

2012 Chapter Meetings

Thank you for your interest in attending an H.D. Vest Chapter Meeting. Dates and times are subject to change, please contact the Chapter Director to confirm meeting details. Chapter Director contact information is sent to your H.D. Vest e-mail address monthly, along with details specific to each Chapter meeting.

Sorted by State then City

AZ

Phoenix

Preferred RSVP: razok@hdvest.net

Date	Time	Facility	Chapter Director
1/11/2012	09:00 AM	Hotel Highland at Biltmore 2310 East Highland Avenue	Ralph Martin III

CA

Anaheim

Preferred RSVP: 714-772-9200

Date	Time	Facility	Chapter Director
1/11/2012	08:00 AM	Marie Calendars 540 W Euclid	Richard Strayer

Chino

Preferred RSVP: 909-987-9490

Date	Time	Facility	Chapter Director
1/18/2012	10:00 AM	Marie Callenders 5455 Philadelphia	Randy Abril

Concord

Preferred RSVP: (925) 930-7737

Date	Time	Facility	Chapter Director
1/10/2012	09:00 AM	Crowne Plaza Hotel 45 John Glen Dr.	Ray Matthes

Downey

Preferred RSVP: Ray@Andazola.com

Date	Time	Facility	Chapter Director
1/12/2012	01:00 PM	Downey Event Center 10627 Old River School Rd	Ray Andazola

Fresno

Preferred RSVP: John@4uiplan.com

Date	Time	Facility	Chapter Director
1/11/2012	10:00 AM	At the office of John Banuelos 2350 W. Shaw	John Banuelos

Investment and Insurance Products: NOT FDIC Insured | NO Bank Guarantee | MAY Lose Value
For Internal Use Only

Securities offered through H.D. Vest Investment Services(sm) Member: SIPC
Advisory services offered through H.D. Vest Advisory Services(sm)
6333 N. State Highway 161 Fourth Floor Irving TX 75038 (972) 870-6000

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San Diego		Preferred RSVP: colleen@pfssd.com	
Date	Time	Facility	Chapter Director
1/19/2012	09:30 AM	Coco's Restaurant 5955 Balboa Ave	Mark Hyma

Santa Barbara		Preferred RSVP: (805) 460-0749	
Date	Time	Facility	Chapter Director
1/11/2012	10:00 AM	Eladio's Restaurant 1 State Street	Jerry Takier

Santa Rosa		Preferred RSVP: (707) 546-8884 or Alivingston@sonic.net	
Date	Time	Facility	Chapter Director
1/11/2012	09:00 AM	At the office of Stephen Imboden 1400 N. Dutton Ave, STE 22	Stephen Imboden

Tarzana		Preferred RSVP: galomedina@sbcglobal.net	
Date	Time	Facility	Chapter Director
1/13/2012	12:00 PM	Kraving Fusion 18663 Venture Blvd	Galo Medina

Temecula		Preferred RSVP: colleen@pfssd.com	
Date	Time	Facility	Chapter Director
1/26/2012	09:30 AM	Pat and Oscar's 29375 Rancho California Rd	Mark Hyma

Valencia		Preferred RSVP: robert@downingtax.com	
Date	Time	Facility	Chapter Director
1/13/2012	09:00 AM	At the office of Robert Downing 27955 Smyth Drive Suite #104	Robert Downing

CO

Denver		Preferred RSVP: wanda@towerstax.com	
Date	Time	Facility	Chapter Director
1/16/2012	12:00 PM	Dave and Busters 2000 S. Colorado Blvd Ste D	Deborah Towers

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FL

Clear Water

Preferred RSVP: johnbeebe@aol.com

Date	Time	Facility	Chapter Director
1/10/2012	12:00 PM	Bascom's Restaurant 3665 Ulmerton Rd	John Beebe

Orlando

Preferred RSVP: BrinkmanR@hdvest.net

Date	Time	Facility	Chapter Director
1/10/2012	09:00 AM	Mimi's Café (off of Conroy Rd Near I-4) 4175 Millenia Blvd	Richard Brinkman Jr.

Plantation

Preferred RSVP: mbushkin@bellsouth.net

Date	Time	Facility	Chapter Director
1/11/2012	11:00 AM	Renaissance Hotel 1230 So. Pine Island Road	Mark Bushkin

Tallahassee

Preferred RSVP: 850-878-3500

Date	Time	Facility	Chapter Director
1/12/2012	09:00 AM	At the office of Barbara Clements 3113 Capital Medical Blvd	Barbara Clements

West Palm Beach

Preferred RSVP: mbushkin@bellsouth.net

Date	Time	Facility	Chapter Director
1/10/2012	11:00 AM	West Palm Beach Marriott 1001 Okeechobee Blvd	Mark Bushkin

GA

Atlanta

Preferred RSVP: mstill@windercpa.com

Date	Time	Facility	Chapter Director
1/11/2012	09:00 AM	Invesco Two Peachtree Point 1555 Peachtree St. NE	Mark Still
1/11/2012	09:00 AM	Invesco Two Peachtree Point 1555 Peachtree St. NE	Richard Nixon

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HI

Waikiki

Preferred RSVP: thomas@maui.net

Date	Time	Facility	Chapter Director
1/13/2012	11:00 AM	Mac 24/7 Restaurant 2500 Kuhio Ave	Thomas Revelle

ID

Meridian

Preferred RSVP: Laurie@bowenandparker.com

Date	Time	Facility	Chapter Director
1/6/2012	10:00 AM	Louie's 2500 E. Fairview Ave	Gavin Parker

IL

Crestwood

Preferred RSVP: gellerandkraus@yahoo.com

Date	Time	Facility	Chapter Director
1/25/2012	09:30 AM	Hampton Inn 13330 S. Cicero	Arnold Kraus

IN

Indianapolis

Preferred RSVP: mark@matkovicfinancial.com

Date	Time	Facility	Chapter Director
1/11/2012	09:00 AM	Wingate Inn 6240 Intech Commons Drive	Mark Matkovic

KY

Ft. Wright

Preferred RSVP: Jessica@raileyfinancial.com -or- (859) 261-5757

Date	Time	Facility	Chapter Director
1/10/2012	09:00 AM	At the office of Randy Railey 1717 Dixie Hwy, Meeting room	Randy Railey

LA

La Place

Preferred RSVP: Nolan@Schexnayderfinancial.com

Date	Time	Facility	Chapter Director
1/11/2012	01:00 PM	Italian Pie - Grapevine Room 405 Belle Terre Blvd	Nolan Schexnayder

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MA

Halifax	Preferred RSVP: TrepanierG@hdvest.net		
Date	Time	Facility	Chapter Director
1/12/2012	01:00 PM	Halifax Country Club Country Club Drive	Gerard Trepanier

Westford	Preferred RSVP: westfordtax@aol.com or (978) 692-5666		
Date	Time	Facility	Chapter Director
1/10/2012	09:00 AM	At the office of Susan Cornwall 270 Littleton Road #14	Susan Cornwall

Worcester	Preferred RSVP: 508-797-0005		
Date	Time	Facility	Chapter Director
1/10/2012	12:00 PM	Coral Seafood Restaurant 225 Shrewsbury St.	Satya Mitra

MD

Baltimore	Preferred RSVP: Mark Robinson (302) 655-9505 ext 25		
Date	Time	Facility	Chapter Director
1/12/2012	09:00 AM	Hampton Inn White Marsh 8225 Town Center Drive	Rick Miller

ME

South Portland	Preferred RSVP: gbdmwalker@aol.com		
Date	Time	Facility	Chapter Director
1/10/2012	09:30 AM	Wyndham Hotel 363 Maine Mall Road	Patricia Flagg

MI

Troy	Preferred RSVP: 248-656-2200		
Date	Time	Facility	Chapter Director
1/12/2012	09:00 AM	Somerset Inn 2601 West Big Beaver Rd	Jeff Freeman

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MS

Biloxi

Preferred RSVP: 228-388-6906 OR rjillich@strojnycorp.net

Date	Time	Facility	Chapter Director
1/6/2012	09:00 AM	At the office of Kerry Milligan 2598 Pass Road STE F	Kerry Milligan

NC

Charlotte

Preferred RSVP: John@nicholshess.com

Date	Time	Facility	Chapter Director
1/9/2012	09:00 AM	Marriott -Springhills Suites Ballantyne 12325 Johnston Rd	John Hess

Wendell

Preferred RSVP: finchj@hdvest.net

Date	Time	Facility	Chapter Director
1/11/2012	11:00 AM	Wendell Country Club 180 Jake May Drive	Merri Lynne Morgan

NE

Omaha

Preferred RSVP: 402-334-6708

Date	Time	Facility	Chapter Director
1/11/2012	11:30 AM	Biaggis Resturant 13650 California Street	Pat O'Malley

NJ

Andover

Preferred RSVP: teresa@hundleycpas.com

Date	Time	Facility	Chapter Director
1/10/2012	04:00 PM	Adam Todd Caterers -Cranberry Lake 263 Route 206	Ethan Hundley

Hasbrouck Heights

Preferred RSVP: ryane@ryanfinancial.net

Date	Time	Facility	Chapter Director
1/12/2012	04:00 PM	Holiday Inn 283 Rt 17 South	Ed Ryan

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Spring Lake

Preferred RSVP: tracey@jackoujocpa.com

Date	Time	Facility	Chapter Director
1/11/2012	08:30 AM	The Breakers on the Ocean 1507 Ocean Avenue	Jack Oujo

NV

Las Vegas

Preferred RSVP: colleen@pfssd.com

Date	Time	Facility	Chapter Director
1/9/2012	10:00 AM	Maggiano's Little Italy 3200 Las Vegas Blvd South	Mark Hyma

NY

Batavia

Preferred RSVP: aterzolo@gmail.com

Date	Time	Facility	Chapter Director
1/19/2012	09:00 AM	Clarion (Former Holiday Inn) 8250 Park Road	Shelly Terzolo

Liverpool

Preferred RSVP: aterzolo@gmail.com

Date	Time	Facility	Chapter Director
1/17/2012	09:00 AM	Maplewood 400 7th N. Street	Shelly Terzolo

Middletown

Preferred RSVP: Della@ufpacpas.com

Date	Time	Facility	Chapter Director
1/18/2012	09:00 AM	Middletown Courtyard by Marriott 24 Crystal Run Crossing	Stephen Plain

Ronkonkoma

Preferred RSVP: (631) 581-4329

Date	Time	Facility	Chapter Director
1/10/2012	09:00 AM	Holiday Inn 3845 Veterans Memorial Hwy	Ann Kershaw

White Plains

Preferred RSVP: dcc1910@aol.com

Date	Time	Facility	Chapter Director
1/10/2012	11:00 AM	Buon Amici 238 Central Ave	Dianne Corsbie

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OH

Plain City

Preferred RSVP: bditty@dittyfinancial.com

Date	Time	Facility	Chapter Director
1/13/2012	09:00 AM	Der Dutchman Route 42	Bill Ditty

OK

Oklahoma City

Preferred RSVP: mmitchell@dannycochran.com

Date	Time	Facility	Chapter Director
1/11/2012	09:00 AM	OSU/OKC Campus - Conference Rm 304 900 N. Portland	Danny Cochran

OR

Gresham

Preferred RSVP: BardiA@hdvest.net OR (503) 666-7909

Date	Time	Facility	Chapter Director
1/11/2012	09:00 AM	At the office of Tony Bardi 151 SE 223rd Avenue	Tony Bardi

PA

Glen Mills

Preferred RSVP: (610) 558-1911 or kgandhi5@comcast.net

Date	Time	Facility	Chapter Director
1/12/2012	08:30 AM	BERTUCCI'S OF CONCORDVILLE 501 Byers Drive	Kumud Gandhi

Langhorne

Preferred RSVP: WagnerM@hdvest.net

Date	Time	Facility	Chapter Director
1/11/2012	08:30 AM	Chicago Grill 198 N. Buckstown Rd	Marc Wagner

Manheim

Preferred RSVP: DarlingD@hdvest.net

Date	Time	Facility	Chapter Director
1/12/2012	08:30 AM	Hampton Inn 2764 Lebanon Rd	Douglas Darling

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Monroeville

Preferred RSVP: cfsclientservice@yahoo.com

Date	Time	Facility	Chapter Director
1/11/2012	08:30 AM	Holiday Inn Monroeville 2750 Mossie Blvd	Paul Carpenter

Mt. Lebanon

Preferred RSVP: tomgeisler@comcast.net

Date	Time	Facility	Chapter Director
1/13/2012	08:30 AM	Café IO (Iovino's) 300A Beverly Rd	Tom Geisler

Tamaqua

Preferred RSVP: lfsinfo2@ptd.net or 570-668-0765

Date	Time	Facility	Chapter Director
1/10/2012	09:00 AM	Lehigh Carbon Community College - Tamaqua Cam 234 High Street	Juliann Longhi

TN

Knoxville

Preferred RSVP: paul@rtgcpa.com

Date	Time	Facility	Chapter Director
1/17/2012	09:30 AM	Shoney's of Knoxville 2405 Andersonville Hwy, Exit 122 on I-75	Paul Whitmire

Nashville

Preferred RSVP: tiffany@jimdurhamcpa.com

Date	Time	Facility	Chapter Director
1/18/2012	09:00 AM	Maggiano's Little Italy 3106 West End Ave.	Tom Janney

TX

Austin

Preferred RSVP: Katherine@cpaguy.com

Date	Time	Facility	Chapter Director
1/12/2012	08:30 AM	UT Club 2108 Robert Dedman Dr	Guy Huffman

Grand Prairie

Preferred RSVP: 972-264-4967

Date	Time	Facility	Chapter Director
1/10/2012	09:00 AM	At the office of Roger Kerbow 111 S.W. Dallas	Roger Kerbow

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Houston

Preferred RSVP: officegang01@aol.com

Date	Time	Facility	Chapter Director
1/11/2012	11:00 AM	Kenny & Ziggy's Deli (The Schmooze Room) 2327 Post Oak Boulevard	Lynn Fletcher

Mesquite

Preferred RSVP: VinsonS@hdvest.net

Date	Time	Facility	Chapter Director
1/11/2012	12:00 PM	Dallas Athletic Club 4111 La Prada Dr.	Steve Vinson

San Antonio

Preferred RSVP: FAX - (210) 566-4324

Date	Time	Facility	Chapter Director
1/10/2012	09:00 AM	Wells Fargo Nat'l Bank 40 NE Loop 410, 2nd floor	Pat Johnson

UT

Sandy

Preferred RSVP: DahleW@hdvest.net

Date	Time	Facility	Chapter Director
1/18/2012	08:30 AM	Sandy Residence Inn 270 W. 10000 South	Bill Dahle

VA

Blacksburg

Preferred RSVP: MitchellP1@hdvest.net

Date	Time	Facility	Chapter Director
1/10/2012	11:30 AM	Zeppolis Italian Resturant 810 University City Blvd	Paul Mitchell

McLean

Preferred RSVP: terry@terryljonescpa.com

Date	Time	Facility	Chapter Director
1/12/2012	10:00 AM	Maggiano's Tyson Coner 2001 International Drive	Terry Jones

WA

Bellevue

Preferred RSVP: miranda@steelecpa.com

Date	Time	Facility	Chapter Director
1/12/2012	10:00 AM	Coast Bellevue Hotel 625 116th Ave. NE	Richard Steele

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WI

New Richmond

Preferred RSVP: shaferm@hdvest.net

Date	Time	Facility	Chapter Director
1/11/2012	09:00 AM	Ready Randy's 1490 131st	Marsha Shafer