

2011

# 7Twelve Conference

For Financial Advisors

Salt Lake City, Utah | October 20-21, 2011 | Sponsored by Craig L. Israelsen, Ph.D.

**Conference Registration Fee: \$65** (via PayPal or check) **\$85 after Sept 20**  
Register and pay by contacting Craig Israelsen at [craig@7TwelvePortfolio.com](mailto:craig@7TwelvePortfolio.com)

## Thursday October 20, 2011

1:00 – 3:15 **7Twelve** overview and training by **Craig Israelsen**  
Please bring your laptop computer. We will be using Excel.

**Salsa bar!** (back by popular demand)

3:45 – 4:45 **Andy Martin, President of 7Twelve Advisors LLC (Nashville, TN)**  
Andy will discuss the 7Twelve Balanced fund

5:00 – 6:00 **John Lunt, President of Lunt Capital Management (Salt Lake City, Utah)**  
John will discuss the strategic and tactical 7Twelve SMA and CIF

Dinner on your own or in groups

## Friday October 21, 2011

8:00 – 8:45 Ad hoc breakfast groups at the Hampton Inn

9:00 – 10:00 **Greg Moerchen, Owner of Qualified Plan in a Box**  
Greg will discuss 7Twelve applications in the qualified plan market

10:15 – 11:15 Advisor Forum  
Advisors will discuss how they utilize the 7Twelve in their practice

11:30 – 12:45 Lunch (hosted by National Association of Real Estate Investment Trusts, NAREIT)

12:00 – 12:45 Guest speaker: **Michael Grupe**, Executive Vice President, NAREIT

12:45 – 1:00 Closing remarks -- Craig Israelsen

*Conference concludes*

The conference is being held at the **Hampton Inn & Suites – Salt Lake City Airport**  
307 North Admiral Byrd Road  
Salt Lake City, Utah 801-519-6504

<http://hamptoninn.hilton.com/en/hp/hotels/index.jhtml?ctyhocn=SLCHSHX>

**Rooms at the Hampton Inn are available at a reduced rate.**

Please mention "7Twelve Conference" when booking your room (King Deluxe rate for \$109).  
A complimentary shuttle to/from the SLC airport to the Hampton Inn is available.

