



Unlock Financial Success in 2024: Expert Insights from Tax, Finance, and Legal Pros

January 10, 2024
9:00am – 10:00am

Presented by The Lakewood Chamber of Commerce
in partnership with the City of Lakewood

Sponsored by Equitable Advisors



Moderated 3-Person Panel Discussion with Q&A

Steve Meka, Moderator

Michael Daso, Financial Advisor and Panelist

Patrick J. Ertle, Attorney and Panelist

Kevin Patno, CPA and Panelist





Moderator: Steve Meka

Steve Meka is the owner of STEM Handmade Soaps, a successful venture born out of a science experiment in Lakewood, Ohio. With a background in biochemistry, Steve, along with partner Dave, crafted an all-natural soap that garnered widespread acclaim. STEM's popularity led to an expansion of their product line and operations.

In addition to his entrepreneurial pursuits, Steve actively contributes to the local business community. He serves as a board member of the Lakewood Chamber of Commerce and holds the position of Vice Chair of the Education Committee within the chamber. Steve's commitment to business and education reflects his dedication to fostering growth and innovation within the community.



Panelist: Michael Daso, Financial Advisor

Michael, a seasoned Financial Planner with over 25 years of experience since entering the field in 1995, has dedicated over 22 years to Equitable Advisors, his current broker-dealer. His focus revolves around guiding professionals, small business owners, and retirees in aligning their personal goals and objectives through meticulous financial planning. Holding a Series 7 securities registration alongside life, health, and variable products licenses, he earned his Chartered Financial Consultant (ChFC) designation from The American College in 2000. Recognized in his company's Hall of Fame, Michael, a Denison University graduate with dual majors in Mathematics and Economics, resides in Lakewood, Ohio. Engaging actively in community service, he contributes as a Board of Directors member for the Beck Center for the Arts in Lakewood, following his prior roles as a board member and Chair for the Lakewood Historical Society and the Lakewood Chamber of Commerce, respectively. During leisure moments, he delights in running with his wife of 25 years, Amy, and partaking in disc golf and board games with their four children.



Panelist: Patrick J. Ertle, Attorney

Patrick J. Ertle, an attorney with over 30 years of experience in Ohio, specializes in business transactions, the nonprofit sector, and estate and succession planning. His expertise particularly shines in aiding businesses to craft robust succession plans ensuring seamless transitions and strategic outcomes. Residing in Lakewood with his wife Susan, Patrick finds joy in family moments with their four children and four grandchildren, while also nurturing a shared passion for travel.



Panelist: Kevin Patno, CPA

Kevin, a Certified Public Accountant and partner at Devries, Trifiletti & Loy, Inc. (Westlake), boasts 12 years of expertise in tax accounting. Specializing in aiding small to medium-sized businesses and individuals, he offers an array of services encompassing bookkeeping, payroll, financial statement preparation, tax planning, and tax preparation. His passion lies in collaborating closely with clients to devise effective tax strategies that curtail overall tax burdens. While currently residing in Rocky River with his wife and two children, he hails from Lakewood, having graduated from Lakewood High School. His academic journey led him to attain an undergraduate degree in finance from The Ohio State University and a Masters of Accountancy from Cleveland State University. Beyond tax season, Kevin relishes family time, sports, movies, and exploring new destinations through travel.

Thank you to our panelists, moderator, event sponsor and co-presenter

Michael Daso, Financial Advisor

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Steve Meka, Moderator and Lakewood Chamber of Commerce Board Member and Vice Chair, Education Committee

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Mike Daso



Cash Management

- Importance of Emergency Funds
- Checking, Savings, Money Market, CD's, Etc.
- Mid to Long Term Investments

Retirement Savings

- Personal
 - Traditional IRA
 - Roth IRA
- Employer Sponsored
 - SEP IRA
 - SIMPLE IRA
 - 401k

Business Continuation Planning

- Buy/Sell Agreements
- Key Person Life Insurance
- Personal Life Insurance

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Michael is a Financial Planner who has been in the business since 1995, and has been with his current broker-dealer, now Equitable Advisors, for over 22 years. Michael works primarily with professionals, small business owners and retirees to help them prioritize their personal goals and objectives through comprehensive financial planning.

Michael holds a Series 7 securities registration as well as his life, health and variable products (insurance and annuities) licenses. He also earned a Chartered Financial Consultant (ChFC) designation from The American College in 2000. Michael is a member of his company's Hall of Fame. Michael is a graduate of Denison University, where he double majored in Mathematics and Economics.

He lives in Lakewood, Ohio and enjoys giving back to his community through volunteering. He currently serves on the Board of Directors for the Beck Center for the Arts in Lakewood. Previously, he served on the Board of LakewoodAlive and was Chair of the Board for both the Lakewood Historical Society and the Lakewood Chamber of Commerce. In his spare time, he enjoys running with his wife of 25 years, Amy, and playing disc golf and board games with his four children.