

Wells Fargo Advisors

Determining Owner Readiness

Tuesday, September 16, 2025 • 11:30 AM - 1:00 PM

Join us for a panel discussion for business owners, moderated by Marco Lloyd, Senior Vice President – Investments. We will dive into key topics to help business owners plan for what's next – whether that's growth, succession, or simply peace of mind. Enjoy lunch, connect with peers, and walk away with insights tailored to the unique challenges business owners face.

Pappadeaux Seafood

Tuesday, September 16, 2025 • 11:30 AM - 1:00 PM

12711 Hwy 59 South

Stafford, TX 77477

A complimentary lunch will be served.

RSVP to **Angela Lord** by **Thursday, September 11, 2025** at **281-340-8840** or

angela.lord@wellsfargoadvisors.com.

Guest speakers

David Dickens, Regional Vice President, Retirement

Manulife John Hancock

Ryan Keane, Field Vice President

Pacific Life

Sugar Creek Wealth Management Group of Wells Fargo Advisors

Bill Hawker

Managing Director - Investments

Direct: (281) 340-8817

william.hawker@wfadvisors.com

www.sugarcreekwmg.com

CA Insurance # 4211000

This seminar is supported and financially sponsored by Manulife John Hancock and Pacific Life.

The opinions of any of our guest speakers are their own and do not necessarily reflect the opinions of Wells

Fargo Advisors.

This event is educational in nature. No specific products will be discussed. 01142027-8183252.1.1

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