

Ohio Court Reporters Association

605 North High Street, PMB 298
Columbus, Ohio 43215
(614) 300-0906
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www.ocraonline.com



OCRA's District D CEU and Social Event

Saturday, September 29, 2018

.35 CEU

(NCRA approved)

Country Inn & Suites by Radisson

1420 Main Street
Cuyahoga Falls, Ohio

9:00 a.m. - 9:30 a.m. Registration *(Onsite registration available with added \$15 convenience charge)*

9:30 a.m. - 11:00 a.m. Financial Planning - Do you have your ducks in a row? (.15 CEU)

Jesse Hurst, founder of Impel Wealth Management, helps his clients move forward with their life goals. Impel Wealth Management provides customized financial guidance with clarity and insight, delivered with a personal touch and driven by relationships forged. Their team of dedicated professionals takes the time to get to know you, your financial objectives and what matters most to you. This session will touch upon each of the following and more:

- Retirement Planning/Retirement Income Planning
- Fee-based Investment Advisory Services
- Estate Planning
- Risk Management Planning
- Cash Flow

11:00 a.m. - 11:30 a.m. Networking and Snack Break

11:30 a.m. - 1:30 p.m. State of the profession in Ohio - Town Hall Style (.2 CEU)

What is happening in the court reporting and captioning profession in Ohio? How does Ohio compare to the profession nationwide? Should Ohio consider certification, licensure and/or registration? What are the differences between the three? Has the reporter and/or captioner shortage affected you personally?

OCRA President Terri Sims, President-Elect Kelly Linkowski, Executive Director Sarah Nageotte, and all OCRA board members in attendance will bring you up to speed on OCRA's strategic planning discussions through a town hall style meeting. Bring your questions and comments to this interactive session.

1:30 p.m. - 2:30 p.m. Pre-Paint Social

As our painting partners prepare the room for our painting adventure, join your colleagues for a social hour in the hotel's lobby. *(Snacks and beverages provided)*

2:30 p.m. - 5:30 p.m. District D Social - Paint and Sip *(Refreshments available)*

*Separate registration required for paint and sip
Please see www.ocraonline.com for painting image and more information*

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JESSE W. HURST, II, CFP®, AIF®

Certified Financial Planner™, Accredited Investment Fiduciary®

Jesse specializes in providing customized investment management and retirement planning services to corporate and sales executives, medical professionals, and retirees. He is highly knowledgeable in the areas of investment portfolio management, retirement income planning, and estate planning.

After majoring in finance at the University of Akron, Jesse moved into the financial planning field in 1987. He worked with John Hancock for two years and then eight years with an independent financial planning firm in West Akron. In 1994, he earned the CERTIFIED FINANCIAL PLANNER™ designation. In 1997, Jesse, along with two other partners, formed Millennial Group to focus on helping people successfully pursue their retirement goals. In 2017, Jesse founded Impel Wealth Management, headquartered in Cuyahoga Falls, Ohio. In this endeavor, Jesse has formed an alliance with Horizon Wealth Management, a national firm based in Baton Rouge, Louisiana. Jesse will be leading the Investment Management Strategy arm of this national company. The clients of Impel Wealth Management will have the resources of more than 45 investment advisors and 18 affiliate offices standing behind them, overseeing over \$2 Billion of combined Assets Under Management. In June 2017, Jesse earned his ACCREDITED INVESTMENT FIDUCIARY® designation.

Jesse is a member of the Financial Planning Association and served as President of the Northeast Ohio Chapter. He is listed in Who's Who for Executives and Professionals. He has attended the annual Top Independent Advisor's conference by Barron's Magazine multiple times since 2010. In February of 2018, Jesse was honored to be named by Forbes Magazine as one of the Best-In-State Wealth Advisors for the State of Ohio. Jesse has served on Cetera Advisor's Presidents Advisory Council since 2004 and leads their Events and Education Committee.

Jesse's previous community service positions include President of the Board of Directors for Heart to Heart Communications, President of the Board of Open M Ministries, President of the Board of Weathervane Community Playhouse, Treasurer of the Board of Trustees of Cuyahoga Valley Christian Academy, President of the Board of the Stow-Munroe Falls Chamber of Commerce, and President of the Board of Cornerstone Community School. Jesse was also the President for Class 22 of Leadership Akron. He currently serves on the Professional Advisory Councils of both the Akron Community Foundation and the Akron Children's Hospital Foundation.

TERRI SIMS, RDR, CRR

Terri is OCRA's 2018-2019 President and is the Chief Court Reporter for Summit County Common Pleas Court. She has been employed by Summit County since 1994. Terri graduated from the Academy of Court Reporting in March 1984, and began reporting as a freelance reporter in Houston, Texas, having passed the Texas CSR while still a student in the 225 class. Following her year-and-a-half employment in Texas, Terri moved back home and began working at Fincun-Mancini in Cleveland. She has worked for various freelance firms in the Akron-Cleveland area, as well as teaching court reporting at the Academy of Court Reporting in Cleveland and Akron for a period of time, while raising her family.

KELLY LINKOWSKI, RPR, CRR, CRC, CPE

Kelly began her career in 1993. Still going strong after two decades in the profession, Kelly has been captioning and CARTing since 2003. She loves working from home and the flexibility captioning/CART provides so she can actively volunteer, have dinner on the table (or takeout!) for her loving husband of 19 years, juggle family demands, and still find time to hit the club to practice clay shooting. As a second-generation court reporter, Kelly is passionate about mentoring the next generation of reporters. She serves as OCRA's Student Relations Chair, in addition to being OCRA's 2018-2019 OCRA President-Elect.

SARAH NAGEOTTE, FAPR, RDR, CRR, CRC

Sarah is the Chief Court Reporter for the U.S. District Court, Northern District of Ohio. Sarah is a past Director of the Ohio Court Reporters Association and served on the NCRA Board of Directors from 2009-2016, serving as 2014-2015 NCRA President. She has extensive committee work at both the state and national levels, including, but not limited to, testing, students and education, officials, realtime, policies and procedures, finance, et cetera. Sarah has received the Ohio Court Reporters Association Distinguished Service Award, Diplomat Award, and Legislative Award; the Miami Jacobs Alumni Award; and was recognized as one of the "Top 5 Under 45" by the Ashtabula Area Chamber of Commerce. In 2017, she was inducted as an NCRA Fellow of the Academy of Professional Reporters.