

December 2009

Gary Clark, Director Institutional Plans, CPS Investment Advisors, conducted a three day certification program for new public pensions plan trustees in Bonita Springs. The education program is sponsored by the Florida Public Pension Trustee Association.

November 2009

Bryan Mau, Regional Director of Retirement Services for CPS Investment Advisors was selected 2009 New Resident "Who's Who of Central Florida". Bryan was selected for his numerous hours volunteering for many different not-for-profit organizations and serves on several boards in the area. Bryan Mau joined CPS Investment Advisors in September of last year after he and his family relocated from New Hampshire.

Michael A. Riskin, CPA, MST of CPS Group CPA's, recently passed his Certified Financial Planner exam. Michael is the Tax Manager of the firm and is currently in the process of obtaining his Personal Financial Specialist certification as issued by the AICPA.

Chas P. Smith, CPA/PFS, president of CPS Investment Advisors, was a keynote speaker at the 15th annual CPAlliance Roundtable conference held in Celebration, Florida. His topic was "Investment Opportunities for 2010 and 2011."

October 2009

After several months of work and the efforts of all our staff, we are proud to announce that we at CPS Investment Advisors have totally redesigned our company website! Our vision has always been to better serve our clients, prospects, business partners and community. The new site has countless features including a continuous stock market update, Current Headlines, a link to our Saturday Radio Program, and News and Events.

September 2009

CPS Group CPA's, PA is pleased to announce that **TyAnn Baity** has joined the firm as Senior Tax Accountant. TyAnn has a background in public accounting as well as the private industry. TyAnn has over 10 years of experience in the accounting industry. TyAnn graduated from Temple University in 2001 with a degree in Accounting. She is currently pursuing her CPA license.

August 2009

Bryan Mau of CPS Investment Advisors was a guest speaker for the Kiwanis in Bartow, FL. His topic was "Saving Starts with you"

Gary Clark, CPS Investment Advisors, Director of Institutional Retirement Plans, was elected Vice-Chairman of the Florida Public Pension Trustees Association at the organization's annual conference held in Boca Raton, Florida. The four day conference featured professionals from the investment, pension and financial management arenas. The event was keynoted by Alex Sink, Florida's Chief Financial Officer.

CPS Group CPA's, PA is pleased to announce that **Jorge Rivera** has joined the firm as Staff Accountant. Jorge comes to the firm from San Francisco where he worked in public accounting with a background in accounting and tax for small to medium sized companies. Jorge graduated from Florida Gulf Coast University in 2007 with a degree in Accounting. He is currently pursuing his Master's in Taxation.

Peter C. Golotko, CPA/PFS, MBA of CPS Investment Advisors was a guest speaker at the Florida Accounting and Business Expo in Orlando, FL. His topic was “Annuities”.

July 2009

Michael A. Riskin, CPA, CPS Group, CPA’s attended the FICPA FAB Expo in Orlando, FL. Riskin is Tax Manager of the firm.

Gary Clark, Director Institutional Retirement Plans, CPS Investment Advisors was invited to participate in the Macroeconomics Advisors’ Quarterly Economic Outlook meeting in St. Louis. Participants represented a broad cross-section of US and foreign government agencies in addition to private entities involved in economic forecasting.

Peter C. Golotko, CPA/PFS, MBA of CPS Investment Advisors recently attended the National Regulatory Services conference in Orlando, FL. The conference was on “Regulations in the Investment Industry”.

June 2009

Gary Clark, CPS Investment Advisors, Director Institutional Retirement Plans, participated in the Morningstar Investment Conference 2009 in Chicago, Illinois. Participants were able to discuss economic and political developments impacting the investment industry with John Bogle of Vanguard, Bill Gross of PIMCO and other high profile investment notables at the May event.

James M. Luffman, CPA/PFS, CPS Investment Advisors was a guest speaker at the FAB Expo in Orlando, FL. His topic was “Capital Markets Update.”

Frank M. Ashley, III, CPA/PFS, CPS Investment Advisors was a guest speaker at the Florida Accounting and Business Expo in Orlando, FL. His topic was “Stock and Bond Market Forecast.”

CPS Group CPA’s, PA is pleased to announce that **Stephanie Stewart** has been hired as a Staff Accountant with the firm. Stephanie has interned with the firm for the past three years. She is a recent graduate of Florida Southern College with a degree in Accounting and Sports Management.

CPS Investment Advisors is pleased to announce that **Peter C. Golotko**, CPA/PFS, MBA, Partner and **Bryan G. Mau**, Regional Director of Retirement Plan Services now host a call in talk show on Channel 1430 AM on Saturdays from 9 AM – 10 AM with Peter Maris and Robby Sampson of Loan Finders. The show “Table Talk” focuses on Financial Planning Investments, Insurance and Mortgage Programs with Loan Finders. You are welcome to email questions to info@1430tabletalk.com and they will be discussed on the show.

April 2009

Chas P. Smith, CPA/PFS, president of CPS Investment Advisors sponsored an Economic Forecast and Stock Market Update at the Lakeland Yacht & Country Club.

Michael L. Lawton MPA/CPM, Financial Advisor, recently passed the Series 65 Uniform Investment Advisor Law Examination and is an Investment Advisor Representative with CPS Investment Advisors. Michael is retired from the law enforcement profession after 38 years and specializes in retirement income planning for government sector employees. His areas of

concentration are the Florida Retirement System (FRS), FRS Deferred Retirement Option Program (DROP) and 457b Deferred Compensation rollovers.

February 2009

Chas P. Smith, CPA/PFS, president of CPS Investment Advisors was a guest speaker for the Florida Public Pension Plan Trustee School in St. Augustine, FL. His topic was “Basics in Stock Investment.”

January 2009

Chas P. Smith, CPA/PFS, president of CPS Investment Advisors was a guest speaker at the FICPA Estate & Financial Planning conference in Ft. Lauderdale. His topic was “Top 10 Tax Tips for Investors.”

Holly D. Kelley, CPA, of CPS Group CPAs, PA in Lakeland, was a guest speaker at the January meeting of The Insurance Professionals of Polk County. Her topic was “Why Do I Need a Budget.”