

Dean's Executive & Research SEMINAR SERIES

PRESENTS A SEMINAR ON

Governance and Wealth Management: A Three Step Framework for Institutions, Fiduciaries, and Families

DATE

WEDNESDAY, DECEMBER 4, 2019

TIME

12:00 pm to 1:00 pm

(Refreshments @11:45am)

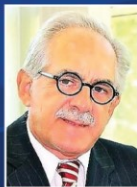
LOCATION

BDC 402D (Dezember Leadership Center)

Admission: Free



SCHOOL OF
BUSINESS AND PUBLIC
ADMINISTRATION



GUEST SPEAKER

Frank Colatruglio, CFA, CFP

*Managing Director – Investments
Colatruglio Wealth Management Group of Wells
Fargo Advisors*

Frank has been active in various roles within the community, including serving as International Service Director for the Bakersfield East Rotary, as Past President of the Board of Directors of the Estate Planning Council of Bakersfield, as Treasurer of the Petroleum Club of Bakersfield, and Past President of the Alzheimer's Disease Association of Kern County. He currently serves on the Executive Advisory Council to the Dean of the School of Business and Public Administration at CSUB, the Board of Directors of the Estate Planning Council of Bakersfield as well as the Board of Directors for the Distinguished Young Women of California. Frank also serves as an adjunct lecturer in Finance at California State University, Bakersfield (CSUB). He has been a member of the Bakersfield East Rotary Club since 2000.

Frank graduated with honors from CSUB with a Bachelor's degree in Business Administration/Finance and Psychology. He has continued his education by obtaining the Chartered Financial Analyst (CFA) and the Certified Financial Planner (CFP) certifications. He is a member of the CFA Institute and the CFA Society of Los Angeles and is a former grader for the CFA examination program. He holds the Series 7, 63 and 65 registrations as well as a California insurance license.

RSVP to
bpaevents@csub.edu
by Monday, December 2