

Center for Investment and Wealth Management

Calendar of Events

April 2019 **National Financial Literacy Month**

April 6, 2019 **LIFEvent Alumni Program**
10:00 AM - 3:00 PM UCI Merage School

April 9, 2019 **Up to Us Wild Card Event**
UCI Merage School

April 17, 2019 **Executive Committee Meeting**
Office of Kara Duckworth

April 25, 2019 **SheVest Investment Club Workshop**
5:30 PM - 7:30 PM Ashley Bleckner, CFP (R) , MA
Home of Victoria Collins

May 2, 2019 **LIFEvent Student Selection**
UCI Paul Merage School of Business

May 1, 2019 **Annual Advisory Board Retreat**
1:00 PM - 5:00 PM Island Hotel, Yorba Room

May 14/15 & 22, 2019 **LIFEvent Meet & Greet**
Santa Ana Unified School District Training Room

June 1, 2019 **LEAD OC LIFEvent Fundraiser Black-tie Gala**
Balboa Bay Club

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- June 23-29, 2019 **LIFEvest**
Cohort 1
- July 14-20, 2019 **LIFEvest**
Cohort 2
- July 22-26, 2019 **Investments, Financial Planning, and You**
Cohort 1
- July 28 - August 3, 2019 **LIFEvest**
Cohort 3
- August 1., 2019 **SheVest Investment Club Workshop**
5:30 PM - 7:30 PM Kara Duckworth, CFP®
Home of Victoria Collins
- August 5 - 9, 2019 **Investments, Financial Planning, and You**
Cohort 2
- August 21, 2019 **Advisory Board Meeting, Professional**
4:00 PM - 7:00 PM **Development Program and Reception**
- November 5 or 7, 2019 **CIWM and Merage School Distinguished Speakers**
6:00 PM - 8:00 PM **Series (DSS)**
- November 7, 2019 **SheVest Investment Club Workshop**
5:30 PM - 7:30 PM Evelyn Zohlen, CFP (R)
Home of Victoria Collins

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November 13, 2019 **Advisory Board Meeting, Professional
Development Program and Reception**
4:00 PM - 7:00 PM

January 16, 2020 **SheVest Investment Club Workshop**
5:30 PM - 7:30 PM
Kimberlee Davis
Home of Victoria Collins

March 4, 2020 **Advisory Board Meeting, Professional
Development Program and Reception**
4:00 PM - 7:00 PM

May 6, 2020 **Annual Advisory Board Retreat**
1:00 PM - 6:00 PM

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