



# ASPE

AMERICAN SOCIETY OF  
PROFESSIONAL ESTIMATORS

**ORANGE COUNTY  
CHAPTER 3**

**DEC 2011**

Issue 46  
Volume 2011



[WWW.ASPENATIONAL.COM](http://WWW.ASPENATIONAL.COM)  
[WWW.ASPECHAPTER3.ORG](http://WWW.ASPECHAPTER3.ORG)

## OUR MISSION

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Since 1956, ASPE serves the construction & engineering industries by providing education, training, fellowship and opportunities for professional estimating development.

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# ORANGE SPEEL NEWSLETTER



DEC 2011

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## President's Message



Hello Everyone,

The holidays are here. We are proud to announce two new Chapter members, Rick Dill of Pipeline Suite, Costa Mesa, Ca. and Scott Porterfield, of The Moote Group, Santa Ana, Ca. Last months new member Luis Galaviz of American Wrecking, Inc. and Scott Porterfield attended our October meeting along with several new faces looking into joining ASPE and our Chapter. The educational meeting speakers and topics that Tom Smithson has in the pipeline are, in my opinion, educational, interesting and entertaining. So look for some great meetings and events ahead.

The Board of Directors, Officers and Chair Persons of our Chapter met to conduct Chapter business and continued to plan and calendar events and programs for the year. I attended the combined Fall Northwest and Southwest Regional meeting in Denver Colorado October 28-29 and filed the Federal 501C6 Application for Not for Profit status November 8, 2011. Unfortunately, Chapter will not be able to receive credit cards electronically and through the website until the Federal Not for Profit status is granted by the IRS. Using credit cards to pay for attending events will actually reduce the Treasurer's accounting effort by automating the transactions and recording them through the computer in addition to reducing Chapter expenses from those who make event reservations and do not show.

## President's Message

Every ASPE Chapter member is welcome to attend our Board Meetings and to contact any of us at any time if they have any suggestions or questions or visit our Board or communicate to the Board members through the Chapter Face book page. Please see me or contact me and I will be sure to send you an invitation with the Agenda and the previous months Meeting Minutes if you wish to attend a Board meeting.

I want to announce we are looking for ideas for social events, the Academy Day Seminar and job site walks from our chapter members. We will be reaching out to college students to get started in planning events to educate and stimulate interest in estimating. We are in the midst of planning an 11th Hour bid day simulation seminar. We are targeting college students and the industry at large. We need committee participation from our members and general contractor sponsors to help make these this event a success.

To keep abreast of our industry's technical advancements, promote professional ethical estimating practices in our industry and to sponsor events leading to that end requires total Chapter participation and support. Your participation by joining one of our committees will not only be rewarding but will certainly contribute to the success of the Chapter's efforts.



*Gregory R. Clayton*

## MEETING INFORMATION

# HOWARD ANDREW

Dinner meeting

### TOPIC

**“THE LEGAL OBLIGATIONS AND LIABILITIES FOR ESTIMATORS”**

PRESENTED BY *HOWARD ANDREW*

#### Date

Wednesday, Dec 14, 2011

#### Time

5:30 p.m. Social Hour & Networking

6:30 p.m. Program & Dinner

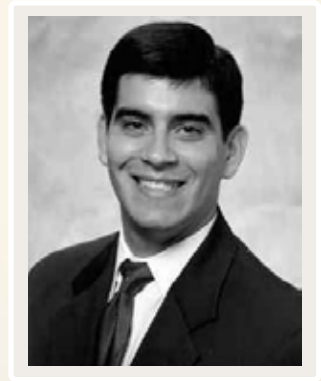
#### Location

Ayres Hotel 325 Bristol St. Costa Mesa, CA 92626

#### Cost \$40

(Includes Appetizer, Choice of entrée of Chicken Cordon Bleu OR Salmon fillet OR Beef Stroganoff, dessert, coffee/tea)

**RSVP at [www.aspechapter3.org](http://www.aspechapter3.org)**



**HOWARD ANDREW**  
PARTNER  
ALSTON & BIRD LLP

**A**ndy Howard is a partner in the Construction & Government Contracts Group at Alston & Bird LLP, where he has substantial experience advising clients on myriad federal procurement and construction law issues. In addition to advising clients on the unique procurement policies and procedures applicable to federal contracting, Mr. Howard represents contractors, construction managers and other construction industry professionals in a multitude of public and private construction matters, including the drafting and negotiating of design and construction contracts, and in mediating, arbitrating and litigating complex construction claims and disputes.

**M**r. Howard is the co-author of *The ABCs of Federal Government Contracting* published by Thompson Reuters, and is a contributing author of *The Construction Law Handbook* published by Aspen Publishers; *The Construction Contracts Book: How to find Common Ground in Negotiating Design and Construction Contract Clauses* published by the American Bar Association; and *The Complete Compliance and Ethics Manual, 2nd Ed., 2010*, published by The Society of Corporate Compliance and Ethics.

**M**r. Howard is a member of the American Bar Association's Public Contract Law Section and Construction Industry Forum, where he serves on the Steering Committee for Division II (Contract Documents), the Membership Committee, and routinely lectures on the topic of public construction contracting.

# MEETING INFORMATION

**NOV 2 (Wed.)**

**Board Meeting**

## Congratulations



**Best President Award**  
Congratulations to **Mike Mills**  
achieving "Best President Award"

## Calendar of Events

- **Dec 14, 2011**  
– Dinner meeting  
"THE LEGAL OBLIGATIONS AND  
LIABILITIES FOR ESTIMATORS"  
PRESENTED BY *HOWARD ANDREW*
- **More information**  
Visit chapter website for calendar

## Tentative

- **Aug 2012**  
– Annual Golf Day

## ASPE CHAPTER 3 BOARD OF DIRECTORS MEETING OVERVIEW November 2, 2011

The November Board of Directors Meeting began like normal Board meetings do with going through the agenda items of approving the July Meeting Minutes, 501C6 Corporation nonprofit status report, Programs report, the Treasurer report, President report and Committee Chairs reports followed by new business where we made plans for the 2011-2012 year.

The \$850.00 filing fee and the federal not for profit status application will be sent overnight to the IRS by November 7, 2011. The merchant credit card service for the Chapter through our bank F&M Bank must be postponed until the IRS approves our not for profit status. Greg will contact the Blue Book representative of our area this month to talk about offering them a free membership in exchange for their participation and advertising support with the Blue Book this month and report to the Board.

The Board discussed the idea of sharing a year end social event with another association outside ASPE. Steve will discuss that possibility with that association

## NOV 2 (Wed.)

## Board Meeting

and report back. Expect to be approached to support the newsletter articles by writing one or several articles in the coming months. We are planning a mass grading job site tour in Irvine and an 11th hour bid day simulation event as Academy event along with two other Chapters. The Board will be going out to the members for help in getting Chapter wide participation to bring these events together and expose the public to them this year.

The Chapter has two more new members this month Mr. Rick Dill and Mr. Scott Porterfield. Please give them a warm welcome.

Lastly, the primary goal of the Chapter is to increase the 2011-2012 scholarship funds, educate and serve its members.

**Gregory R. Clayton**

President/Secretary

# ARTICLES

## Technical Article

2011 - 2012

### Board of Directors

#### OFFICERS

**President**

Greg Clayton, PE, CPE, LEED® AP  
Contracting Engineers Inc, 949.548.2010  
[gclayton@4cei.com](mailto:gclayton@4cei.com)

**Past President**

Mike Mills, CPE  
Kaiser Permanente, 714.970.4544  
[Michael.G.Mills@kp.org](mailto:Michael.G.Mills@kp.org)

**Ist Vice President**

Tom Smithson  
951.371.5000  
[tedwardsmithson@gmail.com](mailto:tedwardsmithson@gmail.com)

**2nd Vice President**

Steve Murow  
The Moote Group, 714.751.5557x204  
[smurow@moote.com](mailto:smurow@moote.com)

**3rd Vice President**

TBD

**Secretary**

Greg Clayton, PE, CPE, LEED® AP

**Treasurer**

ChiaYen Yuan, LEED® GA  
Faithful + Gould, 562.314.4216  
[chiayen.yuan@fgould.com](mailto:chiayen.yuan@fgould.com)

**Directors**

Ron Svarc  
Wil Beukman  
Paulette Rutlen  
Dan Schottlander

### Five Game Changers in Accounting Software

*by Warren Hennagin, Glenn M. Gelman & Associates  
in collaboration with Gary Smyser of Alliant Solutions Group, LLC.*

The basics of accounting haven't changed all that much in the past 10 years but the technology in accounting software has changed dramatically. All programs can help you with the basic processes like paying bills, invoicing clients, producing payroll and generating financial reports. And we all know that software speeds up mundane tasks like mathematical calculations, posting transactions to multiple ledgers and generating reports and statements. Twenty years ago this was revolutionary.

However, today's end user has evolved along with the software. The market is demanding newer and more sophisticated tools that will enable them to broaden the scope and functionality of their software. Today, Software companies are changing the focus of their development efforts to incorporate advanced features in order to keep pace with the explosion in technology and the ever increasing demands of a more sophisticated customer. I have identified Five Game Changers in the accounting software marketplace. The ability to keep pace with these changes will determine the future of accounting software companies.

## Committee & Chairs

### Chapter Awards

*Greg Clayton, Mike Mills, Ron Svarc*

### Scholarship

### Marketing

*Steve Murow, Tom Smithson, Greg Clayton*

### Programs

*Tom Smithson, Greg Clayton, Steve Murow*

### Fundraising

*Steve Murow, Greg Clayton, Tom Smithson*

### Membership

*Ron Svarc, Mike Mills, Greg Clayton*

### Certification

*Ron Svarc*

### Education

*Wil Beukman*

### Standards

*Mike Mills*

### By-Laws

*Mike Mills*

### Corporation

1. **Business Intelligence (B.I.)** – simply put, this technology is used to mine data from your software and provide you with historical & current information, then, B.I. makes predictions based on that data. This enables you to analyze issues like company performance, sales revenue by product/area/office etc. Incorporating B.I. into your software enables you to understand your business better and see where you are headed. Gartner's ranks Microsoft Business Intelligence as the #1 B.I. product.
2. **Alerts & Warnings** – software apps that monitor your database for preset conditions and send you an on screen alert or an email to notify you that a condition has been met. Examples are; cash in bank +/- a set amount, job costs trending over budget, insurance expiration dates overdue, jobs with costs but no billings within a period, labor hours over budgeted amounts, etc.
3. **Mobile Computing** – In 2010 Morgan Stanley predicted that Mobile Computing would surpass the sales of computers within 5 years. This happened a few months ago for the 1st time in the history of computing. Smartphones, Tablets and Laptops allow end users unparalleled access to critical financial data, project costs and schedules, in real time, anywhere/anytime.
4. **The Cloud** – Microsoft, Apple, Intuit & Sage have all announced their intentions for Cloud Initiatives. Software operating systems are quickly becoming

## Technical Article

### Committee & Chairs

#### Website

*Paulette Rutlen*

#### Newsletter

*ChiaYen Yuan, Dan Schottlander*

#### Historical

#### Finance

*ChiaYen Yuan, Steve Murow, Wil Beukman*

#### Budget

*Steve Murow, Wil Beukman, Mike Mills*

### Board Members

**Art Quinion**, CPE, LEED® AP  
Phoenix Planning, 949.581.9370  
[artq@phoenix-planning.com](mailto:artq@phoenix-planning.com)

**Paulette Rutlen**, CPE, CEP  
Construction Cost Controls, 949.768.6686  
[paulette.rutlen@constructioncostcontrols.com](mailto:paulette.rutlen@constructioncostcontrols.com)

**Dan Schottlander**, CPE  
AECOM  
[dan.schottlander@aecom.com](mailto:dan.schottlander@aecom.com)

**Ron Svarc**, LCPE  
Accurate Consultant Services, 949.683.4751  
[kickerron@gmail.com](mailto:kickerron@gmail.com)

obsolete as companies are moving resources to the Cloud. The Cloud simply means moving your programs and data to large server farms hosted by other companies. Having the data stored on the internet, by another company, frees you from having to worry about backups, viruses, hardware failures and managing upgrades. Best of all, it gives you access to your information from anywhere/anytime. And, in the case of some software companies, from virtually any device that can support a browser.

5. **Integrated Software Suites** – There are two approaches to this model; “all in one products” and “Best of Breed”. Construction companies have always wanted products that allow them to see both the Operations side of their business and the Back Office (accounting). Both sides are critical to understanding your business. Having access to all of the information is key to generating profit, controlling overhead, managing cash, allocating resources and managing job site risk. Contractors need to manage these 4 main areas of their business; Accounting, Estimating, Project Management and Scheduling. There must be an efficient method of accessing information from all of these areas, pulling it together and analyzing it.

## Re-caps, Re-caps, Re-caps

by *Gregory R. Clayton*

Nov. Dinner Meeting

The November Educational Dinner Meeting featured Mr. Daniel C. Whittet, LEED AP; BD&C: Associate AIA Consultant to Industry for Sustainability and High Performance Buildings as our guest speaker. Tom Smithson, Chapter 1st Vice President and Programs Chairman introduced Mr. Whittet and briefed the group of his background in construction which, spans across the United States for over thirty years. He also briefly shared Mr. Whittet's professional associations and a few of his high profile LEED Gold construction projects and accomplishments.

Mr. Whittet began by stressing how important the LEED status is to developers not only for reducing the operation costs through highly efficient building performance but to market their property as a state of the art facility to prospective occupants and buyers. Integrating California's Cal Green codes with LEED into preconstruction decisions is critical. He waxed the Cal Green code is the minimum and LEED takes project to higher levels through examples of several high profile LEED projects in Las Vegas, and the Princeton Plasma Physics Lab. The level the developer chooses to take his project will dictate what the estimator will need to consider in calculating both direct and indirect costs for certification. He discussed how that decision is effected by market conditions and how estimators have to understand these criteria to accurately prepare their estimates. Currently, specifications are adapting to these rapidly changing sustainable government and private building performance criteria and the estimator needs to be informed and alert as to weak specifications in this area.

In closing he delineated what the future holds for LEED, BIM and estimators and the direction of new sustainable initiatives are headed.

*by Gregory R. Clayton*

Regional Meeting

**REGIONAL FALL QUARTERLY MEETING  
HIGHLIGHTS  
OCTOBER 28-29, 2011**

**T**he Denver Chapter sponsored events and the meeting that was held at the Oxford Hotel down town Denver. The Friday afternoon ACADEMY TOPICS were How to Integrate 3D Models to Aid a Reliable Estimate and Trends in Estimating. The presenters were Paul Martin, ASPE National Education Committee and Dr. Hung Nguyen of HerreroBoldt, San Francisco, Ca.

**I** decided to drive and stay in inexpensive hotels in the vspirit of economy. The drive was great seeing all the seasons colors and snow covered skiing resorts on the way. I even was able to take the opportunity to visit my cousin for an hour or so in Denver after the Saturday meeting session. There was patches of snow everywhere in Denver.

**S**aturday started out cold and clear and by the end of the day it got windy and colder. The Oxford Hotel is an old town refurbished building having a historic style all of its own. We stayed 20 minutes north west of down town in Westminster.

**T**opics dominating the morning session of the meeting were how to sustain long term Chapter growth, increase membership and member retention by promoting education and ethics through all Chapter events and programs. One prevailing mantra was to promote ASPE ethics creed as part of company marketing materials of the company proposals. Chapters were encouraged to include educational opportunities and meeting topics at each monthly meeting as well as the Chapter Academy event. Another idea that was strongly emphasized was that "Long term thinking and planning" must be a common character quality.

by *Gregory R. Clayton*

Regional Meeting

## Thoughts or Suggestions?

We are looking for your ideas and input regarding our newsletter and dinner programs. Do you have an idea for an upcoming dinner meeting? Would you like to be a presenter at one of our dinner meetings? Is there a topic of discussion that we should write an article about? Would you like to be a contributor to our newsletter?

Please contact *ChiaYen Yuan* at [ChiaYen.Yuan@fgould.com](mailto:ChiaYen.Yuan@fgould.com).

## Membership

Applications for membership can be downloaded from the national website- [www.aspenational.org](http://www.aspenational.org), or on our local website- [www.aspechapter3.org](http://www.aspechapter3.org). For more information, contact *Greg Clayton* at [gclayton@4cei.com](mailto:gclayton@4cei.com).

Steve Dunn, CPE, from our Chapter and the Southwest representative to the ASPE National Education Committee shared their committee plans and goals to film education seminars or “skype” them so they can be viewed as web casts to reach a larger audience and easier for members to participate.

David Battle, the Southwest Industry Awareness Committee representative have been working on integrating BIM and estimating and the descriptions and definitions for the “Omni Class tables”.

The National Certification Committee is still working to re write some of the Certification tests and up date the material.

The afternoon session included a presentations by Frank Young, FCPE and Dan Sackett, CPE from San Diego, Chapter 4 on the new awards guidelines for award submissions. The submissions are in Excel spread sheet format and the ability to set up hot links will expedite judging the submissions.

The meeting was well attended and informative. The Spring meeting will be March 2-3, 2012 in San Antonio, TX.

Contracting Engineers, Inc.

## MEMBER SPOTLIGHT

### *Kevin Murphy*

### Meet Your New Member



**K**evin Murphy has just relocated back to Orange County from Carlsbad, where he has lived the past 7 years. During that time he was Chief Estimator for Legacy Building Services, located in San Diego. Kevin began his career in construction 34 years ago as an apprentice carpenter progressing to Journeyman Carpenter while a member of Local 329 in Oklahoma City. At night, he attended classes at Oklahoma State University, where he earned his AS in Construction Engineering, an AS in Architecture, and a Certificate in Construction Estimating. While working for a small general contractor, Kevin was brought into the office as an Estimator / Project Manager in 1984. Kevin and his family moved to Rancho Santa Margarita, California, in 1986. Then while commuting to Gardena, where he was Chief Estimator for a general contractor, he continued his education by attending night classes at California State University Long Beach and earned his BS in Construction Management in 1994. Kevin earned his CPE in December, 2010.

**K**evin has worked for 4 – ENR Top 400 General Contractors in the positions of Estimator / Project Manager, Senior Project Manager and Chief Estimator. He also worked for Wal-Mart as a Construction Manager, overseeing the new construction and expansion of stores in Arkansas, Louisiana, Mississippi, Georgia and South Carolina. Kevin has been married to his wife Teri for 32 years. Their children are Melissa, son Brian, daughter-in-law Caila, grandchildren Hudson, Abbey and Stryder, who was born in October. His interests are his family, golf, carpentry, woodworking, reading and movies.

# INFORMATION

## Advertising Opportunities

**F**or more  
details

If you would like to advertise with us,  
contact *ChiaYen Yuan* at  
[chiayen.yuan@fgould.com](mailto:chiayen.yuan@fgould.com)

	Per Issue	5 issues	10 issues (Best Value!)
Business Card	\$25.00	\$100.00	\$150.00
¼ Page Ad	\$50.00	\$200.00	\$350.00
½ Page Ad	\$100.00	\$400.00	\$750.00
Full Page Ad	\$200.00	\$750.00	\$1250.00

## COMPANY MEMBER REPRESENTATIVES

*AECOM Analytical Planning Services, Inc. Bel Esprit Builders, Inc. Bert L. Howe and Associates  
Brussel Consulting & Const Mgmt Casper Estimating Services Consolidated Contracting Services  
Contracting Engineers Inc. Contractors & Cost Consultants Corecon Technologies Inc. Construction Cost Controls  
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Heinaman Contract Glazing Jacobs Engineering Kanda Project Services Corp Kerry Contractors, Inc.  
KFHP Inc. KGA, Inc. KHS&SL&R Construction Inc. Lawrence P. Lee & Associates Lombard Consulting Services, Inc.  
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McCarthy Building Co's O'Connor Construction Management, Inc. Pacific Rim Mechanical Contr. Inc.  
Performance Contracting, Inc. Pete Fowler Construction Services, Inc. Phoenix Planning Project Control Assoc. LLC  
Raymond Interior Systems Red Hill Services Construction Ronald Fedman Associates, Inc.  
Swinerton Builders TH Western Builder The Clark Construction Group The Moote Group The Rosenthal Company  
Timko Inc. Woods Construction*

## FOLLOW US

### Facebook Account

BECOME OUR FACEBOOK FRIEND

& LOOK US UP:

“ASPE CHAPTER 3, ORANGE COUNTY”

Our chapter Facebook account is up & running—ASPE Chapter 3, Orange County—we have added a few friends from last month and we need more! If you have an account, look us up, so you can follow our status for upcoming events!



ASPE

## CODE OF ETHICS

**Canon #1**

Professional Estimators shall perform services in areas of their discipline and competence.

**Canon #2**

Professional Estimators shall continue to expand their professional capabilities through continuing education programs to better enable them to better serve their clients, employers and the industry.

**Canon #3**

Professional Estimators shall conduct themselves in a manner, which will promote cooperation and good relations among members of our profession and those directly related to our profession.

**Canon #4**

Professional Estimators shall safeguard and keep in confidence all knowledge of the business affairs and technical procedures of an employer of client.

**Canon #5**

Professional Estimators shall conduct themselves with integrity at all times and not knowingly or willingly enter into agreements that violate the laws of the United States of America or of the states in which they practice.

**Canon #6**

Professional Estimators shall utilize their education, years of experience and acquired skills in the preparation of each estimate or assignment with full commitment to make each estimate or assignment as detailed and accurate as their talents and abilities allow.

**Canon #7**

Professional Estimators shall not engage in the practices of “bid peddling” as defined by this code. This is a breach of moral and ethical standards, and a member of this society shall not enter into this practice.

**Canon #8**

Professional Estimators and those in training to be estimators shall not enter into any agreement that may considered acts of collusion or conspiracy (bid rigging) with the implied or expressed purpose of defrauding clients. Acts of this type are in direct violation of the Code of Ethics of the American Society of Professional Estimator.

**Canon #9**

Professional Estimators and those in training to be estimators shall not participate in acts, such as the giving or receiving of gifts, that are intended to be or may be construed as being unlawful acts of bribery.

## FOLLOW US

by Paulette Rutlen

Twitter Account

### We Need Volunteers!!

We need your help! Anyone who is interested in serving on a committee for the OC chapter, please contact Greg Clayton at gclayton@4cei.com for more information. This is a great way to give back to ASPE both personally and professionally. We encourage you to attend a board meeting to see what it's all about. We meet every other month in a physical location and all ASPE members are welcome to attend.

### Welcome

We look forward to seeing you at this month's dinner meeting.



Serving construction estimating professionals by promoting ethical behavior, professional development, continuing education, standardization, certification and fellowship.



Twitter: [ASPE3OrangeCty](#)



**D**o you Tweet? With the advent of all of the social networking going on I figured we should be keeping up with the technology. For those of you not in the know, Twitter is a website that allows postings, called tweets, of no more than 144 keystrokes (yes, spaces count). With Twitter you can find individuals such as ASPE's national Executive Director (ASPENatExecDir), other chapters (ASPE12Reno or ASPE51SLCUtah), construction related organizations such as NAWIC, MC2, or McGraw Hill.

I intend on finding links to individuals and organizations that may be of interest to our membership. If you find an organization that you think would be of interest to our chapter membership let me know. Just post a tweet to ASPE3OrangeCty and I'll be sure to link us to the account.

**D**o you have insights to pass on to our membership regarding the construction industry in Orange County? With a Twitter account you can pass them along quickly. After all, how long can it take to type 144 characters? See a website or blog you think may be of interest, post the link with one tweet and the whole chapter can see it too.

**T**ry it out. Even if you never post anything, you can follow the postings of whoever you may find interesting. Hopefully, one of those will be ASPE3OrangeCty.

Thank you for reading ASPE OC Chapter3.

## ADVERTISING

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**Steven M. Murow**  
Vice President

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### CALLING FOR PRESENTERS!

Interested in giving a  
presentation at our chapter dinner  
meetings?

Interested in getting your  
company name out to members?

Come educate and Share  
with our members!

Contact **Tom Smithson** at  
[tedwardsmithson@gmail.com](mailto:tedwardsmithson@gmail.com)  
for more info!