



CAPSTONE MARKETING

Speaking Experience Prior to 2011

CPA Associates, "Marketing Strategies and Activities That Get Results," November 4, 2010

DFK/USA, "How to Refocus Your Practice Development Program to Generate New Business," October 19, 2010

Association for Accounting Marketing, "Expressing Your Firm's Personality through Marketing Communications," June 25, 2010

Association for Accounting Marketing, "Client Retention Strategies Every Firm Can Use," June 24, 2010

AGN International, "The Seven Keys to Successful CPA Firm Management," May 19, 2010

AGN International, "How to Measure the ROI of Your Marketing Program," May 17, 2010

Enterprise Network Worldwide, "The Seven Keys to Successful CPA Firm Management," June 10, 2009

Association for Accounting Marketing, "'Is Your Firm a Leader or a Laggard?," June 5, 2009, co-presenter

AICPA Practitioner's Symposium, "10 Marketing Tips for Small Firms on a Budget," May 6, 2009

AICPA Accounting Firm Marketing Forum, "Branding – Making the Most of What You've Got," January 15, 2009

AAM Seasoned Roundtable Call, "How to Influence and Motivate Others," November 11, 2008, panelist

AAM-New York Metropolitan Area Chapter, "Manage Your Marketing with a Budget," May 15, 2008

AAM-Greater Philadelphia Chapter, "Manage Your Marketing Career," May 1, 2008

CPASNet.com 14th Mid-Year Meeting, "Fine to Famous: CPA Firm Marketing Best Practices," "How Accounting Marketing Will Change in the Next Decade," and "Winning Proposals and Presentations," November 3, 2007

Progressive Business Audio Conferences, "Proven Strategies to Grow Your CPA Firms," October 30, 2007

Virginia Society of CPAs, Tidewater Chapter, "Marketing Activities That Get Results," October 24, 2007

Association for Accounting Marketing, "What Managing Partners Want from Their Marketers," June 6, 2007

Virginia Society of CPAs, Tidewater Chapter, "Build Your Business by Working Your Network," September 6, 2006

AICPA/Northstar Accounting Marketing Forum, "Marketing on a Shoestring – How to Get the Biggest Bang for Your Marketing Budget," January 13, 2006 and November 11, 2005

North Carolina Association of CPAs, "Manage Your Marketing for Increased ROI," November 15, 2005

Association for Accounting Marketing, Minnesota Chapter, "Building a Marketing and Sales Culture," November 8, 2005

IOMA, "Building Your CPA Firm: The Bottom Line on Branding" audio conference, speaker and moderator, September 21, 2005

AICPA Advanced Annual Tax Retreat, "Marketing Issues," July 25, 2005

Association for Accounting Marketing, "Marketing Planning: What Marketers Can Learn from the Three Little Pigs," June 9, 2005

Georgia Society of CPAs, Southeastern Accounting Show, "Who Moved My Marketing Plan?," August 2004

Association for Accounting Marketing, "Fine to Famous: CPA Firm Marketing Best Practices," June 10, 2004

AGN International, "Building Your Business Valuation Services Niche," May 24, 2004

Association for Accounting Marketing AAM High! Virtual Learning Series, "Aligning Your Marketing Stars – Getting the Most Out of All of Your Partners" with Harvard Professor Jay Lorsch, audio conference, moderator, May 18, 2004

Association for Accounting Marketing, Philadelphia Chapter, "The Power of Branding," January 6, 2004

Association for Accounting Marketing AAM High! Virtual Learning Series, "The Trusted Advisor" with David Maister, audio conference, moderator, November 6, 2003

Legal Marketing Association, Richmond-Hampton Roads Chapter, "Develop a Marketing Plan Using the Marketing Audit Approach," October 2, 2003

IOMA, "Best Practices in CPA Firm Marketing" audio conference, moderator, August 20, 2003

International Group of Accounting Firms, "The Power of Branding" and "Smart Marketing," June 27-28, 2003

PDI's Eighth Annual Marketing and Sales Directors Forum, "Let Your Little Light Shine: Leading Through Marketing," panelist, February 3, 2003

MSI, "The Power of a Professional Services Brand," October 21, 2002

INPACT Americas, "Creating Targeted, Timely Marketing Messages," June 11, 2002

Association for Accounting Marketing, "The Marketing Audit Process" and "Marketing Activities That Get Results," June 5-7, 2002

Alliott Group, "How to Achieve Double Digit Growth," May 17, 2002

CPAmerica, "Developing Your Niche" and "How to Network Effectively," May 14, 2002

RGL, "Exceeding Client Expectations," "Developing New Business," and "Professional Image," April 26-27, 2002

PDI's Seventh Annual Marketing and Sales Directors Forum, "How to Develop Strategic Marketing Plans That Will Help Your Practice Groups Grow," January 31-February 1, 2002

Association for Accounting Marketing, New York City Chapter Meeting, "Marketing in Hard Times," December 5, 2001

IA International, North American Conference, "Developing and Implementing Effective Marketing Plans," November 6, 2001

Polaris International, Leadership Development Program, November 5, 2001

Polaris International - Marketing Fly-In, "Developing/Implementing Effective Marketing Plans", October 5, 2001

Association for Accounting Marketing, June 20-21, 2001, "Developing/Implementing Effective Marketing Plans"

TAG International, June 19, 2001, "Double Digit Growth," "Niche Marketing," and "The Future of Accounting Marketing"

Moore Stephens North America, Inc., June 19, 2001, "Double Digit Growth"

American Women's Society of CPAs, June 14, 2001, "20 Terrific Ideas to Help You Become a Smarter Marketer"

American Institute of Certified Public Accountants, June 13, 2001, "20 Terrific Ideas to Help You Become a Smarter Marketer"

American Institute of Certified Public Accountants, June 12, 2001, "What's in a Brand?"

The Network of Leading Law Firms, June 2, 2001, "The Future of Law Firm Marketing"

AGN – North America, May 21, 2001, "Double Digit Growth and Its Relation to Marketing in 2001"

Clifton Gunderson, May 16, 2001, "Forget Business As Usual: How Accounting Marketing Will Change in the '00's"

American Bar Association, March 22, 2001, "Rainmaking and Marketing for Business Lawyers," Panelist

PDI's Sixth Annual Marketing and Sales Directors Forum, January 25-26, 2001, "Forget Business as Usual: How Accounting Marketing Will Change in the '00's"

Moore Stephens International Limited Biennial Conference, September 2000, "Unifying the Moore Stephens Approach to Marketing"

Accounting Firms Associated, inc., May 1999, "All New Proposals for Auditing Clients"

Association for Accounting Marketing, June 1998, "Proposals ... Presentations ... Pizzazz: Making the Most of Every Opportunity"

Accounting Firms Associated, inc., June 1998, "All New Proposals and Presentations: Opportunity's Knocking"

Moore Stephens International Limited, October 1996, "The Status of Moore Stephens North America, Inc."

Association for Accounting Marketing, June 1996, "Creating Winning Marketing Programs"

Associated Accounting Firms International, June 1996, "Furthering Your Niche Marketing Strategy"

Association of Accounting Administrators, Atlanta Chapter, November 1996, "How Administrators Can Help a Firm's Marketing Program"

Association of Accounting Administrators, Atlanta Chapter, January 1996, "Marketing 101"

Management Summit '93, January 1993, "Getting the Most from Your Marketing Program," panelist

Association of Accounting Marketing Executives, Inc., May 1992, "Advanced Marketing Techniques"

American Women's Society of CPAs, Atlanta Chapter, June 1991, "Marketing from the Trenches," co-presenter

Association of Accounting Marketing Executives, Inc., May 1990, "Advanced Marketing Techniques"