



*You are invited to....*

***CIWM Spring Quarter Board Meeting and Speaker Event***

**Tuesday, April 20, 2010**  
**The Paul Merage School of Business**

**Board Meeting (3:30 PM)**  
**Location: Executive Commons**

- Merage School 2010 update – Donna Mumford
- Co – Chair reports – Pat Soldano and Rick Keller
- Committee reports
  - Community Programs – Pam Adams
  - Professional Programs – Laine Ainsworth
  - Curriculum – Camille Jayne & David Young
  - Membership – Mark Moehlman & Kimberly Dwan Bernatz

**Speaker Presentation (5:00 PM)**

***Wealth Transfer Strategies***

**Moderator: Camille Jayne – Matters at Hand**  
**Tyler Terry, Financial Advisor, Northwestern Mutual**  
**Jim Leese, Partner, Ferruzzo & Ferruzzo**  
**Corinne Myre, CPA, Corinne Myre & Assoc.**

**Networking Reception (6:15 PM)**

To RSVP please contact Cristina Surpluss at [csurp@uci.edu](mailto:csurp@uci.edu) or 949.824.6042