



*Thursday*

**8:00 – 9:00**

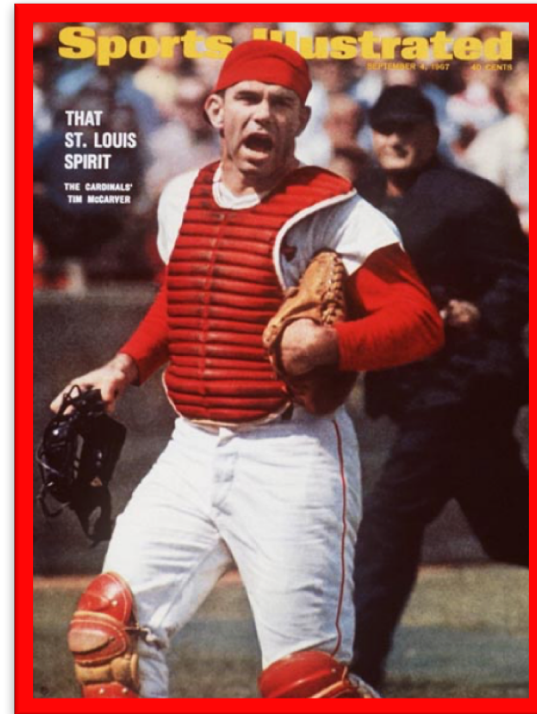
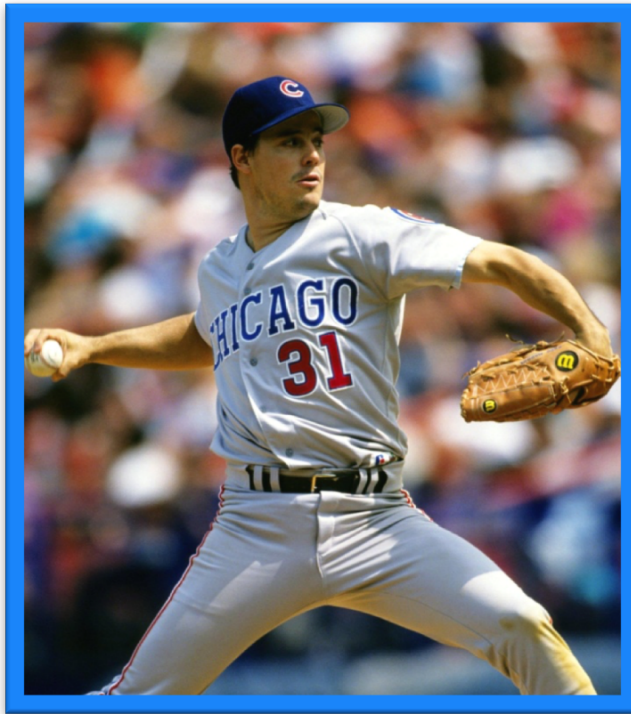
**Ceremonial First Pitch  
& Conference Opening**

**David Koshinski**









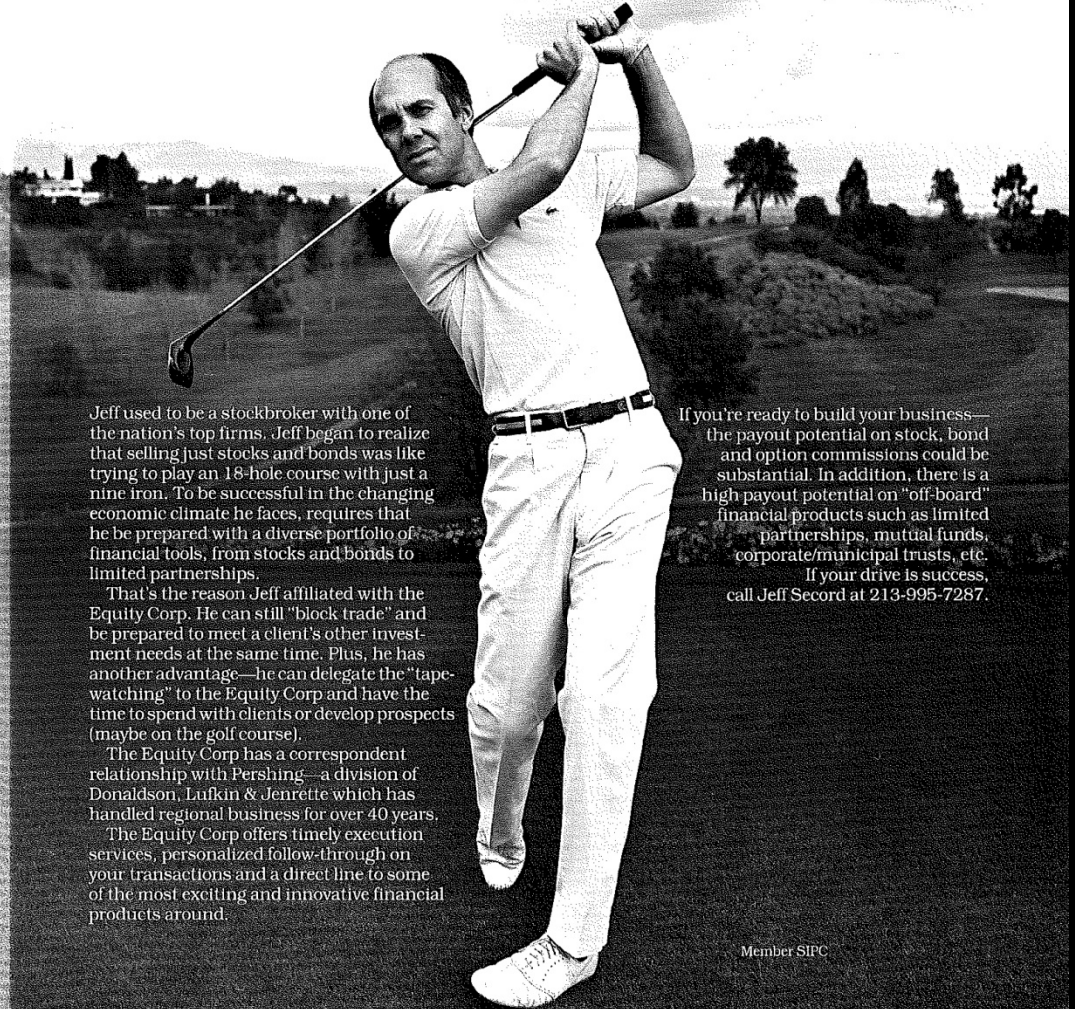


## Pitcher & Catcher

They are like minded from  
different perspectives.



# **Jeff Secord's drive is success. He chose Integrated Resources Equity Corporation... The National Firm with the regional touch.**



Jeff used to be a stockbroker with one of the nation's top firms. Jeff began to realize that selling just stocks and bonds was like trying to play an 18-hole course with just a nine iron. To be successful in the changing economic climate he faces, requires that he be prepared with a diverse portfolio of financial tools, from stocks and bonds to limited partnerships.

That's the reason Jeff affiliated with the Equity Corp. He can still "block trade" and be prepared to meet a client's other investment needs at the same time. Plus, he has another advantage—he can delegate the "tape-watching" to the Equity Corp and have the time to spend with clients or develop prospects (maybe on the golf course).

The Equity Corp has a correspondent relationship with Pershing—a division of Donaldson, Lufkin & Jenrette which has handled regional business for over 40 years.

The Equity Corp offers timely execution services, personalized follow-through on your transactions and a direct line to some of the most exciting and innovative financial products around.

If you're ready to build your business—the payout potential on stock, bond and option commissions could be substantial. In addition, there is a high payout potential on "off-board" financial products such as limited partnerships, mutual funds, corporate/municipal trusts, etc.

If your drive is success, call Jeff Secord at 213-995-7287.

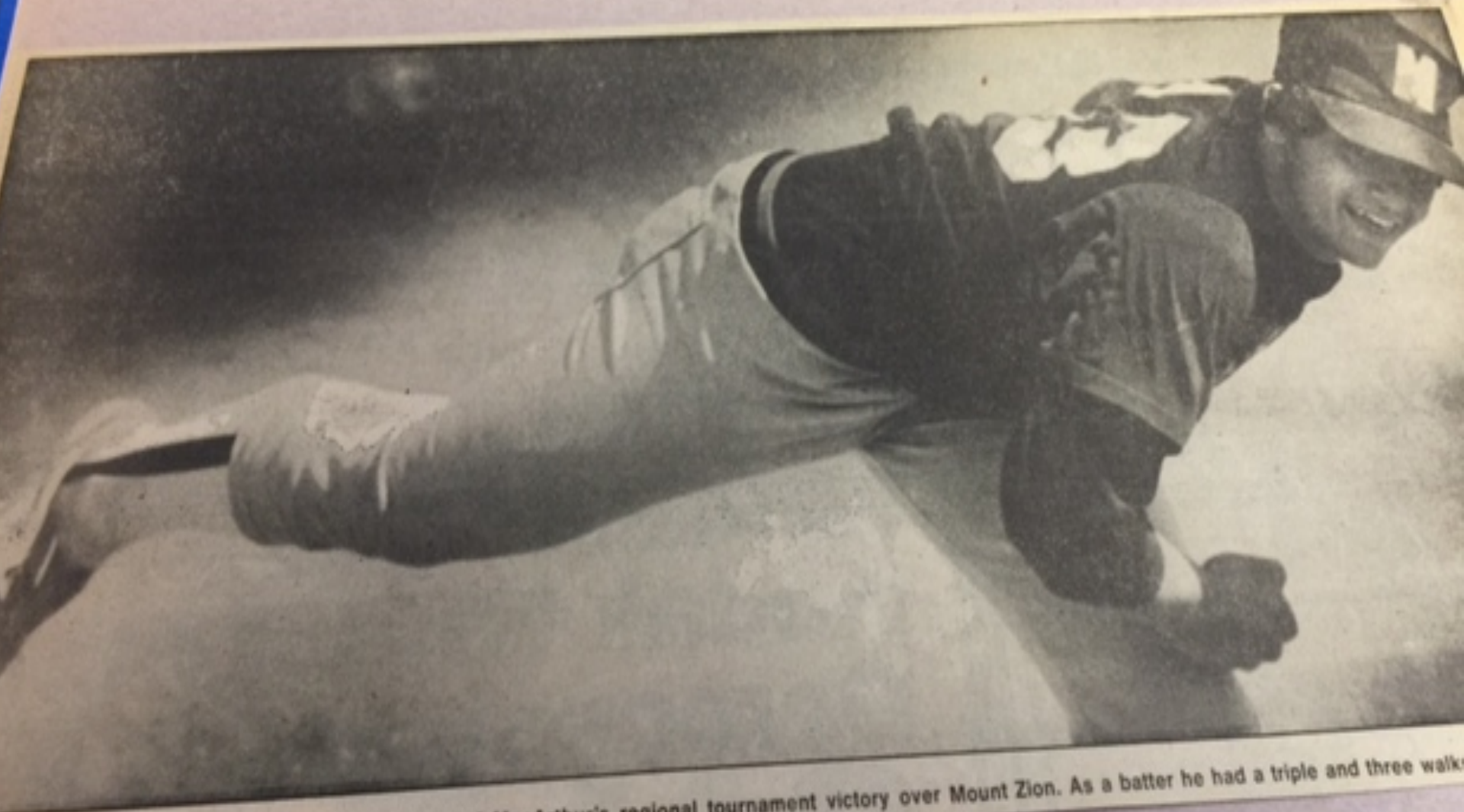
Member SIPC





Jeff Secord, John Campbell, Allen Gaston, Bill Tuggle, Waldon Mulliken and Dick Wilcox, left to right, are "Doing the Ape" as their theme song for their new combo, Allen and His.

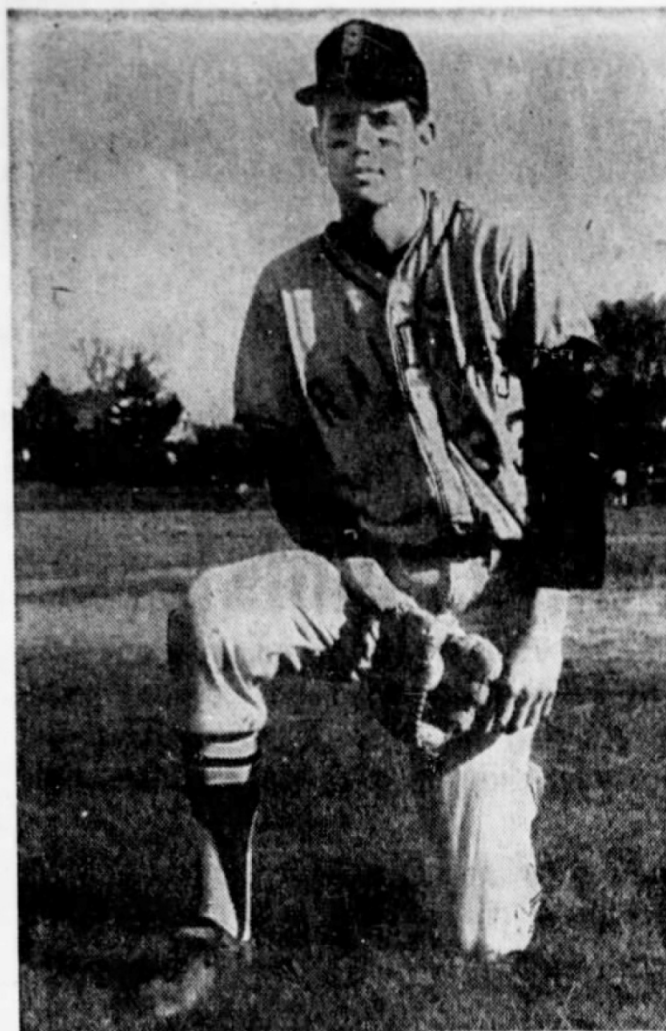




Jim Minton pitched two innings of MacArthur's regional tournament victory over Mount Zion. As a batter he had a triple and three walks.







## Throws No-Hitter

Dave Koshinski, a Bloomington High School senior, threw a no-hitter Tuesday as the Purple Raiders defeated Central Catholic, 11-0, in an Intercity Conference baseball game at BHS. The game was called after five innings on the 10-run rule. (Pantagraph Photo)

# Koshinski In No-Hitter

By Greg Woith  
Pantagraph Sports Writer

Dave Koshinski, a lanky lefthanded senior, kept the ball low and threw a no-hit shoutout Tuesday afternoon as Bloomington High School whipped Central Catholic, 11-0, in an Intercity Conference baseball game at BHS. The game was called after five innings on the 10-run rule.

The Purple Raiders are 4-1 in the Intercity while the Saints finish at 1-5 in the conference.

Koshinski walked only one and threw out seven runners. He struck out four in raising his season record to 3-1.

In addition to pitching, Koshinski rapped a single to center in the first inning that scored one run. BHS accounted for five runs in the first. A single by Dave Todd tallied two runs and three Raiders scored on Central errors.

Bloomington continued the scoring barrage in the second, with four runs crossing the plate. Singles by Koshinski and Todd, the last two batters in the order, produced two runs.

Bloomington got another run

on a passed ball and scored again on an error.

An error and a hit batsman with the bases loaded in the third inning completed BHS' scoring.

Central Catholic					Bloomington				
ab	r	h	b	i	ab	r	h	b	i
O'Rourke, 2b	3	0	0	0	Burd, ss	3	1	0	0
Matthews, ss	2	0	0	0	Selzman, ss	0	0	0	0
McGuire, c	2	0	0	0	Henderson, 2b	3	1	0	0
Hundman, p	1	0	0	0	DeVary, 3b	3	3	2	0
O'Rourke, lf-1b	1	0	0	0	C'eer, lf-cf-1b	1	1	0	0
Smith, 1b-1f	2	0	0	0	Laesch, 1b	3	2	1	1
Bardwell, rf	2	0	0	0	Seyler, 3b	0	0	0	0
Salowitz, 3b	2	0	0	0	Abfalter, cf	1	2	0	1
Elliott, cf	2	0	0	0	McClure, lf	0	0	0	0
					Marquardt, lf	1	1	0	1
					Miller, rf	1	1	0	1
					Thomas, f	0	0	0	0
					Koshinski, p	3	0	2	2
					Todd, c	3	0	2	1
Totals	17	0	0	0	Totals	21	11	7	6

Central Catholic	000 00—0
Bloomington	542 0x—11

E—O'Rourke 2, Matthews 2, Richardson, McGuire, Henderson 2, Burd. PO—A—Central Catholic, 12-4; Bloomington, 15-5; LOB—Central Catholic 3, Bloomington 7. SB—Burd, Henderson. S—DeVary, Hundman. SF—Henderson.

	ip	h	r	er	bb	so
Hundman (L, 2-3)	4	7	11	4	5	1
Koshinski (W, 3-1)	5	0	0	0	1	4

HBP—By Hundman (Abfalter) and Miller). U—Roznowski and Jackson. T—1:30.

## Prep Track Today

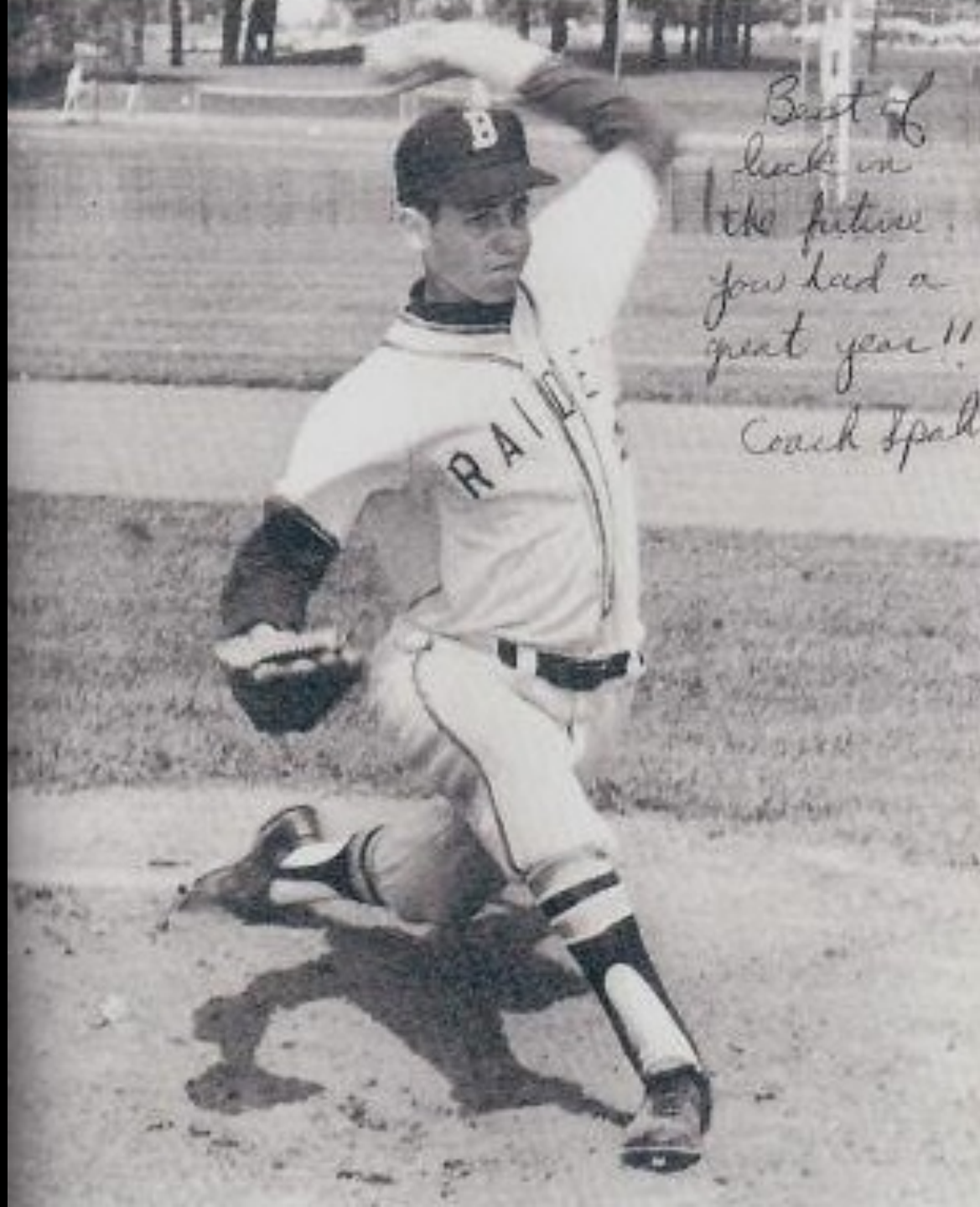
Kickapoo Meet at Heyworth

## Prep Tennis Today

Lincoln at Bloomington

## College Tennis Today

North Park at Wesleyan



Best of  
luck in  
the future.  
You had a  
great year!!  
Coach Spall





### *Aid BHS Victory*

Purple Raider Robin Cooper (left) claimed his second district victory in four days as Bloomington High School easily shut out Wapella High School, 7-0, for the Bellflower District title Friday afternoon. Dave Koshinski

(center) was the starter and went three for four at the plate with three RBIs while Brian Burd (right) added three more hits to the BHS onslaught. Cooper is 8-2 for the season. (Pantagraph Photo)

# Bloomington Captures District Championship





The best thing a pitcher can do  
is shine the spotlight on others!





# Minton supplies punch

By MARK AMBROGI  
Herald & Review Sports Writer

Jim Minton pities the opposing batters. "I figure if I hit against our outfield all the time," said Minton, a catcher on the Decatur Post 105 American Legion baseball team. "It would cost me about 100 points off my batting average. They cover so much ground. They get to the ball so well that it makes it easy for our pitchers."

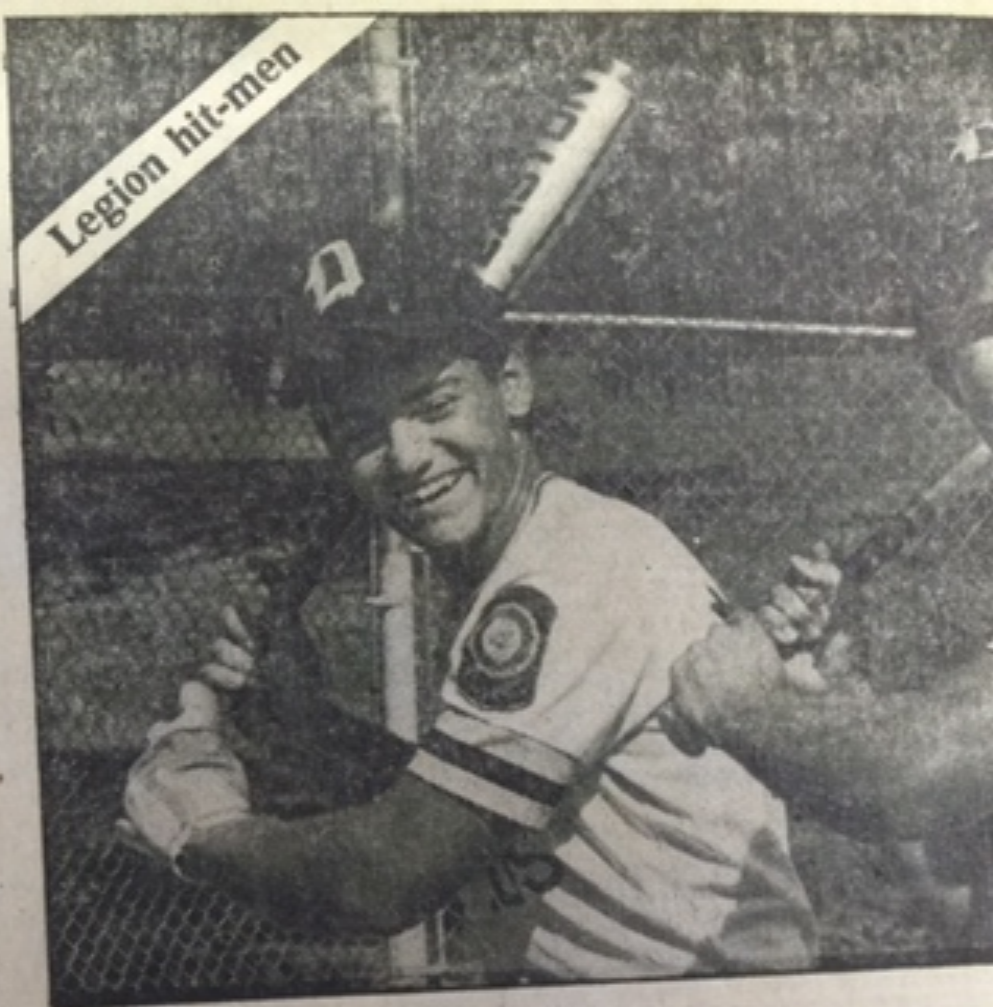
The outfield is comprised of center fielder Kevin Koslofski, right fielder Don Tolly and Kent Dixon and Jeff Moslehi in the left field spot.

"This is the best defensive team of the high school and Legion teams I've play on," said Minton, a former MacArthur standout.

Decatur will play Virden in the fourth division tournament Thursday at 3:30 p.m. at Chatham. Decatur advanced by winning the 19th district tournament for the eighth straight year.

"We didn't get excited when we won the district," said Minton, who is playing with the Legion for the third year. "We know that winning is something that we should do. Now we have to get down to business and find out how good a team we really are."

"After struggling through the regular season, we seem to be peaking now. Everybody is hitting. Everybody is pitching in and doing what they're asked to do. Early in the season we were getting people on base, but not driving in any runs."



Jim Minton, left, and Don Tolly supply the

To do that Minton is being more selective with the pitches he hits. "I'm looking for a certain pitch that I can drive real hard," Minton said. "I'm also taking a real rip at the pitches instead of just making contact."

Minton doesn't feel he's sacrificing average. "I like hitting with two strikes," he said. "So I don't mind taking a few pitches while I'm waiting for my pitch."

Hitting has never been a problem for Minton. Defense, at least, in college has. Minton has been using the Legion play to bone up on his catching ability. A sophomore is expected to bone up on his catching ability to nail

the ball in stopping it.

"It's a Mike Moslehi everyone for that."

Becoming Minton. In baseball. first.

"Catcher"





Photo by Herb Slodounik

## Pushing their luck

Pride catcher Jim Minton, left, holds on to the ball after tagging Kendall Wildey out at the plate during the first game Saturday. Wildey, of the Shel-

byville, Ind., Sting, was cut down at the plate on a throw by Bob Barron after a teammate had already scored. **Details/CS.**

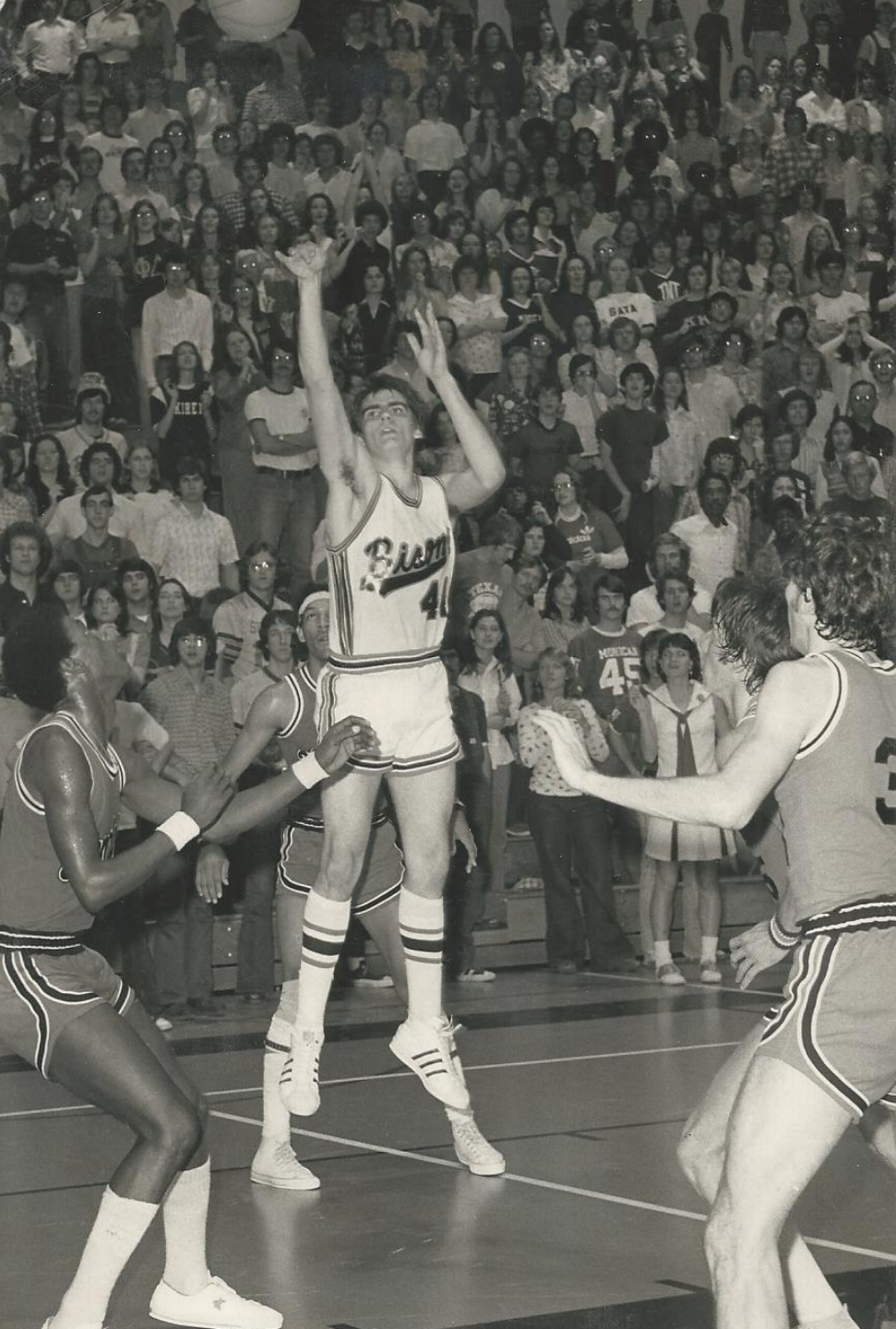




*Sweet Sixteen*

*1977*













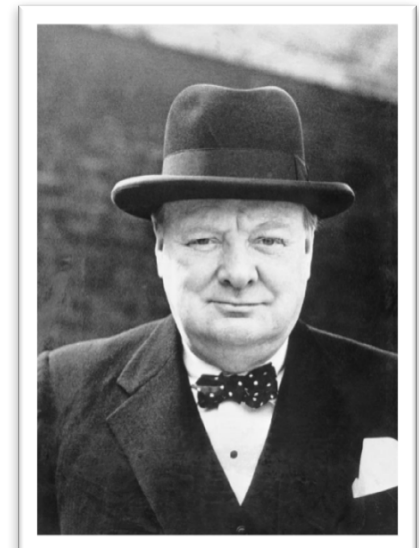




***“Don’t waste a good crisis.”***



- **Rahm Emanuel**
- **Winston Churchill**





# Crisis Invites Clarity



# Clarity Invites Purpose





# Purpose Impacts Others





# Baseball taught me more than the classroom.

- Discipline
- Practice & Conditioning
- Failure





# Baseball has failures that are logged.



- Error
- Wp
- Pass Ball
- Home Run
- Run Scored
- Game Lost





# Baseball has failures that aren't logged.

- Missed Swing
- Pitch Off the Plate
- Pitch On the Plate





# How those failures compare in our business.

- Slow to follow up to a client
- Holding on to or taking on clients that don't fit your goals or vision
- Miss info on forms
- Client Complaints





People who **fail forward** are able  
to see errors or negative  
experiences as a regular part of  
life, **learn** from them, and then  
**move on.**

*John Maxwell*





**It's not failure,  
it's one  
step  
closer to success!**







**These failures can either hold you down or become a stepping stone for long term success**

**We could list or reflect on the successes that were created as a result of those failures.**







## **2020 Vision Statement**

**IPI is known as the innovator of Strategic Lifestyle & Wealth Management for the mass affluent and affluent advisor.**

**Our solutions assist advisors in growing and managing their practice. Our industry leading IPI Wealth Station provides integrated planning and proposal tools, paperless transmission and workflow support, and consolidated cloud based reporting for clients and advisors.**

**IPI staff is accountable to our culture of excellence philosophy. They provide a high level of support to our advisors, embrace creativity, and pursue personal growth each day.**

**We are successfully assisting our advisors in transforming their offices to a legacy practice that combines their historic success with a culture that impacts the quality of life in their community.**

**We will support between 150 and 200 wealth advisors with a strategic lifestyle and wealth counseling focus. Our average practice will have \$75 million AUM with 200 to 500 clients.**

## Strategic Lifestyle and Wealth Management™

The design and implementation  
of accumulation, preservation,  
distribution, and transfer strategies  
to leverage client wealth towards  
the ultimate goal of achieving  
significance and peace of mind.©

### Investment Planners, Inc.

226 W. Eldorado St., Decatur, IL 62522  
217-425-6340  
217-425-9581 (fax)  
ipi@investment-planners.com



**Investment Planners, Inc.**  
Integrity ★ Performance ★ Innovation

**IPI Wealth Management, Inc.**  
Strategic Lifestyle and Wealth Management®

Ensuring Your Significant Future

## OUR MISSION

Helping People Achieve  
Significance and  
Peace of Mind

## OUR VALUES

### INTEGRITY

High Moral Character -  
Consistency of Commitment

### PERFORMANCE

Achieving Goals for Clients

### INNOVATION

Strategies - Execution

## OUR CORE COMPETENCY

Delivering Client Focused  
Financial Strategies

## OUR PHILOSOPHY

### Honor God in All That We Do

Create an atmosphere where  
decisions are always based on  
the best interest of the client

### Promote a Culture of Excellence

Provide a high level of  
support to the advisor

### Build Successful Partnerships

Encourage the sharing of ideas  
and talents for the good of all



# What is your vision of tomorrow?

## Obstacles – Challenges - Opportunities

- We do not have obstacles
- We have challenges that give birth to opportunities



# DIFFERENTIATORS

**Community  
Outreach**

**DOL Solutions**

**Clear Value Proposition  
tied to Pricing**

**Income Solutions  
Risk Mitigation**

**(The correct application  
of Liquid Alternatives)**



# SEC reasserts itself on investment advice standards, but it's not clear whether it will overtake DOL fiduciary rule

New SEC Chairman Jay Clayton makes request for comment of fiduciary duty one of his first actions, as DOL reassesses its measure



# IPI Wealth Management, Inc.

Strategic Lifestyle and Wealth Management™

## The Value of Advice

### Investment Management

- **Suitability**
  - Risk tolerance
  - Financial needs vs. capacity
- Investment Policy Statement
- Hub (Core) and spoke (Tactical) philosophy
- **Security selection**
  - Independent selection
  - No proprietary products
  - Multiple institutional research sources
  - Proprietary investment selection process
  - Expense awareness and comparisons
- **Portfolio construction**
  - Multiple independent sources of economic outlooks and analysis
  - Experience through a variety of market cycles
  - Cash distribution management
  - Patience
- **Monitoring and rebalancing**
  - Facilitates potential improvement of returns and reducing market cycle risks

### Wealth Management

- **Our process... Strategic Lifestyle and Wealth Management™**
  - Clarification of goals and objectives
  - Analysis
    - Financial planning assumptions
    - Investments
  - Recommendations
  - Implementation
  - Monitoring and updates
- **Financial Planning**
  - You
  - Your business(es)
  - Your family
  - Define significance... what do you want to achieve?
    - Now
    - Three years
    - Beyond
- Personal financial planning simulation
  - What if scenarios to test goals and scenarios
  - Monte Carlo analysis to test multiple investment outcomes
- Consistent communication
- Caring + trust = peace of mind
- Free up your time and energy
- **Tax management**
  - Constant awareness
  - Asset location strategies
  - Integration with entire team of advisors
  - Call in outside resources as needed

### Concierge Services

- Next generation success
  - You and your business and family
  - Our team who serves you
- Philanthropic planning
- Risk management services
  - Long term care considerations
  - Life and disability insurance considerations
- Social security claiming strategies
- Assistance with book keeping strategies





**We are successfully assisting our advisors  
in transforming their offices to a legacy  
practice that combines their historic success  
with a culture that impacts the quality of life  
in their community.**

# Decatur Experiment





# Shine the Light on You





# IPI Wealth Management Team of Decatur



*Jim Minton • Caleb Smoes • Tom Ealy • John Foley • Jeff Secord*



We have a  
transformation  
strategy...



Not an exit strategy.





**It took the Cubs 5 years to build their team.  
Our team is almost complete.  
The final pieces are coming together.**







**We are successfully assisting our advisors  
in transforming their offices to a legacy  
practice that combines their historic success  
with a culture that impacts the quality of life  
in their community.**



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**They partnered with us because they saw us for who we could be. Not because who we were.**





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# A Big Thank You to This Year's Sponsors





**BUILD  
YOUR  
LEGACY**

**TRANSFORM  
YOUR  
PRACTICE**



**SHARPEN YOUR GAME**

# Extra Innings

**AUGUST** Webinar THE LANGUAGE OF CHANGE

**SEPTEMBER** Destination Mtg. INLAND & FIRST TRUST

**OCTOBER** Multiple Technology Webinars

**NOVEMBER** Destination Mtg. ENVESTNET & MORNINGSTAR





# Go Team, Go

