

CELEBRATING 25 YEARS



Virtual Speaker Series: Poverty May 22, 2024, 12pm - 1pm via Zoom

Topics include:

- Financial foundations
- Retirement planning
- Health savings account
- Investments



Peggy Sullivan: Moderator

Peggy, a renowned keynote speaker, author, consultant, and researcher, has uncovered the damaging effects of busyness on health, happiness, and success. She's now sharing her solution worldwide, blending humor, heart, and honesty to help individuals and businesses escape the busyness trap. Her mission is to dispel the notion that "busy" equals success, enabling peak performance, self-care, and genuine happiness. Peggy's clientele spans from small teams to Fortune 500 giants like Google and Bank of America. Her upcoming book, "Beyond Busyness: How to Achieve More by Doing Less," details her actionable three-step "Busy Busting" method, which has transformed the lives of thousands.



Mary Kate Loftus:

Mary Kate, President of Impressia Bank, a division of CNB Bank, is dedicated to advancing women business owners and leaders. With a background in finance since 1999 and notable achievements, including Forbes recognition, she focuses on community growth and financial literacy. Impressia Bank, headquartered in Buffalo, prioritizes women's empowerment through innovative resources and personalized services. Operating initially in Pennsylvania and Ohio, it plans strategic expansion while offering access to CNB Bank's full-service branches. Loftus oversees customer experience and operations at Impressia Bank.



Ashley Sullivan:

Ashley, VP and Senior Wealth Partner at 1865 Wealth Advisors specializes in relationship-focused financial planning, emphasizing investment management. With a background spanning Rochester, NYC, Dallas, and San Diego, she managed a portfolio of \$800 million at Charles Schwab. Ashley is passionate about empowering women in finance, recognizing their pivotal role in wealth creation. She holds various prestigious designations and prioritizes continuous learning to optimize client outcomes. Outside work, Ashley enjoys time with her husband, a retired Navy SEAL, and their three children, exploring new destinations and outdoor adventures.



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