



American Society of Women Accountants  
Sacramento Chapter #31

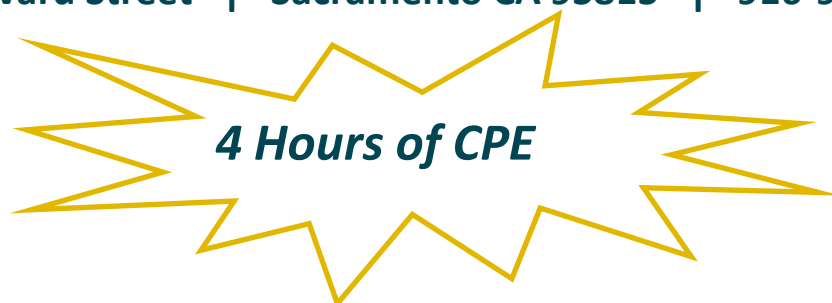
# Half-Day CPE Event

Tuesday, May 17, 2011, 8:00 a.m. to 12:20 p.m.

Registration 7:30 a.m. to 7:55 a.m.

Hilton Sacramento, Arden West

2200 Harvard Street | Sacramento CA 95815 | 916-922-4700



**Register by April 30 for Early Registration Discount:**

**\$100 for ASWA Members      \$135 for Nonmembers**

**After April 30:**

**\$120 for ASWA Members      \$155 for Nonmembers**

*Registration Price Includes Continental Breakfast*

**See Attached Registration Form**

**Sponsored by:**



[www.aswa-sacramento.org](http://www.aswa-sacramento.org)

See us on Facebook | ASWA, Sacramento

*"Empowering Women in the Financial and Accounting Profession since 1938"*



American Society of Women Accountants

## Sacramento Chapter #31

# Half-Day CPE Event Registration Form

4 Hours of CPE

Hilton Sacramento, Arden West

Tuesday, May 17, 2011, 8:00 a.m. to 12:20 p.m. | Registration 7:30 a.m. to 7:55 a.m.

The Sacramento Chapter of the American Society of Women Accountants (ASWA) cordially invites you to attend our Half-Day CPE Event. Please see the following event program for speakers and courses.

### Registration Fees

**Regular/Student Member** -- Registration fee postmarked by April 30 is \$100 for an ASWA member who is in good standing. Registration fee received after April 30 is \$120 for an ASWA member who is in good standing.

**Non-Member** -- Registration fee postmarked by April 30 is \$135 for a nonmember of ASWA. Registration fee received after April 30 is \$155 for a nonmember.

*Registration fee includes four (4) hours of CPE and continental breakfast.*

### Registration Discounts

**Firm Sponsor Discounts\*** -- For \$500, a Gold Sponsor receives 1) \$35 off for each non-member firm registrant, 2) an individual table to promote firm/agency, 3) recognition in our CPE event program, and 4) \$250 donation to the Chapter's Scholarship Fund. For \$300, a Silver Sponsor receives 1) \$25 off for each non-member firm registrant, 2) recognition in our CPE event program, and 3) \$200 donation to the Chapter's Scholarship Fund. For \$150, a Bronze Sponsor receives 1) \$10 off for each non-member firm registrant, 2) recognition in our CPE event program, and 3) \$50 donation to the Chapter's Scholarship Fund.

*\*Sponsors must email firm logo in digital form to the event committee chair for recognition in our CPE event program.*

### Administrative Policies: Cancellations, Substitutions, and No Shows

Cancellations and substitutions must be in writing and emailed to [bkaku@comcast.net](mailto:bkaku@comcast.net) to ASWA, Brenda Kaku, Event Committee Chair, 48 hours before the event date. You will receive confirmation of your request by email or phone within 24 hours. It is your responsibility to confirm that ASWA received your request. For more information regarding administrative policies, such as complaint and refund, please contact Brenda Kaku, Event Committee Chair, ASWA Sacramento Chapter, 2535 4th Ave., Sacramento CA 95818, [bkaku@comcast.net](mailto:bkaku@comcast.net) or 916-716-3991.

#### The following fees apply:

##### Cancellations

Cancellations must be emailed to [bkaku@comcast.net](mailto:bkaku@comcast.net) by 6:00 p.m. on Wednesday, May 11, 2011, to receive a full refund. Cancellations received after this date and time will be charged in full.

##### Substitutions

A registrant may substitute another individual in his/her place.

##### No-Shows

A registrant who does not cancel by 6:00 p.m. on Wednesday, May 11, 2011, and does not attend the event will be considered a no show and will forfeit the entire registration fee and course materials.

### Scholarship Fund Donations

Firms and members may make a tax-deductible donation to the Sacramento Chapter's Scholarship Fund.



## Half-Day CPE Event Program 4 Hours of CPE

Hilton Sacramento, Arden West

Tuesday, May 17, 2011, 8:00 a.m. to 12:20 p.m. | Registration 7:30 a.m. to 7:55 a.m.

Course Time   Course Code	Course Topics*	Speaker   Firm
8 - 8:50 AM   MAP/PFP-8S	Actions You Can Take After the Great Recession	Violetta Sit Terpeluk   Ameriprise Financial Services, Inc.
8 - 8:50 AM   L/PD-8B	Dynamic Appeal: Dramatic Leadership Techniques to Reach Out, Motivate, and Inspire!	Laurie Cozart   Dynamic Appeal Communications
9:20 AM - 10:10 AM   ACCTG-9S	Enterprise Risk Management (ERM)	Jennifer Aras & Lisa McCargar   Perry-Smith LLP
9:20 AM - 10:10 AM   GOVT-9B	City of Bell: A Case Study	Greg Lucido   Macias Gini & O'Connell LLP
10:40 AM - 12:20 PM   ETHICS-10S	Ethical Traps and Pitfalls	Ruth Rowlette   The Law Office of Ruth Rowlette, Inc.
10:40 AM - 12:20 PM   TAX-10B	Cancellation of Debt: The Nuts and Bolts of How to Handle a Mess ... At Least on a Tax Return!	Craig Fechter   Fechter & Company CPAs

Registrants may choose one (1) course per each time slot totaling four (4) hours of CPE. Registrants will have a 30-minute break between each course. Registration fee includes continental breakfast.

**Learning Objectives & Program Content:** Discuss and emphasize individual Course Topics\* as stated above. You will leave with an overall understanding and recognition of the importance of these topics from various professional perspectives.

**Program Level:** Overview

**Program Prerequisites/Advanced Preparation:** Interest in course topics

**Instructional Deliver Method:** Group Live

In accordance with the standards of the National Registry of CPE Sponsors, CPE credits have been based on a 50-minute hour. ASWA's National Registry Sponsor Number is 105423.

ASWA is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Suite 700, Nashville, TN, 37219-2417. Website: [www.nasba.org](http://www.nasba.org).

For more information or questions, please contact Brenda Kaku, Event Committee Chair, at (916) 716-3991 or [bkaku@comcast.net](mailto:bkaku@comcast.net).



American Society of Women Accountants  
Sacramento Chapter #31

Half-Day CPE Event Registration | May 17, 2011, 8:00 am to 12:20 pm | Registration 7:00 am to 7:55 am

Hilton Sacramento, Arden West | 4 Hours of CPE

**Firm & Contact Information**

Firm/Contact Name	
Address	
City/State/Zip	
Phone	

<b>Early Registration Discount: Register by April 30, 2011</b>		<b>Firm Sponsor Circle one:</b>	
Member Circle one:	Postmark by 4/30	Gold Sponsor	\$500
	After 4/30	Silver Sponsor	\$300
Nonmember Circle one:	Postmark by 4/30	Bronze Sponsor	\$150
	After 4/30	Classroom or Breakfast Sponsor	\$250

<b>Registrant #1</b>		<b>Course Event</b>			
Name		8:00 AM - 8:50 AM	Circle one:	MAP/PFP-8S	L/PD-8B
Email Address		9:20 AM - 10:10 AM	Circle one:	ACCTG-9S	GOVT-9B
Phone		10:40 AM-12:20 PM	Circle one:	ETHICS-10S	TAX-10B
Member Y or N	Member #:				

<b>Registrant #2</b>		<b>Course Event</b>			
Name		8:00 AM - 8:50 AM	Circle one:	MAP/PFP-8S	L/PD-8B
Email Address		9:20 AM - 10:10 AM	Circle one:	ACCTG-9S	GOVT-9B
Phone		10:40 AM-12:20 PM	Circle one:	ETHICS-10S	TAX-10B
Member Y or N	Member #:				

<b>Registrant #3</b>		<b>Course Event</b>			
Name		8:00 AM - 8:50 AM	Circle one:	MAP/PFP-8S	L/PD-8B
Email Address		9:20 AM - 10:10 AM	Circle one:	ACCTG-9S	GOVT-9B
Phone		10:40 AM-12:20 PM	Circle one:	ETHICS-10S	TAX-10B
Member Y or N	Member #:				

<b>Registrant #4</b>		<b>Course Event</b>			
Name		8:00 AM - 8:50 AM	Circle one:	MAP/PFP-8S	L/PD-8B
Email Address		9:20 AM - 10:10 AM	Circle one:	ACCTG-9S	GOVT-9B
Phone		10:40 AM-12:20 PM	Circle one:	ETHICS-10S	TAX-10B
Member Y or N	Member #:				

<b>Registrant #5</b>		<b>Course Event</b>			
Name		8:00 AM - 8:50 AM	Circle one:	MAP/PFP-8S	L/PD-8B
Email Address		9:20 AM - 10:10 AM	Circle one:	ACCTG-9S	GOVT-9B
Phone		10:40 AM-12:20 PM	Circle one:	ETHICS-10S	TAX-10B
Member Y or N	Member #:				

(Attach additional sheet if necessary)

**Scholarship Fund Donation**

\$\_\_\_\_\_ Tax deductible donation designated to the Sacramento Chapter's Scholarship Fund only.

**Payment Information**

Member: By 4/30 \$100; After 4/30 \$120	X_____ = \$_____	Firm Sponsor Discount: _____	\$_____ X_____ = \$_____
Nonmember: By 4/30 \$135; After 4/30 \$155	X_____ = \$_____	Firm Sponsor Attendee Discount: _____	\$_____ X_____ = \$_____
Scholarship Fund Donation:	\$_____	Total Payment Enclosed:	\$_____

Please mail completed form and check payable to ASWA by Wednesday, May 11, 2011 to:

ASWA, Sacramento Chapter  
c/o Brenda Kaku  
2535 4th Ave, Sacramento CA 95818

For more information, please contact Brenda Kaku, Event Committee Chair, at 916-716-3991 or bkaku@comcast.net.



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**Half-Day CPE Event**

**4 Hours of CPE**

**Hilton Sacramento, Arden West**

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## **SPEAKER BIOS**

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### **JENNIFER ARAS, CPA -- PERRY-SMITH LLP**

#### **Vice President, Assurance Services**

Jen has over eight years of experience performing and supervising financial statement audits. Clients include financial institutions, not-for-profit entities, employee benefit plans and other companies, including SEC registrants. As a member of the Perry – Smith LLP Executive Leadership Group, Jen coordinates the formal continuing education training program for the Firm’s staff and senior associates. Jen is also significantly involved in the quality control function of the Firm.

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### **LAURIE COZART, CEO -- DYNAMIC APPEAL COMMUNICATIONS**

#### **Leadership Communication Specialist**

Laurie’s background of corporate leadership and television acting brings a unique talent mix to leadership, sales, marketing, public speaking development and relationship communications training. Laurie has applied the lessons and expertise she has learned from over 30 years of experience in business and the media to her work. She helps high level CEOs to young professionals seeking promotion learn confidence and flexibility, build relationships to enhance collaboration and business development, use dramatic expression to inspire others to action, and integrate authenticity into communication to become a more effective leader. Laurie’s media experience also brings a unique awareness to the business arena to help corporate professionals improve image, body language, speaking skills and overall presentation delivery by using on camera training, voice and body movement techniques. Laurie Cozart is a certified business coach with BA in Business Administration. Laurie has been featured in Smart Money magazine, Training Magazine at ManageSmarter.com, a guest host on ShopNBC and has been in countless industrial films, training videos and TV commercials.



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## **SPEAKER BIOS**

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### **CRAIG FECHTER, CPA -- FECHTER & COMPANY CPAs**

#### **President**

Craig is the President of Fechter & Company, CPAs located in Sacramento and has developed a number of firm specialties, such as audit/review/compilation services, tax compliance and consulting, and general accounting and taxation consulting. Craig graduated from Sacramento State University in June, 2001 with a degree in accounting. He is presently enrolled at Golden Gate University with 9 of 10 classes completed towards a master's degree in the accounting program with an expected graduation date of December, 2011. Craig has been an adjunct faculty of accounting at American River College and is presently teaching a business tax course for UC Davis Extension. He recently assisted UC Davis staff in developing the course material, learning objectives, and course outline for this course. Craig has been active in the community as well, serving on the finance and executive committee of Big Brothers/Big Sisters of Greater Sacramento. Craig also serves on the Facilities, Transportation, and Finance Committee of the San Juan School District, which acts in an advisory capacity to the Board of Education.

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### **GREGORY M. LUCIDO, CPA – MACIAS GINI & O'CONNELL LLP**

#### **Senior Manager**

Greg is a graduate of CSU, Sacramento with a B.S. in Business Administration with a concentration in accountancy and is a Certified Public Accountant by the California Board of Accountancy. He has over nine years of experience in public accounting with Macias Gini & O'Connell LLP. Greg is a member of the American Institute of Certified Public Accountants (AICPA) and the California Society of Certified Public Accountants (CalCPA). Greg has made numerous presentations and lectures on various topics to MGO employees, clients, and professional organizations including the American Society of Women Accountants (ASWA) and the California Society of CPAs (CalCPA).



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## **SPEAKER BIOS**

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### **LISA McCARGAR, CPA -- PERRY-SMITH LLP**

#### **Senior Vice President, Assurance Services**

Lisa's background includes over twenty five years in both public accounting and private industry. She has extensive experience auditing healthcare and employee benefit plan clients and also serves manufacturing, real estate, insurance, not-for-profit and servicing companies. Lisa leads the Firm's training programs in the healthcare and employee benefit plan industries, and coordinates the Firm's participation in the AICPA Employee Benefit Plan Audit Quality Center. Lisa is a regular presenter at local Western Pension sessions and has participated as a speaker at past ASPPA/Western Pension and Benefits Annual Conferences. She has also presented to various audiences on topics such as 403(b) audit requirements and fair value accounting.

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### **RUTH ROWLETTE, JD -- THE LAW OFFICE OF RUTH ROWLETTE, INC.**

#### **ATTORNEY AT LAW**

Ruth is an attorney at Ruth A. Rowlette, Inc., a Professional Law Corporation in Sacramento, California and specializes in taxation, bankruptcy, and estate planning. Ruth has spoken at numerous engagements on ethics, tax aspects of bankruptcy, tax controversy, and estate planning and has publications on bankruptcy and taxes, ethics, innocent spouse, trust fund recovery penalty, and various tax and estate planning topics. She has a Juris Doctor from McGeorge School of Law and a B.A. from San Diego State University.



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## **SPEAKER BIOS**

### **VIOLETTA TERPELUK, CFP -- AMERIPRISE FINANCIAL SERVICES, INC.**

#### **Financial Advisor, Business Financial Advisor**

Violetta is a Certified Financial Planner and a franchise owner with Ameriprise Financial in Roseville. She has an M.B.A. in Corporate Strategy from University of Michigan Ross School of Business and a B.B.A. in Marketing from The Chinese University of Hong Kong. She was recently recognized as a 2011 FIVE STAR Wealth Manager by Sacramento Magazine. Her goal is to provide successful individuals with personalized financial advice. She coordinates her clients' finances with other professionals, including accountants and attorneys, so that together the team can help implement tax and estate planning strategies and make decisions to improve their overall financial situation. Her practice's unique Seasons of Advice Client Servicing approach delivers proactive, flexible and relevant financial direction. She strives to help her clients make the right decisions at the right time. She specializes in small business owner financial planning and retirement income strategies.