

2023

2023 7Twelve® Conference

For Financial Advisors Salt Lake City, Utah Oct 26-27, 2023

Sponsored by Craig L. Israelsen, Ph.D. Designer of the 7Twelve® Portfolio

Conference co-sponsors: my529 and Lunt Capital Management, SLC Utah

Registration Fee: \$275* (reduced rate of \$75 for 7Twelve Partners)

** Each conference attendee receives the 2023 7Twelve Educational Powerpoint and the Excel-based 2023 Retirement Portfolio Analyzer spreadsheet (both normally priced at \$200 each).*

Send check to Craig Israelsen, 1320 East Hobble Creek Drive Springville, UT 84663
OR

Pay via PayPal by contacting Craig Israelsen at craig@7TwelvePortfolio.com

Thursday October 26, 2023 – Conference begins at 1:00 pm

1:00 – 3:30 Training led by Craig Israelsen - Tutorial in the use of the Retirement Portfolio Analyzer spreadsheet. **Please bring your laptop computer**

3:30 – 4:00 Salsa and chips bar

4:00 – 6:00 Additional training – Retirement Portfolio Analyzer spreadsheet

Dinner on your own or join a group for dinner in SLC. Those who wish to attend The Tabernacle Choir practice can do so between 7:30 – 9:30 pm. There is no charge to attend. The rehearsal is held in the Tabernacle on Oct 26.

Friday October 27, 2023 – Conference begins at 9:00 Concludes at 3:00 pm

9:00 – 11:00 Review of 7Twelve® Educational Powerpoint by Craig Israelsen

11:00 – 11:15 Break

11:15 – 11:45 Presentation by **Lunt Capital Management**

11:45 – 12:15 Presentation by **my529**

12:30 – 1:30 Lunch served in the meeting room

1:30 – 3:00 Open forum discussion to share ideas and best practices

Conference concludes

Conference location:

**my529 Office in the Gateway Mall
60 South 400 West Salt Lake City, Utah**

On-site contact: Katie Turner @ 801-815-4877 ktturner@my529.org

For parking directions click on link below:

<https://my529.org/wp-content/uploads/2022/10/GatewayParking.pdf>

Parking Guide for my529

Board of Regents Building at the Gateway

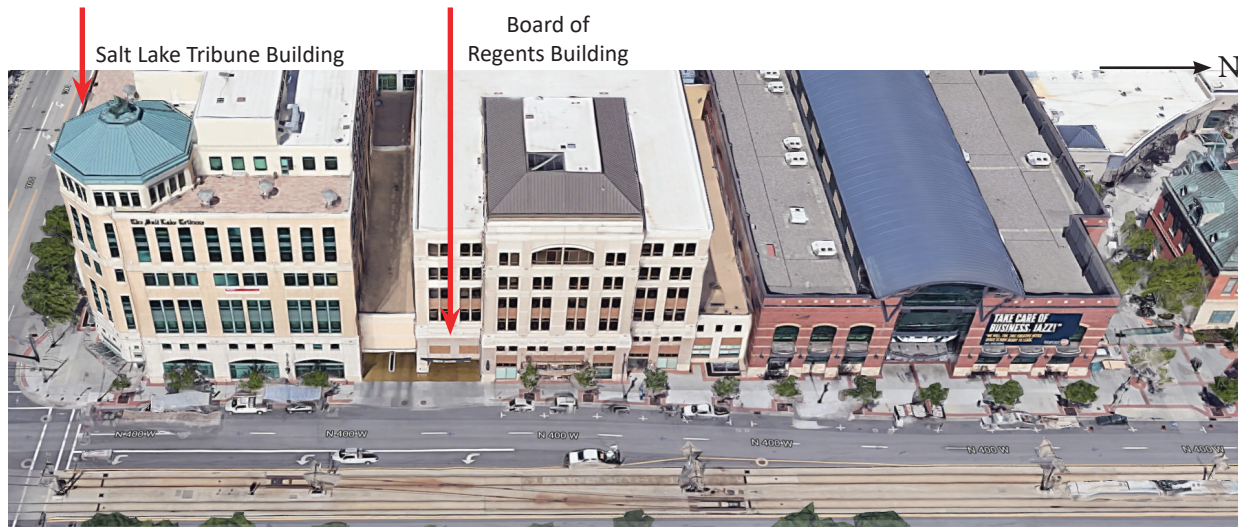
60 South 400 West, Salt Lake City, Utah 84101

Enter the North Parking Garage from 400 West at approximately 70 South – you will need to enter from the southbound side of the street due to the TRAX rails. Alternately, you may enter the garage from 100 South and approximately 430 West.

Take a ticket as you enter. The first hour of parking is free.
The receptionist can validate for visits over an hour.

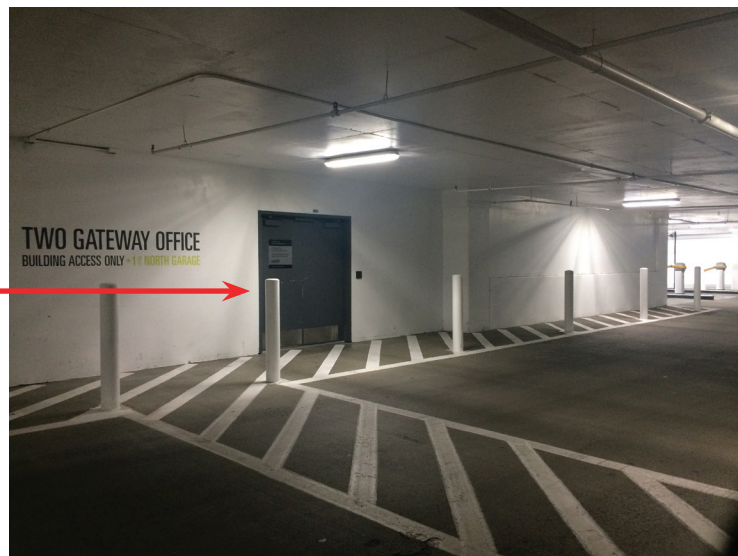
Enter Here
430 W. 100 S.

Enter Here
70 S. 400 W.



Park and proceed toward the northeast side of the garage to the Two Gateway Office elevator lobby. You will only be able to enter on P+1. The sign reads **Two Gateway Office. Building Access Only. +1 North Garage**. Walk straight ahead and check in with the receptionist in the lobby on level P+1.

Door to Board of
Regents Lobby
and my529
(On level P+1)



70 S. 400 W.
Entrance to
Parking Garage