

2011 Representative Evaluations

<u>Date</u>	<u>Organization</u>	<u>Topic</u>	<u>Knowledge</u>	<u>Presentation</u>
05/16/11	Massachusetts	Annual Review of Recent Tax Cases	4.71	4.79
05/17/11	Massachusetts	Investing Fundamentals for the Individual	4.89	4.94
06/03/11	CPE Link-Web	Tax Planning for Investments	5.00	4.60
06/06/11	Oregon	Dealing with Troubled Real Estate	4.54	4.62
06/07/11	Oregon	Investing Fundamentals for the Individual	4.64	4.79
06/08/11	Oregon	Annual Review of Recent Tax Cases	4.83	4.83
06/13/11	Western - VA	Financial Implosion & Reform	4.76	4.72
06/13/11	Western - VA	Health Care Reform	4.56	4.63
07/13/11	Western - CA	Financial Implosion & Reform	4.83	4.70
07/15/11	Western - CA	Health Care Reform	4.68	4.68
07/16/11	Western - CA	Negotiating & Structuring Business Deals	4.80	4.80
07/26/11	Western - WI	Financial Implosion & Reform	4.85	4.77
07/27/11	Western - WI	Health Care Reform	4.58	4.61
08/12/11	Georgia	2011 Annual Business Law Update	4.80	4.70
08/29/11	Kentucky	Family Wealth Management	4.79	4.64
08/30/11	Kentucky	Business Turnarounds & Restructurings	4.80	4.40
09/09/11	Louisiana	Family Wealth Management	4.83	4.85
09/20/11	Iowa	Using Economic News	4.78	4.70
09/20/11	Iowa	The New Mega-Trends	4.65	4.63
09/21/11	Iowa	Warren Buffett's Two Suggested Courses	4.73	4.77
09/21/11	Iowa	Obscure Code Sections CPAs Should Know	4.56	4.56
09/22/11	Iowa	Transferring or Exiting the Business	4.79	4.74
09/23/11	Iowa	Increasing Both the Top & Bottom Lines	4.63	4.69

2010 Representative Evaluations

<u>Date</u>	<u>Organization</u>	<u>Topic</u>	<u>Knowledge</u>	<u>Presentation</u>
01/11/10	Arkansas	Buying or Selling a Private Company	5.00	4.62
01/12/10	Arkansas	Legal Issues Every Acct. Should Know	4.90	4.62
01/18/10	California	Int. Controls, Corp. Gov. & Risk Mgmt.	4.85	4.81
01/19/10	California	Tax Aspects of Buying or Selling a Biz	4.58	4.39
01/20/10	California	Transferring or Exiting the Business	4.85	4.85
05/11/10	So. Carolina	Increasing, Preserving & Trans. Wealth	4.57	4.43
05/13/10	Catawba Chap.	Advising the Troubled Business	4.68	4.58
05/14/10	Strand Chapter	Advising the Troubled Business	4.78	4.71
06/15/10	Kansas	Creative Tax Strategies for Individuals	4.50	4.50
06/16/10	Kansas	Advising the Troubled Business	4.54	4.00
06/17/10	Kansas	Hot Biz Valuation Issues & Recent Cases	4.69	4.62
06/18/10	Kansas	Increasing, Preserving & Trans. Wealth	4.75	4.60
06/22/10	Oregon	Int. Controls, Corp. Gov. & Risk Mgmt.	4.67	4.75
06/24/10	Oregon	Investing Fundamentals for the Individual	5.00	4.82
06/28/10	Kansas	Investing Fundamentals for the Individual	4.71	4.64
06/29/10	Kansas	Transferring or Exiting the Business	4.79	4.79
06/30/10	Kansas	Business & Financial Statement Analysis	4.77	4.62
06/30/10	Kansas	Mistakes Made by Accts. & Auditors	4.71	4.57

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07/13/10	Colorado	Dealing with Troubled Real Estate	4.63	4.38
07/14/10	Western-Port.	Creating & Enhancing the Value of a Biz	4.91	4.73
07/16/10	Western-Port.	Negotiating & Structuring Business Deals	4.87	4.81
08/03/10	So. Carolina	Warren Buffett's Two Suggested Courses	4.71	4.57
08/03/10	So. Carolina	3 Key Elements of a Successful Business	4.33	4.42
08/11/10	Georgia	2010 Annual Business Law Update	4.75	4.55
08/25/10	GA - Webcast	Tax Issues of Real Estate Ownership	4.71	4.29
09/27/10	Virginia	2010 Annual Business Law Update	4.50	4.71
09/28/10	Virginia	Investing Fundamentals for the Individual	4.93	4.87
09/29/10	Indiana	Laying a Solid Foundation	4.75	4.50
09/29/10	Indiana	Start-Ups & Early Stage Companies	4.75	4.63
09/30/10	Indiana	Advising the Troubled Business	4.71	4.64
10/04/10	CPE- Link-Web	Tax Issues of Real Estate Ownership	4.70	4.50
10/06/10	Georgia	2010 Annual Business Law Update	4.73	4.60
10/08/10	Georgia	2010 Annual Business Law Update	4.73	4.60
10/20/10	Western – L.V.	Creating & Enhancing the Value of a Biz	4.73	4.77
10/21/10	Western – L.V.	Negotiating & Structuring Business Deals	4.85	4.73
10/25/10	Western – Mex.	Creating & Enhancing the Value of a Biz	5.00	5.00
10/26/10	Western – Mex.	Negotiating & Structuring Business Deals	5.00	5.00
10/27/10	Western-Scott.	Creating & Enhancing the Value of a Biz	4.90	4.80
10/29/10	Western- Scott.	Negotiating & Structuring Business Deals	4.82	4.67
11/11/10	CBIZ – Boston	Commercial Real Estate Taxation	4.60	4.67
11/11/10	CBIZ – Boston	Investing Fundamentals for the Individual	4.77	4.85
11/11/10	CBIZ – Boston	Legal Issues Every Acct. Should Know	4.77	5.00
11/15/10	Indiana	2010 Annual Business Law Update	4.57	4.48
11/16/10	Indiana	Real Estate Taxation	4.29	4.43
11/18/10	CBIZ – L.A.	Commercial Real Estate Taxation	4.33	4.58
11/18/10	CBIZ – L.A.	Investing Fundamentals for the Individual	4.25	4.50
11/18/10	CBIZ – L.A.	Legal Issues Every Acct. Should Know	4.71	4.86
12/01/10	Virginia	Legal Issues Every Acct. Should Know	4.78	4.67
12/02/10	Virginia	Stock Analysis and Portfolio Management	4.57	4.71
12/03/10	Virginia	2010 Hot Biz Valuation Issues & Cases	4.20	4.20
12/06/10	Washington	Buying & Selling a Business – Tax & Non	4.86	4.76
12/08/10	Washington	Real Estate Taxation	4.46	4.38
12/13/10	So. Carolina	Int. Controls, Corp. Gov. & Risk Mgmt.	4.37	4.35
12/14/10	So. Carolina	Analyzing a Biz and Its Financial Stat.	4.60	4.60
12/14/10	So. Carolina	Investing Fundamentals for the Individual	4.66	4.59
12/20/10	Georgia	2010 Annual Business Law Update	4.71	4.64
12/21/10	Georgia	2010 Annual Business Law Update	4.86	4.88
12/28/10	Georgia	Business & Financial Statement Analysis	4.73	4.53