

2010 News and Press Releases

August

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 25th 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 4th 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.