13th Annual Client Appreciation and Wealth Management Conference

Helping to Build Your Future

September 26-27, 2019

SOLTIS
Investment Advisors

HOLMSTEAD RANCH
Central, Utah

Keynote Speaker

Max Boot
Historian, Best-Selling Author, Columnist and Foreign Policy & National Security Analyst

Max Boot is a historian, best-selling author, columnist, and national-security analyst who has been described by the International Institute for Strategic Studies as one of the "world's leading authorities on armed conflict." He is the Jeane J. Kirkpatrick Senior Fellow in National Security Studies at the Council on Foreign Relations, a columnist for The Washington Post, and a Global Affairs Analyst for CNN.

Max Boot's latest work of history, The Road Not Taken: Edward Lansdale and the American Tragedy in Vietnam (Norton/Liveright), was a New York Times bestseller and the 2019 finalist for the Pulitzer Prize in Biography. It was praised as an "epic and elegant biography" (The Wall Street Journal), "judicious and absorbing" (The New York Times), and "a superb scholarly achievement" (Foreign Policy).

Max Boot was also the author of another book released by Norton/Liveright in 2018—The Corrosion of Conservatism: Why I Left the Right—which was described as a "devastating dissection of conservatism's degeneracy in America" by Andrew Sullivan in New York magazine and as "soul-searching" and "refreshing" by The New York Times.

Max Boot is the author of three other widely acclaimed works of history: The Savage Wars of Peace: Small Wars and the Rise of American Power (2002), War Made New: Technology, Warfare, and the course of History, 1500 to Today (2006), and the New York Times best-seller Invisible Armies: The Epic History of Guerrilla Warfare from Ancient Times to the Present (2013).

Max Boot has advised military commanders in Iraq and Afghanistan, and his books have been assigned reading by the military services. Max Boot was a senior foreign policy adviser to the presidential campaigns of John McCain (2008), Mitt Romney (2012) and Marco Rubio (2016). Max Boot has been a columnist for Foreign Policy, a blogger for Commentary, a contributing editor to The Los Angeles Times, a member of the USA Today board of contributors, and a regular contributor to many other publications including The New York Times and The Wall Street Journal.

Max Boot graduated from the University of California, Berkeley (BA, history, 1991) and Yale University (MA, history, 1992). Born in Moscow, he grew up in Los Angeles and now lives in New York City.

Featured Speakers

Dean Allara

Dean Allara serves as Vice Chairman of Bridge Investment Group and head of the Capital Markets Group. He has experience in the real estate investment process including analyzing, raising capital, acquiring, financing, developing, managing, improving and selling properties beginning in 1986. Mr. Allara is responsible for capital raising, investment analysis, and investor relations. Allara is directly responsible for investing in over $4 billion in real estate assets. Property types include multi-family and single family residential, commercial, seniors housing, resort golf properties, hotel, and retail properties.

Mr. Allara earned his Bachelor of Science degree in Business Administration from the St. Mary's College in 1984, which included one year at Loyola University of Rome, Italy. He also earned his Master of Business Administration from Santa Clara University in 1986 with a semester at the Tokyo University studying Business Law.

Kim Anderson, AIF®

Kim Anderson, AIF® is a Managing Partner and President, CEO for Soltis Investment Advisors. Kim has been with Soltis since 1998. Kim began his career in the financial industry as a consultant with Prudential Insurance Company, licensed in company and individual pensions, mutual funds and insurance products.

Kim has spent most of his career in the development and services offered in the Retirement Plan Services Division. Kim has extensive experience in the consultation and the administration of retirement plans throughout the country. He is a member of the National Association of Plan Advisor's (NAPA) Government Affairs Committee with regular interface with government agencies and congress regarding issues related to retirement planning. He serves on the Fidelity Retirement Advisory Council and the Alliance Benefit Rocky Mountain Advisory Board. Kim received his B.S. degree in Economics from Brigham Young University. Kim has earned the Accredited Investment Fiduciary® professional designation from Fiduciary 360, Graduate School of Business, University of Pittsburgh.

Matt Brann, CFA®

Matt Brann, CFA® is the Managing Director of Strategic Partnerships for Soltis Investment Advisors. Prior to Soltis, Mr. Brann was the Chief Strategic Officer at SlateStone Wealth, based in Jupiter Florida where he was responsible for strategic growth and business development initiatives. He has also held senior leadership roles at Boston Private Wealth and Shamrock Asset Management. Mr. Brann began his career at Fidelity Investments where he worked in a variety of service, trading and business development leadership roles over a period of 11 years. Matt holds a Masters of Investment Management degree from Boston University and completed his Bachelor's degree at Brigham Young University. He is also a CFA Charter holder and a member of the CFA Society of Dallas.

Matt spends most of his free time with his family. Matt serves as the vice-chairman of the local Boy Scouts of America council. He also serves in a variety of volunteer positions at his church, and he and his wife volunteer as short term foster parents for high risk infants. Matt is also an amateur woodworker, a two-time Ironman triathlete and once rode a bull in a rodeo.

Featured Speakers

Dan DiDomenico

Dan is the President of Dakota and has been with the firm since 2008. In this role, Dan serves as a leader on the Dakota Sales Team promoting a culture of collaboration, accountability and transparency. Dan also serves as the investment specialist on the Edgewood Large Cap Growth strategy and has been active with Edgewood since 2008.

In addition to his leadership responsibilities, Dan is still a very active member of the sales and client service team with primary relationship responsibility for a group of institutional consultants, independent broker-dealers, banks and RIAs. Dan is also a member of the Dakota Investment Committee. He brings almost 20 years of industry experience to the firm.

Prior to Dan joining Dakota Funds Group, he held various positions, including Product Director, Investor Relations Director and Relationship Manager, with The Hartford, Penn Square Real Estate Group, and The Vanguard Group. Dan holds a bachelor's degree in Finance from Villanova University and is Series 6, 7, 63, and 65 licensed.

John Diehl, CFP®, CLU®, ChFC®

John Diehl, CFP®, CLU®, ChFC® is senior vice president of Strategic Markets for Hartford Funds. He and his team are responsible for engaging and educating financial advisors and their clients about current and emerging opportunities in the financial-services marketplace. These opportunities range from tactical strategies in areas such as retirement-income planning, investment planning, and charitable planning, to anticipating and preparing for long-term demographic and lifestyle changes. John also oversees Hartford Funds' relationship with the Massachusetts Institute of Technology AgeLab.

John attended Moravian College in Bethlehem, Pennsylvania, where he earned a bachelor's degree in economics. He has been a CERTIFIED FINANCIAL PLANNER™ (CFP®) since 1991. In addition, he holds the Chartered Financial Consultant (ChFC®) and Chartered Life Underwriter (CLU®) designations. He is also FINRA Series 6, 7, 63, and 26 registered and holds a life and variable insurance license.

Stan Ricks

Stan Ricks is the Director of Strategy and Investments at Debt Strategy. Stan has over 30 years of real estate development and investing experience. During his career, he has bought, sold, managed, leased, built and capitalized over $500 million in real estate ventures. He is formerly the CEO of Trophy Homes where he built over 2,000 homes during his tenure with the company. He is a current owner of and/or investor in office buildings, retail centers, mobile home parks, residential land, and multifamily properties. Additionally, he has been an early investor in a number of start-up companies such as Omniture, Zuka Juice and Altius Health Plan. Stan received his Bachelors in Estate and Financial Planning from Brigham Young University, where he taught from 2000 to 2011 as an adjunct professor teaching advanced real estate development and investing courses.

Featured Speakers

Lydia So, CFA®

Lydia So, CFA® is a Portfolio Manager at Matthews Asia and manages the firm's Asia Small Companies Strategy and co-manages the China Small Companies Strategy. Prior to joining Matthews Asia in 2004 as a Research Associate, Lydia was a Portfolio Associate at RCM Capital Management. She started her investment career at Kochis Fitz Wealth Management. Lydia received a B.A. in Economics from the University of California, Davis. She is fluent in Cantonese and conversational in Mandarin. Lydia has been a Portfolio Manager of the Matthews Asia Small Companies Fund since the Fund's inception in 2008 and of the China Small Companies Fund since 2019.

Clark Taylor, CFP®

Clark Taylor, CFP® is a Managing Partner over the Wealth Management division for Soltis Investment Advisors. Clark joined Soltis in 2003. Clark enjoys developing a professional relationship with each client and assisting them with their goals. He is a shareholder in the firm and also serves on the Board of Managers.

Clark has years of experience servicing corporate retirement plan clients, as well as individual wealth management relationships. Prior to joining Soltis, Clark spent three years working with Strong Financial Corporation, which at the time was one of the world's leading mutual fund families managing over $40 billion in assets. Clark is fluent in Spanish and has served a number of Spanish speaking clients.

In 2000, Clark graduated from Southern Utah University with a B.S. Degree in Finance. He is also a CFP® professional.

Bill Wallace, CFA®

Bill Wallace, CFA® is the Chief Investment Office for Soltis Investment Advisors. Bill is actively involved in developing and implementing investment strategies on behalf of Soltis' individual and institutional clients. Prior to joining Soltis in 2014, Bill was Senior Vice President and Regional Portfolio Manager at Key Private Bank. Bill's investment career spans 36 years where he managed investment portfolios for private clients, corporations, foundations and endowments. He has an extensive background in asset allocation decisions and is an expert in the various asset classes investors commonly use to meet their investment goals.

Bill earned both a Bachelor of Science in Economics and Master of Economics from the University of Utah. Bill also completed his CFA (Chartered Financial Analyst) designation in 1996 through the CFA Institute. In addition to being a CFA charterholder, Bill is past Chairman of the Utah Retirement System Board and continues to serve as a board member.

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