

THE FINANCIAL AND ESTATE PLANNING COUNCIL OF METROPOLITAN DETROIT

Presents

“Investing In Bonds In A Low Rate Environment”

presented by:

Nick Goetze

Managing Director, Head of Fixed Income Services Group
Raymond James

TUESDAY, FEBRUARY 2, 2016

WAYNE STATE UNIVERSITY STUDENT CENTER

5221 Gullen Mall, Detroit, MI 48202

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Nick Goetze, Managing Director, Head of Fixed Income Services Group joined Raymond James in 2012 through the acquisition of Morgan Keegan & Co. He serves as one of the managing directors leading the firm's private client fixed income team. As head of the Fixed Income Services Group, his primary responsibility is coordinating the efforts of fixed income strategy, high net worth, underwriting, and trading professionals with financial advisors. He also works with advisors on some of the firms' largest fixed income clients using industry leading, proprietary fixed income resources.

Nick is a veteran of over 15 years in the Financial Services profession. Prior to joining Morgan Keegan in July of 2003 he was employed by Legg Mason and Alex Brown and Sons, both located in Baltimore, MD. He received a Bachelor's of Science in business from Cornell University and currently serves as co-chair of SIFMA Retail Fixed Income Committee.

Event Take-Aways: True bond market concerns versus media headline noise
What moves the yield curve and what are the influences along the curve
How to best create bond portfolios to distribute to the next generation
New industry policies in place for delivering closed tax lot information to the IRS
How bonds are priced on statements

AGENDA: 5:30 p.m. Complimentary Cocktails & Student Led Tours of the Venue
6:30 p.m. Presentation – Student Center Ballroom
7:30 p.m. Dinner – Student Center Ballroom

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