



# Great Lakes Bay Estate Planning Council

Website: [www.glbecp.org](http://www.glbecp.org)  
2024-2025 Officers

President: Chelsea Brown  
Vice-President: Shane Bradley

Sec/Treasurer: Kyle Fahrner  
Past President: Kevin Scorsone



Affiliated with **NAEPC**

## MEETING NOTICE

**DATE:** Thursday, January 23, 2025  
**TIME:** 12:00 PM – 1:30 PM  
**SPEAKER:** **GEOFF MOORE, Chief Information Officer, Valmark Financial Group**  
**TOPIC:** **Artificial Intelligence: Practical Applications for Professional Advisors**  
**PLACE:** **Great Hall Banquet & Convention Center  
5121 Bay City Road, Midland, MI 48642**  
**SATELLITE LOCATION:** **Isabella Bank, 139 East Broadway, Mt. Pleasant, MI**  
**TEAMS OPTION:** **This meeting will also be available on Microsoft TEAMS**  
*A web conference link will be emailed prior to the meeting*

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 them provide better advice to more clients. He will discuss how AI can provide realistic improvements and benefits within the wealth management area, as well as potential pitfalls. Also addressed will be the need to carefully balance regulatory compliance with the operational freedom of independent advisors, while still protecting sensitive client data.

Valmark Financial Group is a 60-year old company providing broker-dealer, investment advisory and insurance brokerage services to more than 100 independent member firms and their financial advisors around the country, including eight of the top 100 independent CPA firms and another twelve mid-sized regional firms. Four member firms are owned by publicly-held banking groups.

Geoff and his team of technology experts focus on delivering secure systems that enable operational excellence for member offices and Valmark business units. His team was recognized as a finalist for the Northeast Ohio Tech Team of the year by the Greater Cleveland Partnership. In 2023, Geoff was invited to be a member of the Surge Ventures Industry Council, and this year he was a Barron’s 100 panelist on artificial intelligence and a member of the Box.com Product Advisory Board for Artificial Intelligence.

Geoff is a frequent contributor on Fintech, cybersecurity and AI on LinkedIn, and has been a guest on dozens of podcasts focused on those same topics.

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**PLEASE NOTE:** *The PowerPoint provided by the speaker will be emailed to you before the meeting. Copies will be available in reduced size for those members attending in person in order to follow along with the speaker. The PowerPoint will also be added to our Document Library on the website before the meeting and can be accessed there at any time.*

This meeting will also be available on the Microsoft Teams platform. The link will be emailed to members early that week. If you have not received notice of the link by the day before the meeting, please contact us.

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Your registration is required if you plan to attend this meeting in person at either venue. A buffet lunch will be served at noon. You may register by sending an email to [admin@glbepec.org](mailto:admin@glbepec.org) or by mailing the registration form on the next page to: GLBEPC, P.O. Box 347, Freeland, MI 48623. Please RSVP by January 17, 2025.

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**MEMBERS:** \_\_\_\_\_ Please reserve a place for me at the meeting (no charge).

**NAME OF MEMBER:** \_\_\_\_\_

**LOCATION:**  Midland  Mt. Pleasant

**GUESTS:** (PLEASE NOTE: This meeting is available to all guests for a \$25 fee that includes lunch. The **first-time guest attendance** at no extra charge is **no longer available**.)

Please reserve places for \_\_\_\_\_ guest(s) at the meeting.

**GUEST(S)\*:**

Name	_____	Name	_____
Company	_____	Company	_____
Address	_____	Address	_____
	_____		_____
Phone	_____	Phone	_____
Email:	_____	Email:	_____

\*Use additional page for guest information if necessary.

**TOTAL ENCLOSED \$** \_\_\_\_\_

Please make checks payable to: **GREAT LAKES BAY ESTATE PLANNING COUNCIL (GLBEPC).**