

# THE SPARTAN SHIELD

Spartan Invest - Quarter 3, 2019



## - Educating - Empowering - Enlightening - Spartan Summit 2019

During Q3 2019, a small group of dedicated Spartan Invest team members spent many hours organizing, creating, budgeting, and analyzing every minute detail in preparation of our first-annual Spartan Summit, which was held October 2-4 in Birmingham. Our main goal was to offer what many other wealth building conferences lack – a first-hand look at tangible investment opportunities and the actual environment in which they exist. We wanted to showcase our beloved Birmingham in a way that our tenants see it daily – a vibrant, welcoming community in the middle of a grand resurgence.

We also wanted to provide strategies for overall wealth-building in addition to highlighting what Spartan offers; we believe in offering valuable content to help clients make educated decisions. The way one leverages their resources is just as important as selecting the individual assets themselves. The six conference speakers graciously shared their vast knowledge of retirement planning, tax strategies, asset protection, and passive income generation to an eager, engaged crowd.

Scroll on for more highlights of Spartan Summit 2019!

Address:

2015 3rd Avenue N  
Birmingham, AL 35203

Phone:

205-202-4118

Email:

[info@spartaninvest.com](mailto:info@spartaninvest.com)

Web:

[www.spartaninvest.com](http://www.spartaninvest.com)





## M.C. Laubscher

M.C. Laubscher is a wealth and investment strategist, cashflow coach, and educator. He is the creator and the host of the popular business and investing podcast Cashflow Ninja, which was featured by Entrepreneur Magazine as one of the top podcasts for entrepreneurs. M.C. spoke on the benefits of being your own bank and how to create, protect, and multiply wealth, no matter the status of the economy.

## Lisa Billings

Lisa Billings joined Warren Averett in 2005, but has over 19 years of experience. She is a Member in the firm's Tax Division, assists clients with strategic planning and has served as the firm's Tax Policy and Procedure Best Practice Leader. Lisa spoke on the recent changes to tax law and how the potential impact those changes might have on various investments.



## Amanda Holbrook

Amanda Holbrook is the Vice President of Business Development for Specialized Trust Company and has been a passionate, driving force in the world of self-directed IRAs for over 10 years. Amanda is an expert in making IRAs work for you and allowing for more control over your portfolio.



## Graham Parham

Graham Parham is a Mortgage Loan Officer at Highlands Residential Mortgage and has over 18 years of experience. His current, first-hand understanding of the real estate investment climate is a huge benefit to his clients. Graham spoke on the benefits of leverage and utilization of 1031 Exchanges and what to avoid doing while going through the lending process.



## Aaron Young

Aaron Young is the Chairman/CEO of Laughlin Associates, a 44-year-old company that has helped over 100,000 entrepreneurs start, grow, and profit from their businesses. He has made it his life's work to arm other business owners with success formulas that immediately provide exponential growth and protection. Aaron spoke about the importance of protecting yourself from lawsuits before they even begin through the separation and shielding of assets.



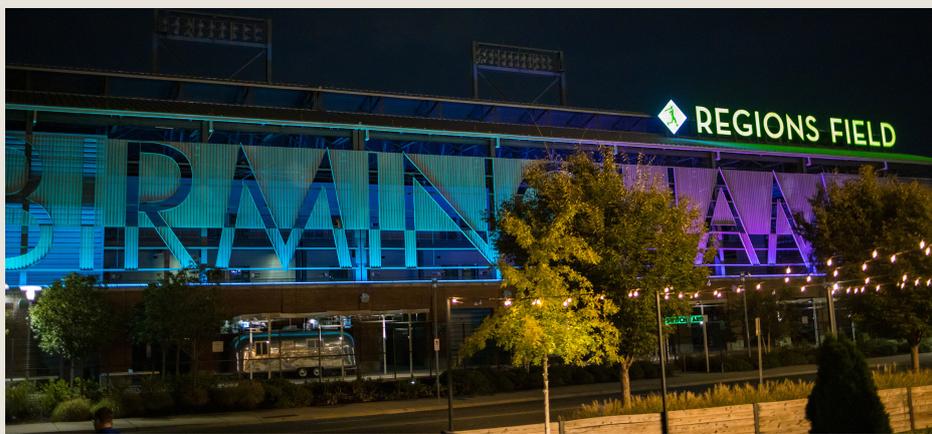
## Dan Zitofsky

Dan Zitofsky is the #1 bestselling author of *Passive to Prosperous* and a master in the art of accumulating passive wealth. Dan has closed over 1,000 fix and flips, 650 rental properties, over 800 multi-family projects, and more than 1,000 private money and non-performing note transactions. Dan spoke on the many benefits of real estate investing, why you should invest in multiple properties, and what to look for in a market.



## All Birmingham Has to Offer

Spartan Summit 2019 offered a plethora of opportunities for our visitors to get to know our team and one another. Guests had the option of attending an upscale dinner at The Club, getting in a few swings at TopGolf, and socializing at Good People Brewing Co. We certainly enjoyed spending down time with friends both new and familiar.



# Downtown Tour and More

We loaded up on a charter bus for an information-packed tour of the Magic City, conducted by our very own Birmingham expert, Client Services Manager Scott Hildebrandt. We made a pit stop by one of our turn-key properties, to see a passive income opportunity in person.



# Thank You So Much!

None of this would've been possible without the participation of our guests, which included our current investors and newcomers to the industry. We've already begun preparation for next year's event, and we're working to make the next one even better! Stay tuned for more information as it becomes available.

