Owner Exit Planning*. For advisors who want to take a proactive approach to the fiduciary standard by implementing prudent compliance practices, the Accredited Investment Fiduciary® (AIF®) designation was also available.

“With the new fiduciary era that our industry is experiencing, it is critical that I continue to hone my expertise by engaging in events like Wealth Management University,” said Stacey. “Aside from participating in the multiple comprehensive educational workshops offered, I was able to network and exchange ideas with numerous industry peers. I look forward to integrating the components of the Advice Centric Experience into my practices and further advancing the financial goals of my clients.”

The program offered additional insights from some of the industry’s leading experts, such as:

- **David Richman, Director, Eaton Vance Advisor Institute**
“Capturing Today’s Referable Moments”
- **Tony Crescenzi, Portfolio Manager, EVP, Marketing Strategist, PIMCO**
“Perspectives on the Global Economy, US Fiscal and Fed Policy: Insights from PIMCO”
- **Sanford Leeds, Distinguished Sr. Lecturer, McCombs School of Business**
“Insights from the Fed and Markets”
- **Mark Quinn, Director of Regulatory Affairs, Cetera Financial Group**
“DOL Rule Impact”

Brad Best, Director of Advisor Education at Cetera Financial Group, says, *“We take immense pride in providing these types of learning and development experiences for our advisors. Our utmost priority is to ensure that our advisors are equipped with all of the necessary tools to thrive in the industry’s new fiduciary era. Wealth Management University consists of tested, proven ideas that not only offer an effective way to convey useful knowledge and meaningful advice to our advisors, but also empower them to create an advice-centric experience for their clients.”*

About Globe Wealth Management

“Shaping Your Financial World, Together.”

Globe Wealth Management is a financial services firm located in Concord, NH. The firm provides comprehensive wealth management, investment, insurance, retirement and estate planning services to individuals, families, estates and corporate clients. Firm partners include: Stacey Blodgett, CFP® and Regina Kozsan, CFP®. Globe Wealth Management is a registered branch location of Cetera Advisors, member FINRA/SIPC. The firm is located at 46 South Main Street – Suite 3, Concord, NH 03301. For more information, call 603-296-0063 or visit www.globewealth.com.

Securities and advisory services offered through Cetera Advisors LLC, member FINRA/SIPC.
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Richard Johnson, Director of Marketing and Business Development, Globe Wealth Management

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