

# CIC XXVI LIGHTS UP FINANCIAL PATH

If knowledge is the key to a bright future, then attendees at the 26th Annual Carter Investment Conference on Nov. 19 walked away informed, enlightened and engaged.

With comments like, “This was the best conference yet,” to “The breakout presentations were very educational,” the day was an all-around success and proof-positive that the annual conference continues to be a real crowd pleaser.

“Among other highlights, the new session, Finance 101, was a big hit; participants from all age groups enjoyed the fundamentals class,” says Robert H. Berg, CFP®, vice president of Carter Financial Management (CFM) and organizer of this year’s conference. “Congressman Barton, our lunch speaker, also gave us solid insight as to where Congress is now, and where it is headed for the future.”



▲ *William and Whit Taylor*



▲ *(from left) Peggy Van Buren, Tara Chavez, Patty Ries and Carol Croy*



▲ *(from left) Fran Carter, Merle Borchelt, Linda Borchelt*

Other keynotes included Dr. Mine Yücel, who spoke about the effect of energy on the Texas economy, and William Fries, CFA, who provided a perspective of the global stock market.

2006 marks CFM’s 30th anniversary, and plans are already in the works for the 27th Annual Carter Investment Conference on Nov. 18, 2006. Mark your calendar and plan to attend!



▲ *(from left) Bill Carter and Congressman Joe Barton*



▲ *Dr. Mine Yücel and Bob Berg*



▲ *William Fries*