



# Great Lakes Bay Estate Planning Council



## SAVE-THE-DATE

Thursday, January 23, 2025

12:00 p.m. to 1:30 p.m.

- SPEAKER:**           **GEOFF MOORE, CHIEF INFORMATION OFFICER  
VALMARK FINANCIAL GROUP**
- PROGRAM:**           **ARTIFICIAL INTELLIGENCE: PRACTICAL  
APPLICATIONS FOR PROFESSIONAL ADVISORSS**
- VENUES:**           **GREAT HALL BANQUET & CONVENTION CENTER,  
MIDLAND, MI**  
**-OR-**  
**ISABELLA BANK, MT. PLEASANT, MI**



Geoff Moore is the Chief Information Officer of Valmark Financial Group. He has over 20 years of experience in financial services, technology and cybersecurity strategies.

His presentation, “*Artificial Intelligence: Practical Applications for Professional Advisors*,” is intended to give practitioners in the fields of accounting, law, trust administration, financial planning, investment advice and insurance an introduction to the many ways artificial intelligence can help to provide realistic improvements and benefits within the wealth management area, as well as potential pitfalls.

Please mark your calendar and plan to attend this program to hear more about how Artificial Intelligence works and watch for the official Meeting Notice next month!