

PRESENTATION DETAILS

Thursday April 4, 2019

Food & Drink
6:30 - 7:00 PM

Discussion & Networking
7:00 - 8:30 PM

Location
Newport Private Wealth
469 King St West, 4th Floor

YOUR HOSTS



Caitlin Chapman, CFA
Portfolio Manager
416.867.7534



Curtis Perks, CIM®
Associate Portfolio
Manager
416.867.8588



Michael Southern, CFA
Associate Portfolio
Manager
416.867.8592



Amélie Beauregard, CIM®
Associate Portfolio
Manager
416.867.8599



Matt Anderson
Associate
416.866.2277

GUEST SPEAKER



Lisa Petkovsek
Certified
Professional Coach
Career Balance Coaching



Our Money. Our Way.

PRACTICAL WEALTH ADVICE FOR MILLENNIALS

As millennials, we're dealing with different financial challenges than our parents. Skyrocketing housing costs. Navigating a career or developing a side hustle to create our own financial security. Enjoying life today without crippling ourselves with debt tomorrow. And feeling overwhelmed by information overload on the financial choices.

Join our *NextWave* team at Newport for a non-boring financial discussion.

- Learn the most effective ways to save, spend, borrow and invest.
- Find out how you compare to a study of Canadian Millennials' financial behaviour.
- Most of all, learn from your peers who are financial professionals.

NO JARGON. NO JUDGEMENT.

Our team will share their professional experience as well as their personal successes and failures.

The Newport team will be joined by **Lisa Petkovsek, Certified Professional Coach**, who will lead us all in a proven goal-setting formula to help you reach your goals – and gain the confidence you can achieve them.

Did you know that those who set written goals made twice the amount of money than those who didn't? Those who set written goals AND created a plan of action made 10 times more.*

NEXTWAVE SEMINARS

Newport Private Wealth's *NextWave* seminars prepare young professionals to become educated and better stewards of wealth. In addition to providing wealth management insights and strategies, networking is at the forefront of the events as attendees make connections and exchange ideas with like-minded peers.

PLEASE RSVP

Casual attire. Space is limited. Reply to:
nextwave@newportprivatewealth.ca or directly to one of our hosts.