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## FINANCE and BUSINESS EXECUTIVES ROUNDTABLE

**Facilitators: Meyers Brothers Kalicka, P.C**



*Join us for some lively discussions on a variety of  
finance and business topics!*

**The Finance and Business Executives Roundtable is held the second Friday of each month.** Below are the agendas through June 2010. Remember . . . the agenda is really set by the participants . . . Come prepared with topics you'd like to discuss!

**TIME and LOCATION:** 8:00 – 10:00 AM Continental Breakfast is included  
**EANE's Agawam Training Center -  
67 Hunt Street. Agawam, MA**

### Roundtable Agenda:

**March 12<sup>th</sup> - Bill Trudeau, Owner of [Insurance Center of New England](#)** will educate CFOs and Controllers about workers comp experience modification rates: and provide behind-the-scenes tips and secrets on how the scores are developed, how firms can control or reduce their experience rate, what firms can ask of their insurance agents to help control the rate.

### **Upcoming Agendas:**

**April 9<sup>th</sup> - [Maureen Tobin, Esquire](#), attorney for [Cooley Shrair, PC](#):** Maureen will present a compare/contrast overview of succession planning options depending on an organization's entity structure.

**May 14<sup>th</sup> – Joe Messer, CPA, Senior Manager in the [MBK Pension Audit Division](#).** Joe will present an overview of pitfalls to avoid in pension plan administration, from a Controller's perspective.

**June 11<sup>th</sup> - [Jeff Sattler](#), President of [Nuvo Bank](#) and [Rudy D'Agostino](#), Audit Partner of Meyers Brothers Kalicka, P.C.:** Jeff and Rudy will co-facilitate a Roundtable about financial statements, the three levels of statements and their purposes, from a lending and reporting perspective.