YOU ARE CORDIALLY INVITED

Insight and understanding for today's markets

Featured guest speaker:

Dr. Quincy Krosby
Chief Market Strategist,
Prudential Annuities

Hosted by:

Scott Livingston CFP®, CDFA
President
5 POINT Financial Group

With:
Michael Appleby
Regional Vice President
Prudential Annuities

Create confidence through preparation

- The global macro-economic and political landscape
- An analysis of monetary and fiscal policy in the U.S.
- The role of leading indicators in understanding market performance

GET TO KNOW MORE ABOUT DR. QUINCY KROSBY

Dr. Quincy Krosby is the Chief Market Strategist for Prudential Annuities. In this capacity, she is a member of the investment management group for the annuities division, where she provides perspective on the global macro-economic environment and financial markets. Previously, Dr. Krosby was the chief investment strategist for The Hartford, and global investment strategist for Deutsche Bank Asset Management. She also worked in the global markets groups at Credit Suisse and ING Barings.

Earlier in her career, Quincy Krosby was a U.S. diplomat, serving in Washington and United States embassies abroad, including a posting as Energy Attache at the U.S. Embassy in London. In addition to numerous assignments at the U.S. Department of State, she served as Assistant Secretary of Commerce, and represented the United States to the International Monetary Fund, positions which required confirmation by the United States Senate. Dr. Krosby studied at the London School of Economics, where she earned her master's and doctoral degrees. She is frequently quoted in the financial press and on business television.

Wednesday, March 20th | 7:30-9:00am
Country Inn Suites
19333 North Creek Parkway, Bothell 98011
Doors open at **7:00am** | Continental Breakfast

RSVP Now! ***Space is limited***
Angela Nguyen
Angela@5PointFinancial.com | 425.402.8700

We are asking attendees to consider a $10 tax deductible donation to the Marsha Rivkin Center for Ovarian Cancer Research located in Seattle, WA. The Rivkin Center funds global research towards preventing ovarian cancer and giving hope to thousands of wives, mothers, sisters and daughters.

5 POINT® FINANCIAL
Premier Financial Planning & Wealth Management

About Scott Livingston

Scott Livingston, CFP®, CDFA™
President of 5 POINT Financial

With over 20 years of experience in financial planning and wealth management, Scott Livingston empowers his clients to align their financial goals with their life aspirations and personal values. He specializes in retirement planning, investment management, insurance coverage, tax strategies, and estate planning.

Scott understands that everyone's economic and life situation is unique, and that helping others to define financial goals is the most critical step in the planning process. Through an extensive discovery process, Scott works closely with each client to prioritize their concerns and provide strategies to help them reach their financial goals both now and into the future.

"I operate under two guiding principles. First, develop a personal and high quality service model for my clients. Secondly, be independent in order to offer the best in class solution free of obligations to a specific company's products or services. At 5 POINT Financial we are interested in who you are, where you want to go, and finding ways to help you get there. Life is complex enough as it is, so let us help you get focused on meeting your financial goals."

Designations | Licensures

Securities licenses: Series 7, 24, 63 & 65
CFP®, Certified Financial Planner™
Life/Health Insurance underwriter
CDFA™ Certified Divorce Financial Analyst

Affiliations

Financial Planning Association since 1999
East King County Estate Planning Council since 2005
Greater Bothell Chamber of Commerce since 2010

Recognitions

5 STAR Wealth Manager, Best in Client Satisfaction, Seattle Magazine, 2007-2013 *
America's Top Financial Planners, Consumers' Research Council of America, since 2003**

Determined by independent research firm Crescendo Business Services in partnership with Seattle Magazine. Crescendo surveyed 41,000 high-net-worth residents and an additional 6,250 leaders of financial service industry companies. Recipients were asked to evaluate wealth mangers they knew through personal experience, based on 9 criteria: customer service, integrity, knowledge/expertise, communication, value for fee charged, meeting of financial objectives, post-sale service, quality of recommendations and overall satisfaction.* ***Scott is one of only 25 advisors out of 12,000 to receive this prestigious award seven years in a row.*
***The criteria used through independent evaluation included education, specialty training, continuing education, years in practice, certifications, and affiliations with professional association.*

CFP®

11830 NE 195th St | Bothell, WA 98011 | p: 425.402.8700 | www.5pointfinancial.com