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Title: **Economic Update and Market Outlook**

Presenter: Pete Deavan

Date: Wednesday, September 21, 2022

Time: 1:00 - 2:00 PM

Location: Bavaria Downs | 3919 Bavaria Rd, Chaska, MN 55318

CE Credits: This educational offering is APPROVED by the Minnesota Commissioner of Commerce as satisfying 1.0-hour of Standard classroom credit toward continuing insurance education requirements for each hour attended.
CFP: 1.0-hour Standard credit PENDING
CLE: 1.0-hour Standard credit PENDING
A certificate of attendance is available for individuals requesting CPE and PRP (Professional Recertification Program – formerly PACE) credits.

Who Should Attend: Estate planners, financial planners, investment advisors, insurance producers, retirement counselors, CPAs and JDs

Level of Complexity: Overview

Course Description:

As the investment environment evolved in the first half of 2022, equity markets saw a sharp correction and bond markets saw rising interest rates and falling share prices. Even as markets adjust to the uncertainty caused by Russia’s invasion of Ukraine, the economic effects of the pandemic appear to be fading, at least in its economic impact. In this presentation we will discuss the history of the stock and bond markets as well as the current impact of monetary policy, interest rates, the pace of recovery, trends in economic growth, labor market, company profits & earnings, and inflation.”

Learning Objectives:

- To have a better understanding of the underlying economic factors currently effecting the stock and bond markets to help the licensee better educate, calm and serve their clients.
- Provide a historical perspective so if/when the licensee and their investor clients feel gloomy and worried about the outlook, they don't panic and sell risk assets at inopportune times.
- Educate licensee's to thoughtfully focus on their own and their clients' holdings and valuations rather than when to buy and sell based on how they feel about the world.

Outline:

Introduction	5 minutes
Stock and Bond market history	10 minutes
Monetary policy, interest rates	10 minutes
Labor market, company profits and earnings	10 minutes
Inflation	10 minutes
Q & A	10 minutes

Instructional Materials for Registered Attendees:

Handouts, if any, will be included in the handout tab at Finaroo.org

Examination & Answers: No exam