

San Jose State University

College of Business

Lucas Graduate School of Business

powering Silicon Valley

## The Lucas Graduate School of Business Presents: *Silicon Valley Leadership Perspectives*

Join us for the first of our Educational Speaker Series

*“Wealth Management”*

June 23rd

5:30-6:00 - Reception

6:00-7:00 - Panel Discussion

The Wealth Management panel will offer insight on developing the skills and solutions for building effective wealth management plans, constructing state-of-the art portfolios, and providing information on asset protection during this volatile market.



**Robert Dillow** - Private Wealth Advisor and Financial Planner of Sagemark Wealth Management. Bob has been serving clients with financial advice since 1992. He is trained in the comprehensive approach to financial planning and is fluent in all aspects of investment management. Bob received an MBA from Saint Mary's College and his BS in Business Administration from SJSU. He holds the Certified Financial Planner™ certification.



**Richard Stone** - Founder and CEO of Salient Wealth Management, LLC, he has been engaged in investments and financial planning in the Bay Area for 40 years. At Salient, Richard sets global investment strategy, while working closely with clients to develop investment policies and manage their portfolios on an on-going basis. Richard holds a BS in Business Administration from SJSU and was one of the initial 42 Certified Financial Planner™ certificants credentialed by the College for Financial Planning in 1973.



**Robert Sullivan** - Co-Founder of Sullivan & Serwitz. In 1978, Bob graduated from SJSU College of Business with a vision: to provide objective and comprehensive financial counseling services. His goal was to educate clients so they could make informed decisions and act in their own best interests. In 1989, Bob joined with Marshall Serwitz to establish Sullivan & Serwitz as an independent financial advisory firm that has evolved into a Multi-Family Office.

Please RSVP by June 12th to Sofia Moede at 408-924-3394 or [moede\\_s@cob.sjsu.edu](mailto:moede_s@cob.sjsu.edu)