Cooper's Accounting Service
Presents:

A One-day Conference Event For The Profit and Non-Profit Industries

Friday, February 11, 2011
8:00AM-6:00PM
Westin Hotel
Long Beach CA

Cooper's Accounting Service (CAS)

Where service exceeds expectation and delivers success

STEVEN D. COOPER
Accountant

Phone: 562.436.2600
Fax: 562.436.2611
Email: scooper@caspc.net
Website: www.caspc.net

555 East Ocean Blvd., (Suite 460)
Long Beach CA 90802

NOTES

What Does This Event Mean to Me?

TThis conference is the result of feedback I have received from my clients. I often speak to my clients about my team of trusted advisors, and how their valuable insight and assistance has helped my business to grow. Several clients have commented that they did not have a team of their own and would like the opportunity to talk to mine. As a result, I decided to host an event that introduces business owners to my team of trusted advisors and allows you to benefit from their knowledge in a wide variety of areas. This event is intended for you to have your voice heard ! As I told my team, this event is about the 3 I's: information, influence and integrity. The goal of this event is to give small business owners a competitive edge by providing you with proactive information you can immediately implement in your business. I am presenting my advisors to you in a town hall meeting atmosphere where you can interact with them, discuss the challenges you are facing, and to encourage you to network with other attendees.

This event is quite unusual because it brings the for-profit and non-profit industries together under one roof. I have my personal favorite topics, but if you ask me from week to week, my top five favorites change depending on the challenges I am facing.

The for-profit session starts with your personal credit. Building upon that leads us into establishing your business credit, and then you can visit your banker knowing that you are going get the credit you want at the best interest rate. Next, we will focus on growing your business with proactive marketing principles, including the importance of having a realistic, manageable marketing plan and enhancing your visibility with social media. We will discuss why contracts and business plans are critical for every business and what elements each should contain. We will also cover self-directed pension plans for your specific goals and how you can protect your dreams with the appropriate type of estate plan.

The non-profit session is primarily focused on your organization's structure. Correcting your infrastructure is the key. We will discuss how to be in compliance with funders and why this is so important for your non-profit, how your auditors can help your organization, how to implement your HR policies, and how to setup and maintain your accounting records.

This event is about giving you the information you need to make better business decisions and position yourself for growth in 2011. I believe that information is the "New Revenue" - quickly converting your ideas into income.

Remember, the speakers are not here to hear their own voices, but to hear yours. The event is about you, so please take advantage of it. This is the first of its kind; you will be a part of history.

Steven D. Cooper

Event Agenda

Non Profit
Salon D

Start Time	Session	End Time
8:00	**Open Remarks**	8:30
8:45	**Government Compliance/ Infrastructure**	9:30
9:30	*Q&A*	9:45
9:45	***Break***	10:00
10:00	**Email Marketing**	10:45
10:45	*Q&A*	11:00
11:00	***Break***	11:15
11:15	**Auditor's Finding**	11:45
11:45	*Q&A*	12:00
12:00	**Lunch**	1:15
1:15	**HR Findings and Labor Law Compliance**	2:15
2:15	*Q&A*	2:45
2:45	***Break***	3:15
3:15	**Non Profit Speaker Panel**	4:30
4:30	***Break***	4:45
4:45	**Non Profit Speaker Panel** *	5:30
5:40	**Closing Remarks**	6:00

*** Panel includes speakers from the Salon A 2PM session.**
- No portable recording devices are allowed during any of the sessions.
- Agenda is tentative and subject to change with notice.

Don Werno, Esquire

Don Werno, an award winning trial lawyer, is a dedicated and experienced attorney who aggressively advocates for his clients and who has a passion for helping people through the legal system. Don is more than an attorney, he's a mentor and a trusted advisor to his clients. Don is also the founding member of the Law Offices of Werno & Associates, a Professional Law Corporation based in Santa Ana, California. Don began practicing law more than a decade ago, following a highly successful career as a commercial pilot and computer consultant. Since that time, Don has successfully represented hundreds of satisfied clients in many types of cases, including: Business Formation, Drafting and Modifying Contracts, Contract Negotiation, Alternative Dispute Resolution (Mediation of Disputes), Business Litigation, Litigation Defense and the Purchase or Sale of Businesses and their Assets, including Business Aircraft. In addition to a law degree, Don has a Masters' and other degrees in Psychology, is a Commercial Pilot, Gold Seal Certified Flight Instructor and has more than 35 years of business experience.

Charles Williams

In his current position as Chief Financial Officer of Children and Family Futures (CFF), Charles manages the full scope of the company´s financial operations, including financial planning, financial analysis, and financial reporting.
At CFF, his efforts dramatically improved the company´s financial performance within the first year of his tenure. He also manages the accounting and information technology departments. His superior communication skills support exceptionally effective relationships with Federal partners, contractors, consultants, staff, and others involved in the company´s financial processes. His organizational skills and clarity in presenting complex financial concepts benefit Children and Family Futures on a daily basis. Prior to assuming his position at CFF, Charles served as the director of accounting and special sales controller for Home Base, Inc., a $1.5 billion enterprise. He has served as a senior manager and advisor on numerous finance, operations, accounting, and IT projects. He holds a Masters of Business Administration and a Bachelor of Science degree in finance.

Walt Zenda

Walt Zenda is a graduate of Pennsylvania State University with a Bachelor of Science in Chemical Engineering and Masters in Business of Administration from Virginia Commonwealth University. He has been practicing in a variety of industries such as aerospace, electronics, chemicals, and food since 1997. As a consultant, Walt has expanded into Healthcare, Financial Services, Retail and public institutions such as Los Angeles Unified School District and University of Southern California Libraries. He has conducted numerous training and consulting services as the essential part of food packaging plant's turn around. Walt has extensive experience and is highly qualified and trained to manage teams working in various transitional environments such as Banking and Financial Services. He is also a co-founder of a nonprofit located in Long Beach, CA.

David P. Ortiz

David P. Ortiz has been in the Financial and Estate Planning field for over 22 years. He has worked with over 3,900 families in that time, facilitating an Estate Plan or Financial plan for them. He has been licensed in the State of California since September 30, 1998 and is currently licensed with the state as a "series 65" Registered Investment Advisor (RIA). He currently has approximately $65 million of assets under management and services nearly 2,000 living trusts. His priority and specialty is to analyze each family and individual's needs to assess what method will best accomplish their goals. Each family is different and therefore each situation is different.

Hank Parker

Hank Parker is the managing Audit and Accounting Partner at Piazza, Donnelly & Marlette, LLP Certified Public Accountants ("PDM"). He joined PDM in January 2004 after twelve years with a top-ten public accounting firm. His responsibilities include the technical leadership and oversight of PDM's accounting and auditing department. His experience in public accounting includes a wide-range of businesses from small closely-held concerns to large banks and publicly traded multi-national companies. Hank is a CPA licensed in California, a member of the California State Society of CPA's, and a member of the American Institute of CPA's. He is a graduate of Seattle University with a Bachelor of Arts in Accounting and another in Humanities.

Stacie Warner

Stacie Warner is the CEO/Head Designer of SJordan Design LLC., a graphic design studio based in Oklahoma City, Oklahoma. Her 14 years of experience as a graphic designer has encompassed all aspects of print and web design, ranging from brainstorming of ideas to final print production and production management. She has produced numerous high visibility design products for government, non-profit and private sector organizations, including brochures, catalogs, annual reports and posters, which are currently in distribution worldwide.

Willie Washington, Jr.

Willie Washington, Jr., is the owner of Trinity Capital Investment Group, Inc., a loan processing center which successfully completes 30-40 loans per month. Willie has designed and implemented a marketing strategy to consistently increase monthly production and maintain productivity levels, with minimum affect from market changes. Willie has developed training materials for loan originators at every level of experience, from novice to veteran. Services include Strategic & Operational Planning, Business Process & Strategy Development, Marketing Analysis, and Joint Ventures & Strategic Partnerships. Willie earned a Bachelor of Science in Electronic Engineering.

Event Agenda

For Profit
Salon B

Start Time	Session	End Time
8:00	**Open Remarks**	8:30
8:30	**Personal Credit**	9:00
9:00	*Q&A*	9:15
9:15	***Break***	10:15
10:15	**Business Credit**	10:45
10:45	*Q&A*	11:00
11:00	***Break***	11:15
11:15	**Lending**	11:45
11:45	*Q&A*	12:00
12:00	**Lunch**	1:15
1:15	**Marketing/ Social Media**	2:00
2:00	*Q&A*	2:30
2:30	***Break***	2:45
2:45	**Personal Credit Breakout**	4:00
4:00	***Break***	4:15
4:15	**Marketing/Social/ Email Breakout**	5:30
5:30	***Break***	5:40
5:40	**Closing Remarks**	6:00

- No portable recording devices are allowed during any of the sessions.
- Agenda is tentative and subject to change with notice.

Event Agenda

Breakout Sessions
Salon C

Start Time	Session	End Time
8:00	**Open Remarks**	8:30
8:45	**Contracts**	9:45
9:45	*Q&A*	10:15
10:15	***Break***	10:30
10:30	**Business Plan**	11:30
11:30	*Q&A*	12:00
12:00	**Lunch**	1:15
1:30	**Estate Planning/ Self-Directed/ Pensions**	2:30
2:30	*Q&A*	3:00
3:00	***Break***	3:15
3:15	**Business Credit/ Lending Breakout**	4:00
4:00	***Break***	4:15
4:15	**Lending**	5:30
5:30	***Break***	5:40
5:40	**Closing Remarks**	6:00

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George Cole

George Cole is the current President and co-founder of National Credit Educational Services. George worked for VR-Tech's Marketing group where he first started to help people get their credit back on track and to secure mortgages and auto loans. His mission: to create credit equality and redemption for those who have been abused by the system, and to provide education that can free them from a lifetime of bad debt. He has helped many Americans across the nation to restore municipalities, counties, local, and state sectors by educating people about the travesties of bad credit.

Kelly Flint

Kelly is Constant Contact's local small business expert in the Los Angeles area . A knowledgeable marketing expert, Kelly has helped thousands of small businesses, associations, and nonprofits develop and implement effective email marketing and online survey strategies. A popular speaker and educator, Kelly gives small businesses and nonprofits the tools, techniques and strategies they need to grow and expand their business and to maximize the power of relationship marketing.

Clinton A. Lewis, Sr.

Clinton A. Lewis, Sr. is the Managing Partner and Co-Founder of Felton & Lewis Financial Group. Clinton oversees all of the firm's operational engagements and utilizes his considerable experience to guide numerous clients in their financial affairs. Clinton has over 15 years of financial consulting experience and expertise in financial planning, wealth management, organizing client portfolios, and business consulting and valuations. He began his career in 1992 as a Regional Vice President at Primerica Financial Services, Inc. until 1999 and then Co-Founder Felton & Lewis Financial Group and its holdings.

Stella Oefinger

Stella Oefinger, owner of Bedrock Marketing, has a distinctive blend of marketing acumen and relationship ties in the community. Her instinctive sense for building rapport with business owners and upper-level management, allows her to work with organizations with revenues ranging from $1–$20 million. Her communication expertise ranges from newsletter articles, online mass emailing, white papers, bios and web site Search Engine Optimization. Her favorite tools to help clients reach their goals include designing and developing customized web sites coupled with creating online brands with LinkedIn and Facebook. Stella earned a Bachelor of Business Studies degree with a major in marketing. With over 15 years of professional industry experience, Stella has been active in several groups including the Association for Accounting Marketers, American Marketing Association and various marketing groups that she has led.

Speaker Biographies

Keith Baumgarn

Keith Baumgarn is the Director of Advanced Sales, Pacific Region of Penn Mutual. Keith has over 30 years experience in pension and retirement planning and as marketing vice president for a major life insurance company's retirement plans operations. He is a nationally recognized speaker on EGGRA,The Pension Protecting Act, Qualified Retirement Plans and how effectively to incorporate Life Insurance inside of Qualified Plans. He is an approved course instructor provider for agent CE, CPA, CPE, Attorney CLE, EA and CFP workshop courses. Keith is also an author of retirement planning articles in two national magazines.

Don Berkman

Don Berkman heads up Sales Operations and Training for Dun & Bradstreet Credibility Corp. Don started his D&B career 23 years ago, as a business analyst writing credit reports on small businesses. In 1989, Don piloted the introduction of products to help businesses improve their credit standing. At age 27, he became the youngest District Manager of D&B's New York City office in the company's history. He has held an impressive variety of product and marketing leadership roles at D&B: managing the online update site for small businesses; supervising the product road map for D&B's self-awareness solutions product line; and heading up global marketing of this product line during its introduction in Canada, Italy and the United Kingdom. He is a two-time winner of D&B's Presidential Citation Award and the 2006 winner of D&B's Customer Quality Award. Now, as Director of Sales Operations and Training for D&B Credibility Corp., Don directs a work force of more than 300 team members offering solutions to help small business owners build their credibility and secure credit and funding to grow their businesses. Don graduated Cum Laude from Rutgers University and holds a Bachelor of Science degree in Business Economics.

Anthony Bozanic

Anthony is a graduate of the University of California at Santa Barbara with a Bachelor of Science in Business and Accounting and has been practicing in the accounting industry since 1988 and has been a Certified Public Accountant since 1991. He began his career in the audit department of KPMG Peat Marwick. Anthony has completed numerous seminars and training courses in non-profit audit related matters and is qualified to conduct audits in compliance with Government Auditing Standards and the requirements of circulars promulgated by the Office of Management and Budget. He also has extensive experience with the SEC and 1934 Act Filing and audits of commercial enterprises. Anthony is a member of the American Institute of Certified Public Accountants and the California Institute of Certified Public Accountants. Anthony is active in the community, serving as treasurer of the non-profit organization "Institute of Multi-Cultural Counseling and Education Services."

Event Agenda

Lunch
Salon A *

Start Time	Session	End Time
8:00		8:30
8:45		9:30
9:30		9:45
9:45		10:00
10:00		10:45
10:45		11:00
11:00		12:00
12:00	**Lunch**	1:15
1:30		2:00
2:00	**Contracts/ Business and Estate Planning/ Self-Direct Pension**	3:00
3:00		3:30
3:30		4:15
4:15	**Business Credit**	5:30
5:40	**Closing Remarks**	6:00

*** Salon A will be closed in the morning session, this is based upon the weather (rain).**
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Excellence is our pledge…

Piazza, Donnelly, Marlette, LLP ("PDM") Certified Public Accountants, a full-service accounting and tax compliance firm, is one of the largest public accounting firms in the South Bay and ranked among the largest 50 in Los Angeles County.

Headquartered in Torrance with offices in Torrance and San Pedro, our firm specializes in accounting, auditing, and tax compliance services to closely held business, high net worth individuals, and nonprofit entities.

Our emphasis on serving the needs of our family of clients permeates all levels of our organization. Piazza, Donnelly, & Marlette is committed to serving long-term relationships and building a business relationship with our clients.

Our six partners and nearly thirty associates are committed to the success of our client relationships, which results in a stable and secure accounting practice. Our firm currently provides tax, business consulting, and audit & accounting services to a client base ranging from start-up operations to multi-location corporations with over $250 million in revenues. Our clients have one common thread: they are closely held and managed by entrepreneurs.

Our pledge to excellence and dedication to client service has brought our firm, our affiliate network, and our client relationships great success.

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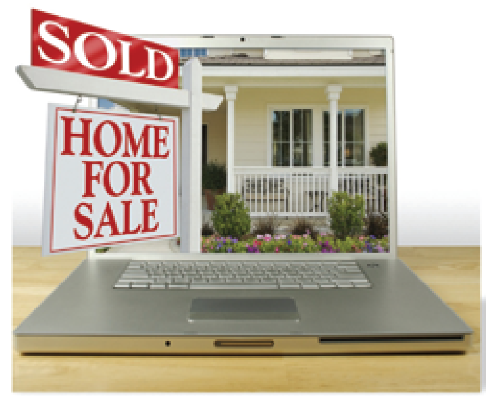

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Phone: 562-436-4300 | Fax: 562-252-1114
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