Cornerstone Wealth Management, LLC

List of Past Cornerstone Events

If you would like further information on any of our past events, please feel free to contact our office at (858) 676-1000.

Common Sense Selling (Educational Roundtable**)**
September 28, 2010
Location: California Office
Speaker: John Schumann

John is a partner in the Whetstone Group, is a well-known speaker, and the co-author of two books, *The Monday Morning Sales Coach* and *Common Sense Selling*. If you are in business and need to “sell” without “selling” or being perceived as the salesperson, this is the course for you.

In this roundtable, John will discuss selling and persuasion skills for the "non-selling" professional. It is designed for bankers, CPA’s, attorneys, advisors, and anyone who works with clients. John will also share sales anecdotes from his real life experience with major corporations and corporate boards. What you will learn:

- How to leave a lasting impression in the first 20 minutes
- How to build value and differentiate yourself from competition while increasing your fees
- How to eliminate the “premature presentation,” diagnose problems, and position solutions
- How not to look like a salesperson

Common Sense Selling (Educational Roundtable**)**

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Don't Wait to Buy Land, Buy Land and Wait (Manager Showcase**)**

August 26, 2010
Location: California Office
Speaker: Andrew H. Martin

Ongoing turmoil in the real estate markets and among financial institutions continues to present unprecedented opportunities for savvy investors. ARCUS Private Capital Solutions, LLC, a private company with expertise in real estate equity investments, is capitalizing on this environment. Many of Cornerstone's clients are invested with ARCUS. ARCUS's current funds focus on distressed real estate and real estate notes. Please join us as Andrew, principal of ARCUS Capital, shares his insights on:

- Today's real estate market
- The window of opportunity for ARCUS's current investments
- How ARCUS identifies future opportunities
- An update on the ARCUS real estate equity funds

Don't Wait to Buy Land, Buy Land and Wait (Manager Showcase**)**

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Investing in Global Energy Markets: Exploration and Opportunity (Manager Showcase)

July 20, 2010
Location: California Office
Speaker: William J. Buechler

Bill is President of Buechler Capital Asset Management, LLC. He is also general partner of the Kiwi-Pacific, LP, which focuses on energy related investments in Australasia, a region consisting of Australia, New Zealand, New Guinea, and neighboring Pacific islands. The fund is an underlying investment in Capstone Partners, LP, a fund of funds in which many of our clients are invested. As oil exploration has been front page news with the recent Gulf disaster, Bill will share his current perspective on the global energy markets. He will also explore the investment opportunities found in the growing energy and natural resources markets of Australasia, including:

- The political, economic, and global consequences of the BP spill on gas and oil exploration
- How the Sovereign Debt Crisis makes Australasia more attractive to US investors
- Why the following geographic areas offer attractive investment opportunities:
  - Australia: The Asia-Pacific leader for natural gas?
  - New Zealand: Floating on a sea of oil?
  - Singapore: The "Houston of the East"?

Investing in Global Energy Markets: Exploration and Opportunity (Manager Showcase)

July 13, 2010
Location: Arizona Office
Speaker: William J. Buechler

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- How the Sovereign Debt Crisis makes Australasia more attractive to US investors
- Why the following geographic areas offer attractive investment opportunities:
    - Australia: The Asia-Pacific leader for natural gas?
    - New Zealand: Floating on a sea of oil?
    - Singapore: The “Houston of the East”?

Will California Munis Get Scorched by a “Greece” Fire? (Manager Showcase)

June 17, 2010
Location: California Office
Speaker: Len Templeton

Join our discussion with Len Templeton, President of Templeton Financial Services and an independent, fixed-income-only money manager, on this timely topic. Based on his long experience of investing in bonds, Len will discuss:

- How California and Muni's will be affected by the federal deficit and predicted higher taxes
- What lessons we can learn from the Vallejo, California, municipal bankruptcy in 2008
- California's budget and whether its munis are safe
- Fixed income strategies for investing in California bonds in today's market

Will Arizona Munis Get Scorched by a "Greece" Fire? (Manager Showcase)

June 9, 2010
Location: Arizona Office
Speaker: Len Templeton

Join our discussion with Len Templeton, President of Templeton Financial Services and an independent, fixed-income-only money manager, on this timely topic. Based on his long experience of investing in bonds, Len will discuss:

- How Arizona and Muni's will be affected by the federal deficit and predicted higher taxes
- What lessons we can learn from the Vallejo, California, municipal bankruptcy in 2008
- Arizona's budget and whether its munis are safe
- Fixed income strategies for investing in Arizona bonds in today's market

IRA Conversions: Till Death Do Us Part (Educational Roundtable)

May 26, 2010
Location: California Office
Speaker: Chris L. Meacham, CPA, PFS

During Chris' presentation he will address powerful strategies relating to IRA conversions that, when implemented correctly, could significantly enhance the value of your estate. Additionally, he will explain in simple terms the complex issues surrounding this 2010 hot topic so you walk away with answers to the following questions:

- Should I consider an IRA conversion?
- If I am a candidate, do I convert all of it or just a part of it?
- If I do convert, what is the best investment strategy for a Roth IRA?
- What is the impact of my conversion on my heirs?

Why "Broken Subdivisions" Will Be Fixed First in a Market Turnaround (Manager Showcase)

April 29, 2010
Location: Arizona Office
Speaker: James Breitenstein and Sean Masterson

Landsmith, LLC, is currently acquiring finished residential lots in California. Based on their broad experience in land development and home building, they will discuss the current and future outlook for real estate in California including:

- Why buying "broken" subdivisions has exceptional potential for return on investment
- How the real estate crash has changed strategies used by developers and how Landsmith is taking advantage of those changes
- What a turn around in the real estate market will look like
- How the downturn will affect the major players in the industry (developers, builders and the buyers) going forward

Why "Broken Subdivisions" Will Be Fixed First in a Market Turnaround (Manager Showcase)

April 27, 2010
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- What a turn around in the real estate market will look like
- How the downturn will affect the major players in the industry (developers, builders and the buyers) going forward

How to Generate Income in a Flat Market (Educational Roundtable)

March 25, 2010
Location: Arizona office
Speaker: Gary Stringer

We are pleased to welcome Gary, co-founder of Ironwood Asset Management, LLC, who will present How to Generate Income in a Flat Market. Based on his experience in managing fixed income portfolios for governments, high net worth and institutional clients, he will discuss:

- Taking advantage of volatility through option strategies
- Using options to generate income and protect against losses
- Understanding how implied volatility and future volatility affect traders
- Utilizing income to enhance yield

The Journey from Private to Public (Manager Showcase)

March 18, 2010
Location: California office
Speaker: A.J. Kazimi

A.J. is the Founder, Chairman and CEO of Cumberland Pharmaceuticals. Many of Cornerstone's clients began investing in Cumberland in 2001 when it was a start up private equity company. The investment was extremely successful; Cumberland went public in August of 2009.

Before Cumberland, A.J. helped Therapeutic Antibodies Inc. navigate from its start-up phase through its IPO. Please join us as he shares the highlights and his insights on:

- The IPO journey
- The challenges Cumberland faces as a public company
- Investment opportunities in biopharmaceuticals

Finding the Needle in the Real Estate Haystack (Educational Roundtable)

February 17, 2010
Location: California office
Speaker: Andrew Martin

The recent troubles in both the real estate markets and among financial institutions continue to present unprecedented opportunities for savvy investors. ARCUS Capital, LLC, a private company with expertise in real estate equity investments, is capitalizing on this environment. Many of Cornerstone's clients have invested with ARCUS for the past several years. ARCUS's current funds focus on distressed real estate and notes. Please join us as Andrew Martin, principal of ARCUS Capital, shares his insights on:

- Investing in real estate or note purchases from Banks and the FDIC
- A perspective on the current real estate market
- The timing of this opportunity, including how long it might last
- Where the future opportunities might be
- An update on the ARCUS real estate equity funds

IRA Conversions: Till Death Do Us Part (Educational Roundtable)

February 14, 2010
Location: Arizona office
Speaker: Chris Meacham

Chris, President and CEO of Cornerstone Wealth Management, will present “IRA Conversions: Till Death Do Us Part”, at our February Roundtable. He will address powerful strategies relating to IRA conversions, that when implemented correctly, could significantly enhance the value of your estate. Additionally, he will explain in simple terms the complex issues surrounding this 2010 hot topic so you walk away with answers to the following questions:

- Should I consider an IRA conversion?
- If I do convert, what is the best investment strategy for a Roth IRA?
- Where he believes the real estate market is heading
- What is the legacy impact of my conversion?

Real Estate—The Silver Lining (Manager Showcase)

January 1, 2010
Location: Arizona office
Speaker: Andrew Martin

Andrew is the principal of ARCUS Capital, LLC, a private equity lending company with expertise in real estate equity investments. Join us as he explores today's real estate market, including some of its most compelling investment opportunities. He will discuss:

- The success of ARCUS in producing positive returns in a negative market
- How to take advantage of distressed bank notes
- Where he believes the real estate market is heading

Will the Economy Recover in 2010 (Educational Roundtable)

January 13, 2010
Location: California office
Speaker: Alan Nevin

Alan Nevin is considered the "Dean of Real Estate Feasibility Research" in Southern California. His 30-year background in demographic and economic research places him among the educational and analytical leaders in his field. Mr. Nevin holds advanced degrees from Stanford and American University. Mr. Nevin will peer into his crystal ball and provide his outlook of what we might expect in 2010, including:

- California jobs and unemployment levels
- Interest rates
- Residential real estate -- is it in recovery?
- Commercial real estate -- is the worst yet to come?
- Inflation

Financing Real Estate: Show Us the Money

December 16, 2009
Location: California office
Speaker: Dr. Riedy

Dr. Riedy is a former COO of Fannie Mae, has served on the boards of public and private real estate companies and has been selected for leadership positions in several industry groups. He currently serves as Chairman of the Board for Neighborhood Bancorp and is Executive Director of the Burnham-Moores Center for Real Estate at the University of San Diego. Join us as he uses his insights and expertise to explore many of today's pressing issues, such as:

- When will the banks start lending again?
- What is the prognosis for "recovery" in commercial, apartment, retail and housing markets?
- How healthy is the FDIC and how does it affect lending?

Investing in Fixed Income Portfolios for the "New Normal" World

December 8, 2009
Location: Arizona office
Speaker: Kevin Winters, CFP, CIMA

Kevin is a vice president and account manager for Pacific Investment Management Company (PIMCO). Kevin will share his perspective from the arena of fixed income on such major developments as a new administration in Washington, continuing instability in the markets, and a challenging real estate market. Join us as he highlights PIMCO's outlook for the economy and discusses:

- What impact tighter government policy might have on fixed income
- Results of massive monetary and fiscal stimulus on the U.S. dollar
- A comparison of the housing and consumer markets, as each sector continues to de-leverage its balance sheet

Opportunities in Residential Real Estate

November 11, 2009
Location: Arizona office
Speakers: Scott McWhorter and Ritesh Patel

Come and join us as Virtu Investments, a company we have used to invest in real estate over the past 10 years, shares its insights on buying single family homes at unprecedented values. They will talk about their new fund and will focus specifically on the following topics:

- What is the general state of today's real estate market?
- How can investors take advantage of the numerous home foreclosures?
- What motivates banks?
- What is the liquidation process for single family homes?

Unique Investment and Wealth Planning Opportunities in a New Administration

November 12, 2009
Location: California office
Speakers/Panel: Chris Meacham, CPA, PFS, Scott Hinkle, David Jacobs, Mark Morris, & Timothy Polacek

Today's economic environment holds both peril and promise. As this historic year draws to a close, it's time to address both the challenges and opportunities of the future. Wealth creation, preservation, and protection have seldom been more critical. Please join us as we explore strategies that can empower you to navigate more successfully in the year ahead, such as:

- What's new in Washington, D.C., and how will it impact you?
- Today's once-in-a-lifetime investment opportunities
- Hidden planning opportunities for your IRA or Roth IRA
- How to add significant flexibility to your estate plan
- Protection against the inevitable: inflation

Untapped Opportunities to Acquire Operating Businesses

November 11, 2009
Location: California office
Speakers: Ray DiMuro, CFP & George Collett, CFP

Private equity funds present an excellent opportunity for investors to diversify their portfolios and increase returns. When it comes to identifying investment opportunities, managers in the private capital markets do not face the high levels of restrictions that are found in the public capital markets. As a result, private equity funds have more flexibility to address a volatile market and can target higher returns than public funds. Join us as Ray and George discuss:

- Identifying and investing in small businesses that have solid cash flow and growth
- Increasing profitability through active business management
- Creating effective exit strategies for private equity investments

Opportunities in Residential Real Estate

October 28, 2009
Location: California office
Speakers: Mike Green, Ron Sonntag & Ritesh Patel

Come and join us as Virtu Investments, a company we have used to invest in real estate over the past 10 years, shares its insights on buying single family homes at unprecedented values. They will talk about their new fund and will focus specifically on the following topics:

- What is the general state of today's real estate market?
- How can investors take advantage of the numerous home foreclosures?
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- How to identify and invest in small local businesses that are cash flowing or growing
- How to increase profitability through active business management
- How to create effective exit strategies for private equity investments

Investing in Fixed Income Portfolios for the "New Normal" World

September 22, 2009
Location: California office
Speaker: Kevin M. Winters, CFP, CIMA

Kevin is a vice president and account manager for Pacific Investment Management Company (PIMCO). Kevin will share his perspective from the arena of fixed income on such major developments as a new administration in Washington, continuing instability in the markets, and a challenging real estate market. Join us as he highlights PIMCO's outlook for the economy and discusses:

- What impact tighter government policy might have on fixed income
- Results of massive monetary and fiscal stimulus and the U.S. dollar
- A comparison of the housing market and consumer markets, as each sector continues to de-leverage its balance sheet

Real Estate Investments: Challenges and Opportunities in Today's New Economic World

September 15, 2009
Location: Arizona office
Speaker: Michael R. Green

In tune with today's market developments, we have focused on investment opportunities generated by the recession. Most recently we have discussed distressed debt, and presented opportunities relating to it. Another opportunity we are currently exploring is in the area of multi-family and commercial properties. Many of you are familiar with Virtu Investments, a real estate investment group we've worked with for approximately 10 years. Virtu specializes in acquiring and managing real estate properties. Through the years we have developed the utmost confidence in Virtu's abilities. Please join us as Virtu's principal and co-founder discusses today's challenges and opportunities in the real estate market, including:

- An insider's view of the real estate market in general and the apartment market in particular
- Today's compelling buying opportunities
- The impact on real estate investing caused by changes in the lending market and recent government interventions

Are California Munis Safe?

August 26, 2009
Location: California office
Speaker: Len Templeton

Len is the president of Templeton Financial Services, an independent, fixed income-only money manager. His topic, Are California Munis Safe?, will explore:

- Budget issues and the impact on the municipal bond market
- Strategies for investing in California bonds

Are Arizona Munis Safe?

August 11, 2009
Location: Arizona office
Speaker: Len Templeton

Len is the president of Templeton Financial Services, the largest independent fixed income-only money manager in Arizona. His topic, "Are Arizona Munis Safe?", will explore:

- Budget issues and the impact on the municipal bond market
- Strategies for investing in Arizona bonds

Opportunities in a New Economy: Unique Perspectives from Three Advisors

August 5, 2009
Location: California
Panel: Chris Meacham, CPA, PFS, Keith Mc Kenzie, & Alan Nevin

The Chinese Miracle: A Basic Overview of the Opportunities and Risks of Investing in China

July 21, 2009
Location: California office
Speaker: Christopher Donnelly

Mr. Donnelly, Managing Director of Pacific Rock Capital, will present the opportunities and risks of investing in China, based on his experience dealing exclusively with Chinese companies. He will focus on macro investing drivers, different markets in which Chinese companies can list and how investors can participate, a summary of successful deals, and what investors should look for as well as avoid. Mr. Ted Haberfield, Executive Vice President of HC International, will also provide insight into current deals, opportunities and investor sentiment.

Managed Futures - Thriving in a Bear Market

July 15, 2009
Location: Arizona office
Speaker: Scott J. Nance

Scott is responsible for national business development of The Frontier Fund to registered investment advisors. Please join us as he explores why managed futures is a rapidly growing asset class and:

- Discusses how the performance of Managed Futures differs from traditional investments
- Provides an overview of the global markets in which Frontier trades
- Explains how adding Managed Futures to an investment portfolio may reduce risk and improve returns
- Addresses the risks of investing in Managed Futures

How to Speak to Clients about Growing and Protecting Their Largest Asset at Retirement - Their IRA

June 25, 2009
Location: California office
Speakers: Chris Meacham, CPA, PFS & Brenda Geiger

Whether you would like a refresher course or more in-depth information on this important topic, you will leave this midday seminar with valuable tools that can benefit your practice as we discuss:

- IRA Trusts and their benefits
- What you should know about an Inherited IRA
- The advantages of using a Self-Directed IRA
- Investments that belong in an IRA
- UBTI and its implications to an IRA

Cornerstone Manager Showcase

June 23, 2009
Location: Arizona office
Speaker: Terry O'Connor

Terry, the principal of Cedar Creek Management, LLC, will be our lead speaker, sharing what has driven his success as a hedge fund manager. We have been investing in Terry's fund for about 8 years and have the utmost confidence in his abilities to manage our clients' assets. In 25 years, Terry's fund has not experienced a down year, until last year, when the fund was down only half a percent.* In the past eight years, Terry outperformed the S&P 500 by 8% annually.* You do not want to miss his comments.

*Past returns are no indication of actual future performance

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June 18, 2009
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In tune with today's market developments, we have focused on investment opportunities generated by the recession. Most recently we have discussed distressed debt, and presented opportunities relating to it. Another opportunity we are currently exploring is in the area of multi-family and commercial properties. Many of you are familiar with Virtu investments, a real estate investment group we've worked with for approximately 10 years. Virtu specializes in acquiring and managing real estate properties. Through the years we have developed the utmost confidence in Virtu's abilities. Please join us as Virtu's principal and co-founder, Mike Green, discusses today's challenges and opportunities in the real estate market, including:

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- Provides an overview of global markets that are traded
- Explains how adding Managed Futures to an investment portfolio may reduce risk and improve returns
- Addresses the risks of investing in Managed Futures

Cornerstone Manager Showcase

April 28, 2009
Location: Arizona office
Speakers: Andrew Martin & Denny Barney

ARCUS Capital, LLC, is a private equity lending company with expertise in the real estate field. In February, Andrew and Denny presented information about ARCUS and the investment opportunities available in today's real estate market. Join us this month as they share specific investments and discuss their trust deed fund and distress debt funds.

Profiting on Home Foreclosures

April 21, 2009
Location: California office
Speakers: Cari Drolet & Stephen Bick

We all know that home foreclosures here in San Diego are in abundant supply, but how might that affect you either directly or indirectly? Please join Cari Drolet, founder of The Drolet Team, and Stephen Bick, founder of Cottingham Management Company, as they discuss:

- Assessing today's real estate market
- Identifying a market bottom in housing
- Navigating through short sales and foreclosures
- Profiting by the purchase of foreclosures

Real Estate - The Silver Lining

March 17, 2009
Location: California office
Speaker: Andrew Martin

Andrew is the principal of ARCUS Capital, LLC, a private equity lending company with expertise in real estate equity investments. Join us as he explores today's real estate market, including some of its most compelling investment opportunities. He will discuss:

- The success of ARCUS in producing positive returns in a negative market
- Taking advantage of distressed bank notes
- Where he believes the real estate market is heading

A Recession Proof Marketing Plan - How to Grow Your Business When Others Aren't

March 11, 2009
Location: Arizona office
Speaker: Eric Jackson

What does a comprehensive marketing plan look like in down times, and how can you position yourself ahead of the competition when times are good again?
Join Eric Jackson, Founder of Verispect-TrueVision Promotions, as he discusses the marketing elements and strategies that will differentiate your firm in the market place and prepare you for sustained success, including Referral and Social Marketing in today's online era.

Real Estate - The Silver Lining

February 10, 2009
Location: Arizona office
Speakers: Andrew Martin & Denny Barney

ARCUS Capital, LLC, is a private equity lending company with expertise in the real estate field. Two of its principals, Andrew Martin and Denny Barney, will discuss their success as real estate specialists. Cornerstone has known them for years and has the utmost confidence in their ability to manage its clients' assets. Please join us as we explore today's real estate market, including some of its most compelling investment opportunities.

Mastering Down Markets

February 4, 2009
Location: California office
Speaker: Terry O'Connor

Terry, the principal of Cedar Creek Management, LLC, will be our lead speaker, sharing what has driven his success as a hedge fund manager. We have been investing in Terry's fund for about 8 years and have the utmost confidence in his abilities to manage our clients' assets. In 25 years, Terry's fund has not experienced a down year, until last year, when the fund was down only half a percent.* In the past eight years, Terry outperformed the S&P 500 by 8% annually.* You do not want to miss his comments.

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Using Insurance to Protect Your Personal Assets

January 21, 2009
Location: California office
Speakers: John & Carolyn Konecki

We all know that insurance is a requirement when purchasing a home or registering a vehicle, but how do you determine the right kind of insurance, the right company and the right amount of coverage? Join us as John and Carolyn address issues such as:

- Are you getting the best value for your insurance buck?
- What about wildfire protection?
- Umbrella coverage - how much is enough?
- Are your collectables properly covered?
- Is your insurance agent a trusted advisor or an order taker?

Navigating the Storm #5

November 21, 2008
Location: California office
Speakers: Chris Meacham, CPA, PFS

We'd like to invite you and a guest to attend our upcoming roundtable, which will address the current financial turmoil. Join our President and CEO, Chris L. Meacham, CPA, as we discuss with him topics such as:

- How could the results of the election affect the investment world?
- What tax strategies actually benefit from the current situation?
- How could investors have protected themselves from the current upheaval?
- When is the time to focus on, and act on, opportunities?
- What are the best investment opportunities (real estate, municipal bonds, etc.)?

Navigating the Storm #4

November 7, 2008
Location: California office
Speaker: Chris Meacham, CPA, PFS

I'd like to invite you to attend our 4th "Navigating the Storm" roundtable, which will address the current financial turmoil. I welcome your attendance and invite you to bring a guest. We will be discussing topics such as:

- What's causing the current upheaval?
- What can investors do, if anything?
- How could investors have protected themselves from this?
- When is the time to focus on and act on opportunities?
- What types of investments are not adversely affected by the current meltdown?

Buechler Capital and Cornerstone Wealth Management Luncheon Seminar

November 5, 2008
Location: California office
Investment Strategies for Turbulent Times
Speaker: Chris Meacham, CPA, PFS

Given the turbulence in today's financial markets, what's an investor to do? Join me as we discuss the following questions:

- What investment strategies can provide financial peace of mind, even during times like these?
- Is it time to bail out or jump in?
- Are there investments that are actually making money and doing well?
- How do you avoid emotions taking over and driving bad investment decisions?

Investing for the Future
Speaker: William J. Buechler

Join Mr. Buechler as he discusses:

- The importance of diversification out of the US dollar
- Diversifying your portfolio by investing in Australia and New Zealand
- New Zealand - the next Norway and Brazil?

Investment Strategies for Uncertain Times and a Bold Prediction About What Estate Tax Will Look Like

October 29, 2008
Location: California office
Speaker: Chris Meacham, CPA, PFS, & Ronald A. Friedman, CPA

Today's volatile markets underscore the benefits of alternative investing. But what about the tax and estate ramifications? How do investors approach both investing and estate planning, given so many uncertainties about the future?

Navigating the Storm #3

October 28, 2008
Location: California office
Speaker: Chris Meacham, CPA, PFS

What's causing the current upheaval?
What can investors do, if anything?
How could investors have protected themselves from this?
When is the time to focus on and act on opportunities?
What types of investments are not adversely affected by the current meltdown?

Navigating the Storm #2

October 23, 2008
Location: California office
Speaker: Chris Meacham, CPA, PFS

What's causing the current upheaval?
What can investors do, if anything?
How could investors have protected themselves from this?
When is the time to focus on and act on opportunities?
What types of investments are not adversely affected by the current meltdown?

The Five Business Applications of Assessments

October 22, 2008
Location: California office
Speaker: Dan McNeill, CEO

Dan will offer you a unique opportunity to participate in a certified and confidential executive assessment. You will receive a complimentary copy of your assessment plus a custom coaching report that is designed around the results of your questionnaire. Dan will cover five business applications stemming from these assessments:

- Assessments for hiring, selecting and retaining talent
- Increasing effectiveness through self-awareness and knowledge of others.
- Developing more constructive and satisfying relationships with co-workers, colleagues, family members and others.
- Identifying gaps in the skill sets of leadership teams. Designing curriculum for closing those gaps.
- Team building and conflict resolution - learn why most team conflicts are value-based rather than behavior-based, and how to rise above these conflicts.

Navigating the Storm #1

October 17, 2008
Location: California office
Speaker: Chris Meacham, CPA, PFS

In light of market conditions, we are launching a weekly, one-hour luncheon roundtable to address the current turmoil. Please feel free to bring a guest. We welcome your questions and attendance. We will be discussing topics such as:

- What's causing the current upheaval?
- What can investors do, if anything?
- How could investors have protected themselves from this?
- When is the time to focus on and act on opportunities?
- What types of investments are not adversely affected by the current meltdown?

Work Smarter, Not Harder: A Primer for CPAs and Estate Planning Attorneys Who Want to Grow Their Practice by Improving Client Care

September 16, 2008
Location: California office
Speakers: Chris Meacham, CPA, & Nancy Foster Thornton

Join Chris Meacham, CPA, PFS, President and CEO of Cornerstone Wealth Management LLC and Nancy Foster Thornton, CPA, CLPF, President of Foster-Thornton LLC, as they discuss win/win ideas that will benefit both you and your clients:

- Improving practice profitability at no cost to clients
- Exploring creative ways to grow your business
- Helping clients avoid potential landmines when choosing a successor trustee
- Employing wealth transfer strategies to reduce clients' estate and income taxes
- Using a wealth forecasting model to help clients find peace of mind when making important decisions
- Streamlining clients' recordkeeping for the benefit of everyone

Turbulent Times and Retirement: Will Your Assets Last as Long as You Do?

June 25, 2008
Location: California office
Speaker: Chris Meacham, CPA, PFS

Given the turbulence in today's markets, are you still on track to meet your long-term retirement goals? Are your saving and spending levels sufficient to allow you to retire when you want? Join us as we discuss how the subprime meltdown might actually help you achieve your retirement goals, how to keep market declines from delaying your retirement, why old investment formulas for retirement no longer work, what investment strategies can provide consistent retirement income regardless of market conditions, and how to leave a lasting legacy.

Turbulent Times and Retirement: Will Your Assets Last as Long as You Do?

June 17, 2008
Location: Arizona office
Speaker: Chris Meacham, CPA, PFS

Given the turbulence in today's markets, are you still on track to meet your long-term retirement goals? Are your saving and spending levels sufficient to allow you to retire when you want? Join us as we discuss how the subprime meltdown might actually help you achieve your retirement goals, how to keep market declines from delaying your retirement, why old investment formulas for retirement no longer work, what investment strategies can provide consistent retirement income regardless of market conditions, and how to leave a lasting legacy.

Real Estate Investment Opportunity

May 22, 2008
Location: California office
Speaker: Jeff Hawkes

As several interested parties were unable to attend Tuesday's manager showcase on the real estate market, we are offering another meeting with Jeff Hawkes, President and CEO of Hawks Development. Jeff will discuss the real estate market and will focus specifically on a real estate development project in the Boise, Idaho, area for which we are currently doing due diligence.

Real Estate Investment Opportunity

May 20, 2008
Location: California office
Speaker: Jeff Hawkes

The real estate market has been of particular interest to everyone this past year. While tighter credit and diminishing values have caused concern, we've looked forward to the investment opportunities that such declines bring. Jeff Hawkes, President and CEO of Hawks Development, will discuss the real estate market. He will focus specifically on a real estate development project in the Boise, Idaho, area for which we are currently doing due diligence.

Real Estate Investment Opportunity

May 14, 2008
Location: California office
Speaker: Jeff Hawkes

The real estate market has been of particular interest to everyone this past year. While tighter credit and diminishing values have caused concern, we've looked forward to the investment opportunities that such declines will bring. Jeff Hawkes, President and CEO of Hawks Development, will discuss real estate investment and development. He will focus specifically on a real estate development project in the Boise, Idaho area we are currently raising money for.

Marketing on the Internet: A Guide for White-Collar, Baby Boomer Professionals

May 14, 2008
Location: California
Speaker: Leah Swearingen & Melani Gordon

Whether you are a CPA, attorney, wealth manager, banker, mortgage or insurance broker, your 2008 marketing program should entail some aspect of online marketing. But where to start? What's applicable to you? Leah Swearingen, APR, and Melani Gordon of gWAVE Consulting, will lead a discussion of the presence your business should have on the Internet, the basics of Search Engine Marketing (SEM), Pay-per-Click and other paid placements, the new rules of online marketing and how to measure the results.

Behavioral Finance 101

February 27, 2008
Location: Arizona office
Speaker: Chris Meacham, CPA, PFS

Is behavioral finance driving you to extremes? Are you a victim of behavioral finance? All too often decision making about personal wealth is influenced by unconscious biases that cause investors to make sub-optimal choices. The field of Behavioral Finance seeks to address and educate investors about issues such as the impact of bias on portfolio construction, the "price" investors pay for certainty, over-reacting to short-term volatility and reluctance to rebalance.

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The Secret of Creating Extraordinary Customer Service

January 29, 2008
Location: California office
Speaker: Richard Eppel

Did you know that satisfying customer requests may not result in customer satisfaction? Learn how to create extraordinary customer satisfaction by taking care of customer concerns. Richard Eppel, a business leader in the hi-tech industry, will show us how to read between the lines of a customer's request and discover his or her true concern, vs. the expressed request. Join us as we learn how to avoid dissatisfied customers and excel in providing customer service.