

## **2010 News and Press Releases**

### **November**

**FSU's Newest Professional Advisory Board Member**-Lakeland, FL-November 11, 2010-**James Luffman, CPA/PFS**, Partner of **CPS Investment Advisors** was appointed to the Professional Advisory Board (PAB) for Florida State University, College of Business, Department of Accounting. The purpose of the PAB is to improve the education of FSU students by enhancing communication between the faculty and members of the accounting profession. The PAB is considered to be a window to the profession and meets to share and exchange information about goals, programs, and changes in the business environment. The Professional Advisory Board is comprised of business leaders throughout the nation. James received his Bachelor of Science degree majoring in Accounting from Florida State University.

**Chas P. Smith, CPS/PFS, James M. Luffman, CPA/PFS and Peter C. Golotko, CPA/PFS, MBA**, Partners of **CPS Investment Advisors**, hosted the 14<sup>th</sup> Annual *CPAlliance*<sup>TM</sup> Roundtable, held November 6-8, 2010 at Marco Beach Ocean Resort, Marco Island, Florida. The event was attended by Members of *CPAlliance*<sup>TM</sup> with over 50 CPA Wealth Advisory firms, managing \$430 million in assets. The *CPAlliance*<sup>TM</sup> Network's mission is helping clients identify their strategic financial goals, guiding them in the process of wealth accumulation and achieving financial independence. Topics discussed at the Roundtable included advanced personal financial planning for the CPA Wealth Advisor and an economic/market forecast.

**Chas P. Smith, CPA/PFS**, chief investment officer of CPS Investment Advisors, was a guest speaker at the Florida Institute of CPA's (FICPA) Estate & Financial Planning conference in FT. Lauderdale. His topic was "Taking the Duct Tape Off Your Portfolio."

### **October**

**Derek Oxford**, Portfolio Trader with CPS Investment Advisors recently attended the IShares Advisor Forum in San Francisco. Less than 1% of the Advisors in the country were invited to attend this private session. Topics of discussion were ETF construction, Economic Insight, and Market changes.

### **September**

**Gary Clark**, a retired Air Force colonel who is now with CPS Investment Advisors recently participated in a due diligence review of Vanguard and T Rowe Price, in Philadelphia and Baltimore respectively, as a member of the investment committee of the Military Officers' Association of America board of directors. He also participated in the two-day mid-year July meeting of the MOAA board of directors in Washington, D.C. He also attended the MOAA Chapter Presidents' Symposium in Jacksonville from Sept. 16-18.

**Michael L. Lawton, MPA/CPM**, Financial Advisor, with CPS Investment Advisors, recently attended the Federal Bureau of Investigation - National Academy Associates, FBINAA Florida Chapter 2010 Annual Training Conference in Clearwater Beach, Florida. Michael is a FBINAA graduate (155<sup>th</sup> Session) and a

retired law enforcement officer, having served 37 years in the law enforcement profession with the Polk and Hillsborough County Sheriff's Offices. Michael provided financial and retirement income planning guidance to conference attendees.

## **August**

**Chas P. Smith**, CPA/PFS, president of CPS Investment Advisors was a guest speaker at the FICPA (Florida Institute of CPA's) Financial Planning conference in Tampa. His topic was "Importance of Dividends in Stock Investing."

**Gary Clark**, CPS Investment Advisors, Director of Institutional Retirement Plans attended the annual Morningstar Investment Conference held in Chicago. Major investment personalities addressed attendees during the two day event.

## **July**

**Gary Clark**, CPS Investment Advisors, Director of Institutional Retirement Plans, was re-elected to the seven member Board of Directors of the Florida Public Pension Trustees' Association at the association's annual conference. The FPPTA provides education for the public pension plan trustees of over 250 utility, municipal, firefighter and police officer retirement plans. Approximately 700 trustees and service providers attended the event held in Naples, Florida.

**Michael Riskin**, CPA/PFS, CFP®, MST, Director of Taxation at CPS Investment Advisors, has recently been issued the Personal Financial Specialist credential. The PFS is the financial planning specialty credential issued by the AICPA exclusively to qualified CPA's with proven expertise and experience in comprehensive personal financial planning.

**Chas P. Smith**, CPA/PFS, president of CPS Investment Advisors, attended a two day investment forum at the Harvard University Faculty Club, Boston, MA. Professors from Harvard University business school presented topics on multi asset allocation and alternative investments strategies.

**Michael L. Lawton**, MPA/CPM of CPS Investment Advisors was a guest speaker at the Hillsborough County Sheriff's Office – 2010 Annual Employee Benefit/Education Fair. His topic was "Retirement Income Planning and Florida Retirement System Legislative Issues".

CPS Investment Advisors is pleased to welcome our newest team member. **Tony Corrao** has joined CPS Investment Advisors as a Portfolio Trader. He came to us from a manufacturing firm analyzing financial statements and working on account reconciliations. Tony has a BS in Finance from Florida State University and plans to utilize his past experience in his new role at CPS Investment Advisors.

## **June**

**Peter C. Golotko**, CPA/PFS, MBA of CPS Investment Advisors recently attended the National Advisors Trust Annual Shareholders and Operations Conference. CPS Investment Advisors is a shareholder of National Advisors Trust. The 3 day event was held in Naples, Florida.

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**Chas P. Smith**, CPA/PFS, president of CPS Investment Advisors, was a guest speaker at the annual Florida Dental Convention at the Gaylord Palms Resorts in which 1,000 Florida dentists attended. His topic was Financial Planning for Dentists.

**Peter C. Golotko**, CPA/PFS, MBA, partner at CPS Investment Advisors and **Esther A. Barnette**, Supervisor recently attended the National Regulatory Services conference in Fort Lauderdale, FL. The 25<sup>th</sup> Annual conference was on "Investment Adviser and Broker-Dealer Compliance".

### **May**

RETIRED U.S. AIR FORCE COL. **GARY CLARK**, of CPS Investment Advisors, met with congressional representatives from Florida to discuss national security issues and pending legislation. He is a member of the board of directors of the Military Officers Association of America.

**Michael Riskin**, CPA, CFP® recently spoke at Southwest Middle School as part of the FICPA's *Feed the Pig Campaign Tweens* to promote financial literacy. Michael is the Director of Tax at CPS Investment Advisors in Lakeland.

**Chas P. Smith**, CPA/PFS, President of CPS Investment Advisors attended the Fidelity Investments Executive Forum in Naples, FL. The forum was attended by top portfolio managers and registered investment advisors from around the country.

### **April**

**CPS Investment Advisors** recently sponsored the Lakeland Chamber of Commerce Business and Breakfast held at the Grasslands Country Club. The speaker was Dr. Robert H. Tate, Ph.D. of Florida Southern College and his topic was "Business Etiquette."

### **March**

**Chas P. Smith**, CPA/PFS was the keynote speaker at the 4<sup>th</sup> Annual Economic Forecast and Stock Market Update for CPS Investment Advisors. Dr. Claus te Wildt, Vice President of Fidelity Investments Research, was the second speaker. Over 100 investors were in attendance at the Lakeland Yacht & Country Club.

**Gary Clark**, Director of Institutional Retirement Plans, attended a three day Florida Public Pension Trustee Association sponsored Education and Certification program for new Public Pension Plan Trustees in Jacksonville. The program was attended by over 400 participants.

### **February**

**Michael Riskin**, CPA,CFP®,MST, head of the Tax Department at CPS Group CPA's was a guest speaker at the Polk Chapter of the FICPA. His topic was " Roth IRA Conversions.....What's it all about?"

**January**

**Peter C. Golotko**, CPA/PFS,MBA of CPS Investment Advisors was a guest speaker at the 2009 CPAlliance Roundtable held in Celebration, FL. His topic was "Regulatory Compliance in the Current Investment Arena"/

**CPS FIRST THURSDAY** is 4 p.m. Feb. 4 at Florida Southern College, Carlisle Rogers Building of Business and Economics. Free and open to the public. Kathryn Koch-O'Malley of Lanier Upshaw will speak on property and casualty insurance. Make reservations at 863-688-1725 or [barbara@cpalliance.com](mailto:barbara@cpalliance.com).