Achieving Financial Security: A Community Forum

September 24, 2016

Presented by

HARTFORD CHAPTER
Society of Financial Services Professionals
Apostolic Fellowship Church of Christ Jesus
1153 Blue Hills Avenue
Bloomfield, CT 06002
Bishop Michael Geddis
Pastor
September 24, 2016

**Ages 18 – 35**
Topics: Getting Started, College debt, Establishing Good Habits, Avoiding Fraud

Bethel AME Church
1154 Blue Hills Avenue
Bloomfield, CT 06002
Reverend Daylan Greer, Sr.
Pastor
January 14, 2017

**Ages 36 – 50**
Topics: caring for minor children and aging parents; estate planning to protect the family; preparing for children’s college expenses, Saving and Investing, Avoiding Fraud

First Cathedral
1151 Blue Hills Avenue
Bloomfield, CT 06002
Arch Bishop Leroy Bailey, Senior Pastor
Dr. Michael Bailey, Co-Pastor
May 6, 2017

**Ages Over 50**
Topics: Budgeting, Estate Planning, Passing property to family members, Medicare planning, Social Security Strategies, Managing debt, Avoiding Fraud
AGENDA

8:30 am ................................................................. Refreshments
9:00 am ....................................................... Invocation and Introduction
9:10 am ....................................................... Letters and Case Study
9:25 am ....................................................... Interactive Panel Discussion
12 noon ........................................ Closing Remarks and Benediction
12:15 pm ...................................... Lunch/ Question and Answer Session

FORUM COMMITTEE

Kevin Baldwin, CLU, ChFC .........................................................Chair
Susan Lampros FLMI .................................................Program Director
Richard Mullany, CLU, ChFC .....................Past Hartford FSP Society
Chapter President

We thank our underwriting sponsor,
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Christel Ford Berry, JD*

Christel Ford Berry is the principal of Ford Berry Associates LLC, an attorney in private practice at the Law Office of Christel Ford Berry, LLC and an Investment I Advisor Representative with Voya Financial Advisors. She has a stellar legal background, working at top firms like Hebb & Gitlin and Shipman & Goodwin. 32 years ago she started her own law firm concentrating in the areas of estate planning, estate administration and real estate law. Shortly thereafter, she established a practice in financial services. Christel’s academic background is superb. She received her B.A. from Barnard College and a J.D. from the University of Pennsylvania School of Law.

Christel is very involved in the Greater Hartford community. Currently she is a Fellow of the Connecticut Bar Foundation, a Senior Fellow of the American Leadership Forum and the head of the Financial Freedom ministry at the First Cathedral. She presently resides in Hartford with her husband Thomas.

*Christel Ford Berry does not provide legal services on behalf of Voya Financial Advisors, Inc. or Ford Berry Associates, LLC. Ford Berry Associates, LLC is not a subsidiary of nor controlled by Voya Financial Advisors.

Brenden Healy, CPA

Brenden Healy CPA is Tax Director for the highly respected accounting firm, Whittlesey & Hadley. He has more than 18 years of experience in public accounting and is a IRS registered tax preparer. Brenden is also a teacher, serving an adjunct professor of accounting at the University of Hartford, as well as Middlesex and Three Rivers Community Colleges. Brenden can help you prepare taxes, but he also has wisdom to share regarding ways that you can legally minimize the amount of taxes that you are paying. Brenden received his BS in Accounting from Central Connecticut State University and a Master of Science in Taxation from the University of Hartford. He is married with five children and lives in Colchester.

Terrence Jennings

Terrence is a financial advisor with Merrill Lynch. Earlier this year he came from Morgan Stanley to join the Mathur, Simmons and Polla team at the firm. As a young man he is attuned to the needs of emerging professionals who are seeking to achieve financial success. But Terrence’s disciplined planning process enables him to work with clients of any age to craft solutions that meet their financial needs. Terrence is passionate about giving back to his community. From his work as a Sunday School teacher at Church on The Rock in New Haven to his mentorship of inner city kids in the Gang of Dads Organization he is making a difference around him. Terrence and his wife, Ije, have a 3 year old daughter named Grace.
Andre Jett

Andre Jett is a property casualty and life insurance general agent for Allstate Insurance Company. He owns a full service insurance firm, the Jett Agency, in Granby CT. Andre is an educator at heart and prides himself on his ability to help people understand their situations to the point where the insurance that they buy makes sense to them. He is a Wesleyan graduate, with wisdom in business developed over more than 25 years of experience working in premium firms like OptumHealth, Travelers, Acxius Strategic Consulting, The Hartford and Accenture. He is a member of First Cathedral Church and has 3 children ranging in age from 15 to 21. In May of this year, his oldest graduated from college and his middle child graduated from high school. With one in college and one in private school Andre is actively facing may of the issues we will be discussing.

Gary Ottenbreit

Gary Ottenbreit is a retired 41 year employee of the Social Security Administration and a retired Brigadier General in the Connecticut Army National Guard. The General has held several management positions in the Social Security Administration. He has deep expertise in Social Security rules and regulations and the ways that they apply to peoples’ lives. He also has deep ties to Connecticut. He was born in New Haven, graduated from Southern Connecticut State University with a bachelor and masters degree in Education. When he retired in April, 2016 he was the District Manager for the Social Security Administration in New Haven, CT. The General is a Board member for the Connecticut National Guard Foundation, Connecticut Veterans Military Coalition, 102 Infantry Regiment Association, 242 Combat Engineer Association, and The Institute Library of New Haven. He currently resides in Branford, CT with his wife, Patricia.

Stephen R. Vaughan

Stephen Vaughan is Vice President and Commercial Relationship Manager at Simsbury Bank. He works directly with business owners and managers to help them achieve their goals. Stephen has more than 28 years of commercial lending and financial consulting experience, serving as a banking officer at two other institutions as well as managing his own real estate mortgage company. Stephen is also a Pastor, who lives a life of service and integrity. He has been married to his wife, Adrienne, for 21 years.
Jacqueline Ellisor Wiggins, JD, LLM, CLU, ChFC, MS

Jacqueline Ellisor Wiggins is an attorney in the Estate and Business Planning Department at MassMutual Life Insurance Company. For the past 34 years, agents, brokers, and client’s advisors across America have sought her expert tax and legal advice in the areas of personal wealth, executive benefits, and business succession planning. She has a B.A. degree from Oberlin College, a J.D. from the University of Texas Law School, a LLM in Taxation from Boston University Law School, a Masters in Strategic Intelligence from The American Military University, a certificate from the Black Ministries Program from Hartford Seminary and Chartered Life Underwriter (CLU) and Chartered Financial Consultant (ChFC) designations from the American College. Jackie has a deep interest in the intersection of theology, politics, and human rights. She is also a student of the art of basket making. She is a member of the Board of Directors of the Hartford Chapter of the Society of Financial Professionals and an active member of Bethel AME Church. She has two adult daughters and a 6-year-old grandson who keeps her active.

Elvin D. Turner, JD, MBA

Elvin is the moderator of the panel. He is President of Turner Consulting LLC. He is a Wellness Advocate, enhancing corporate health wellness programs with a seminar series that relate wellness concepts across topics in health, personal finance, and the preparation for retirement. He and other advisory professionals offer his seminars to employees of corporate employers as well as to associates in non-profit organizations. He serves as secretary for the Society of Financial Service Professionals (FSP) where he is also a member of the Executive Committee, and chair of the both the Audit and Diversity Committees. In addition, Mr. Turner serves on the board of trustees for the Foundation for FSP. He is a Yale, Harvard Law and UConn MBA grad. He has been married to his wife, Katrina, for 25 years, has two adult children and is an active member of the Apostolic Fellowship Church.
For over 80 years the Hartford Chapter of the Society of Financial Service Professionals has been providing continuing education and professional development for credentialed financial advisors. Today almost 200 attorneys, CPA’s, Chartered Life Underwriters (CLU), Certified Financial Planners (CFP), and Chartered Financial Consultants (ChFC) as well as other credentialed advisors meet together on a regular basis to enhance their ability to provide high quality information and services to their clients.

**All of our members pledge to:**

“In all my professional relationships, I pledge myself to the following rule of ethical conduct: I shall, in light of all conditions surrounding those I serve, which I shall make every conscientious effort to ascertain and understand, render that service which, in the same circumstances, I would apply to myself.”

We appreciate the opportunity to present to you today this informational seminar that we hope will assist you in further strengthening your financial future.
ABOUT THE
APOSTOLIC FELLOWSHIP CHURCH

The Apostolic Fellowship Church of Christ Jesus is a Pentecostal-Apostolic church which began in the town of Newington, Connecticut in May of 1995 in the home of Bishop and Mother Geddis. Church members who were seeking a deeper spiritual experience gathered for prayer and study of the scriptures.

In June of 1995, the growing congregation rented modest commercial space in Plainville, Connecticut and transformed it into a beautiful chapel. The congregation continued to grow, attracting people from Connecticut and Western Massachusetts.

Pastor Geddis directed our search for a permanent Church home whose location would be north of Hartford and south of Bradley International Airport. We discovered a church building for sale in Bloomfield, Connecticut. Within a year and a half of its inception, the fledging congregation purchased that property at 1153 Blue Hills Avenue in Bloomfield consisting of a church building and parsonage, which were sitting on twelve acres of land. This was a miracle from the Lord for such a small and new congregation.

The phenomenal growth of the church continues as many have come to experience a total spiritual transformation being “born of water and the Spirit.” Additionally, two sister churches in Worcester, Massachusetts and Waterbury, Connecticut have been planted. Pastor Geddis presides over these congregations as Bishop. May the Lord continue to add daily “such as should be saved” as the truth of God’s Word is spread, embraced, and people become new creatures in Christ Jesus!

We believe that people are body, soul and spirit. Therefore the ministry of the church has to address people’s holistic needs. Apostolic Fellowship Church has ministries in the community with the homeless, prisoners and those in need of food and clothing. We also show our appreciation to our local police and fire department personnel. Now, we are pleased to host the “Achieving Financial Security” seminar series because these seminars address people’s need for financial and lifestyle guidance. We pray that many will be blessed by what they hear.
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Simsbury Bank is proud to support the Achieving Financial Security Forum instituted at Apostolic Fellowship Church and their great work to positively impact the lives of children and families in the community.

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ACKNOWLEDGMENTS

Thanks to Kevin Baldwin and Richard Mullaney, Hartford Chapter Presidents, for your leadership and vision in establishing the Achieving Financial Security program in the Hartford area.

Thanks to Bishop Geddis for saying “Yes” immediately and agreeing to host the first Achieving Financial Security event.

Thanks to Susan Lampros for your leadership and tireless efforts, both great and small, which have made this program a success.

Thanks to Reverend Greer and Arch Bishop Bailey and their church leaders for inviting the Hartford Chapter of the Society to hold the follow-up sessions in this important series at their respective churches.

Thanks to Janet Geddis, Deborah Griffin and all who worked with the culinary team to plan the menu, prepare and serve food.

Thanks to the countless volunteers at Apostolic Fellowship Church who have worked together to prepare for and welcome the guests who are here today.

Thank you to the Pastors, friends and community members who came today to support this program. We pray that you were enriched by what you heard.

Thank you to all who travelled from outside of northern Connecticut to be a part of the program today. We are grateful for your sacrifice and pray that you were blessed by what transpired.

Thank you to our panelists who gave of their time, expertise and hearts in order that others might have the information that they need to make additional progress in their lives. We appreciate your great work and sacrifice.

Thank you for our financial sponsor, Simsbury Bank. Your generosity and concern for people in our community made all of this possible. Many thanks.