

HOW TO LEVERAGE Tim Pierotti as a speaker at your next advisor meeting

WealthVest is committed to providing you, your advisors, and your clients with the resources to help grow your business. Tim Pierotti, Chief Investment Officer, joins WealthVest as a resource to support your next advisor meeting.

Tim focuses on long-term, big-picture themes shaping the global economy. Tim's helps advisors better understand the various perspectives and potential outcomes on a range of topics, specifically.

- The Secular Drivers of Inflation
- US Fiscal Credibility
- Geopolitical Risk
- The Impact on Emerging Technology on Productivity Growth
- Demographics
- Protectionism & De-Globalization
- Portfolio Construction – Annuities vs Bonds

How can you get Tim as a speaker at your next event? Use this QR Code to schedule Tim, or call Chad Dokken at 406-551-9411.

TESTIMONIALS

"We were fortunate to have Tim Pierotti as the featured speaker on a regional call. Tim has a unique ability to break down detailed economic information into an easily understandable and entertaining presentation. He is very engaging, and his talk generated significant audience participation, questions, and discussion, as well as follow-up requests for copies of his materials. I hope we can have him back for additional events!"

David **KALUZA**
Growth Officer, Cetera Investment Services



TIM PIEROTTI, Chief Investment Strategist at WealthVest

Tim has over 25 years of experience in various aspects of the equities business. Prior to joining WealthVest, Tim spent seven years in Equity Research management roles at Deutsche Bank and, most recently, at BMO, where he was a Managing Director and Head of US Product Management.



"I can join the chorus of people who are giving great feedback regarding Tim Pierotti's presentation to my team. It's refreshing to find an economist that can provide an economic update and subsequently translate that into how we can help our clients. It's great knowing we have partners like WealthVest that provide so much support to our program. Between economic updates, industry roundtables, and sales support, WealthVest has really turned into a key partner for our program. Thanks for your partnership. I look forward to even a better year in 2023."

Andrew **HAHN**

*Senior Executive, Program Manager
Northwest Investment Services*

"We are always looking to provide our advisors valuable insights on economic outlook, practice management, product trends, and other strategies. Tim's presentation was well-paced, and provided a great deal of timely economic data alongside a relevant and personalized analysis. We received great feedback from the audience, and we've even had the team request a copy of the presentation, or a copy of the recording for them to listen to again. We would love the opportunity to partner with you on future calls like these. Thank you!"

Angelo **PIETRI**

*Vice President, Relationship Manager
Infinex Financial Group*

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