

**-CABB Sub-Chapter Progress Report-
Date: 12-15-10
From: George Lanza - Sub Chapter Update**

Region	Silicon Valley (San Jose, Santa Cruz, Santa Clara)		
Chair:	Erik Otten		
Phone:	(408) 261-3230		
E-mail:	erik@vrsiliconvalley.com		
	Meeting Day:	2nd Friday of Every month	
	Meeting Time:	9:00 a.m.	To 10:00 a.m.
	Meeting Location:	Campbell Community Center, Campbell, CA	
	Cost:	\$7.00	

Next Meeting :TBD

- Contact Erik Otten at (408)261-3230 for more information.

Past Meetings

- **December 10, 2010**
- Speaker: Neil Kripalani, attorney
- Topic: How to avoid lawsuits
- Contact Erik Otten at (408)261-3230 for more information.

- **November 12, 2010**
- Speaker: Alan David, CPA
- Topic: Allocation of Purchase Price, Due Diligence and Cash vs. Accrual Method of Accounting
- Contact Erik Otten at (408)261-3230 for more information.

- **September 10, 2010**
- Speaker: Mike Clark, CPA
- Topic: Reading and Interpreting the Balance Sheet when Developing Adjusted Financials
- 17 attendees

- **July 9,2010**
- Speaker: Alice Sundberg & Michael Audiutori of Metlife
- Topic: How insurance can play a role in business sales.
- 4 attendees

- **June 11, 2010**
- Speaker: Tony Wilkins, Author, Columnist, Owner of Telemarketing Consulting Services
- Topic: Telemarketing
- 12 attendees

- **April 9, 2010**

- Topic: Marketing listings through video
- Speaker: Dan Powers, owner of Sound Vision
- Dan sponsored the event
- 11 attendees

- **March 19, 2010**
- Topic: What every broker should know about reading and understanding leases
- Speaker: Kathryn Gutierrez, attorney

Region	San Francisco		
Chair:	Norman Pearce		
Phone:	(415) 516-9009		
E-mail:	normanbti@earthlink.net		
	Meeting Day:	Every third Tuesday Quarterly Combined meetings with East Bay Chapter	
	Meeting Time:	11:30 a.m.	To 1:00 p.m.
	Meeting Location:	595 Market Street Suite 2410	
	Cost:	Bring own lunch	

Next Meeting: TBD (People are not interested)

Norman and Mike (East Bay Chair) are still trying to find a new location to hold their meetings.

Next Meeting

- **Date: TBD**
- Combined meeting with East Bay Chapter
- Contact Norman Pearce at (415)516-9009 for more information.

Past Meetings

- **April 20, 2010**
- Combined meeting with East Bay Chapter
- Speaker & Sponsor: Brad Lebseck from Focus Bank
- Topic: Updates on current SBA program
- 21 attendees

- **October 9, 2009**
- Topic: the value of positive ESCROW services and new banking rules
- 15 attendees

Region	East Bay
Chair:	Mike Nova
Phone:	(510)708-6682 - c

E-mail:	mnova@bluekeybma.com		
	Meeting Day:	Every third Tuesday Quarterly Combined meetings with San Francisco	
	Meeting Time:	11:30 a.m.	To 1:00 p.m.
	Meeting Location:		
	Cost:		
<p>Update: Mike and Norman (San Francisco Chair) are still trying to find a new location to hold their meetings.</p> <p>Next Meeting</p> <ul style="list-style-type: none"> • Date: TBD • Combined meeting with San Francisco Chapter • Contact Mike Nova at (510)708-6682 for more information. <p>Past meeting</p> <ul style="list-style-type: none"> • April 20, 2010 • Combined meeting with East Bay Chapter • Speaker: Brad Lebseck from Focus Bank • Topic: Updates on current SBA program • 21 attendees 			

Region	San Diego		
Chair:	Patrick Marsch		
Phone:	858-945-8921		
E-mail:	pmarsch@fcbb.com		
	Meeting Day:	Last Wednesday of every other month	
	Meeting Time:	11:30am	To 1pm
	Meeting Location:	Four Points Sheraton Hotel	
	Cost:	\$23.00 for Members, \$28.00 non members	
<p>Next meeting January 26</p> <ul style="list-style-type: none"> • Contact Patrick Marsch at (858)945-8921 for additional information <p>Past Meeting</p> <ul style="list-style-type: none"> • November 24, 2010 • Speaker: Paula Straub, Save Gains Tax • Topic: Deferred Sales Trusts • 30/35 attendees <p>Past Meetings</p> <ul style="list-style-type: none"> • August 25, 2010 • Speaker: Rick Itzkowich • Topic: Linked In – a Powerful Way to Get Referrals 			

- 25 attendees
- **May 26, 2010**
- Speaker: Ken Carver, D&G Escrow Corporation
- Topic: Pro Rata or “Short Sale” Escrows
- 35 attendees
- **March 31, 2010**
- Guest Speaker: Steve Coley, attorney
- Discussion: How to mitigate liability for a broker
- 26 attendees
- **Jan. 27, 2010**
- Guest Speaker: Jack R. Sanders, CBA
- Topic: Co-brokering: How to influence buyers and sellers with market data
- 22 attendees

Region	Sacramento		
Chair:	Andrew Rogerson		
Phone:	916-570-2674		
E-mail:	a.rogerson@murphybusiness.com		
	Meeting Day:	Last Tuesday of Every Other Month	
	Meeting Time:	12 pm	To 2 pm
	Meeting Location:	Commercial City Escrow	
	Cost:	\$ 0	

Next meeting

- **Date: TBD**
- Speaker: TBD
- Topic: TBD
- Contact Andrew Rogerson at (916)570-2674 for more information.

Past Meetings

- **Date: October 26,2010**
- Speaker(s): SBA lenders - Mike McGrane: Wells Fargo; Kelly Cheny: Plumas
- Topic: SBA changes
- 12 attendees: 5 were brokers
- **Date: August 24, 2010**
- Speaker: Brett Rossi, Bankruptcy Attorney, Law Offices of Brett Rossi
- **New Location:**
Commercial City Escrow
3838 Watt Ave. Suite F610
Sacramento, CA 95821
- 15 attendees: 4 were brokers

- **Date: June 29, 2010**
- Speaker: Fred Hall with the Institute of Business Appraisers
- Topic: Working Capital

- **April 27, 2010**
- Speaker: Donna Grady, Capitol City Escrow
- 19 attendees

- **Dec. 8, 2009**
- 9 attendees

Region	Inland Empire		
Chair:	Steve & Marilyn Peters		
Phone:	(951) 415-6288		
E-mail:	mpeters@ceobizbrokers.com		
	Meeting Day:	2nd Friday Quarterly	
	Meeting Time:	9am	To 10:30 am
	Meeting Location:	California Bank and Trust	
	Cost:	\$ No cost	

Update: Considering merging with Orange County due to lack of interest from local brokers.

Next Meeting:

- **Date: TBD**
- Speaker: TBD
- Topic: TBD
- Contact Marilyn Peters at (951)415-6288 for more information.

Past Meetings

- **Date: July 23, 2010**
- Speaker: Michael Hooper, internet strategist and web consultant for Infinity Art
- Topic: How to use Facebook in your Business
- 11 attendees

- **April 9, 2010**
- Speaker: Ken Carver, escrow officer
- Topic: Short Sales for Businesses
- 12 attendees

- **Nov. 13, 2009**
- Speaker: Chris Miller of Biz Broker Mail
- Topic: Marketing tactics for brokers during current economy

Region	Los Angeles		
Chair:	New Chair: Edward Fixen		
Phone:	(310) 418-1530		
E-mail:	miked@business-team.com		
	Meeting Day:	TBD	
	Meeting Time:	TBD	To TBD
	Meeting Location:	TBD	
	Cost:	\$TBD	
Update: New chairperson in place			
Next meeting date: TBD			

Region	San Fernando Valley		
Chair:	NEED NEW CHAIR – Suggestions?		
Phone:			
E-mail:			
	Meeting Day:	1st Friday of Every Other Month	
	Meeting Time:	9am	To 11am
	Meeting Location:	VEDC Business Center (Valley Economic Development Center)	
	Cost:	\$TBD	
Update: No new news			
Next meeting			
<ul style="list-style-type: none"> • Date: TBD • Speaker: TBD • Topic: TBD 			
Past Meetings			
<ul style="list-style-type: none"> • June 4, 2010 (cancelled) • April 9, 2010 • Topic: How to keep your prospects in the game • Speaker: Jonathan Goldhill from The Growth Coach • 10 attendees • February 5, 2010 • Speaker: Joe Lazaer from Asset Liquidation and Sales • Subject: How Liquidation Sales and Auctions Work • Wells Fargo SBA lender sponsored event • 13 attendees 			

Region	Central Coast		
Chair:	Rick Owens		
Phone:	(805) 543-0506		

E-mail:	biz.expert@yahoo.com		
	Meeting Day:	Quarterly	
	Meeting Time:	1 p.m.	To TBD
	Meeting Location:	755 Santa Rosa St. Suite 310 San Luis Obispo, CA 93401	
	Cost:	\$TBD	
Rick has not decided when he will have his next meeting.			
Next Meeting:			
<ul style="list-style-type: none"> • Date: TBD • Contact Rick Owens at (805)543-0506 for more information. 			
Past Meetings			
<ul style="list-style-type: none"> • April 23, 2010 • Speaker: John Linn, Double L Business Auction Services • Topic: Auctioning off businesses if they are at the point where they are closing down • Attendees: 3 			
<ul style="list-style-type: none"> • Feb. 19, 2010 • Speaker: Representative from Wells Fargo • Topic: SBA Loans 			

	Orange		
Chair:	Cathryn Valleveni		
Phone:	(714)633-0647		
E-mail:	vrbb@cox.net		
	Meeting Day:		
	Meeting Time:	9 am	To 11 am
	Meeting Location:	Plethora Businesses 2117 West Oranewood Avenue Orange, CA 92868	
	Cost:		
Cathryn has not started planning the next meeting yet.			
Next Meeting:			
<ul style="list-style-type: none"> • Date: TBD • Speaker: TBD • Topic: TBD • Contact: Cathryn Villeveni at (714)633-0647 for more information 			
Past meetings:			
<ul style="list-style-type: none"> • September 28, 2010 • Speaker: Michael Hooper, Infinity Arts • Topic: How to Use Facebook for Your Business • Sponsor: Jennifer Park, owner of Act One Escrow • 23 attendees 			

- **June 29, 2010**
- Topic: Roundtable discussion of marketing techniques to obtain listings
- 18 attendees

- **March 9, 2010**
- Speaker: Steven Benson from CABB
- Topics: Demonstrating the new CABB online listings system
- 26 attendees