

**JANUARY TOPIC** ▶▶

# Financial Forecast 2009-2010: After the Economic Meltdown, How Do You Invest?

Organizer and Moderator: Jim Handlon, CEO, Bottomline Partners

## Overview

Today, in the midst of the worst financial meltdown in our lifetime, everyone wants to know, "What do you do next?"

Our three CXO panel members bring over 75 years diversified experience within different business arenas to address this critical question of "What do you do?" 2009 and 2010 will be challenging times and a new world of investment opportunities is unfolding.

This CXO forum will provide CEO's with a predictive, multi-viewpoint financial forecast of where growth and investment opportunities will be in the next two years as seen by leading investment management executives from our region.

At the conclusion of this CXO Forum, you will better understand:

- Where the future growth opportunities will be
- What paths should be taken
- What risks should be avoided
- How individuals and companies should get prepared
- Tips for getting desired investment results in the future

**BRING A GUEST!**

## Our Distinguished Panelists

**Jim Hoban** (BS, MBA, Series 7 & 63)  
**Managing Director, Riderwood**



Jim Hoban is an international investment management executive with over 25 years experience in institutional investments for states, school systems, retirement

funds, foundations, private equity, and corporate clients. Seeking long-term, predictable returns for clients through alternative approaches, like structured financings, is a major future emerging financing strategy and will be one of the focused discussions by Mr. Hoban. As an advocate of institutions, finding growth opportunities carrying the appropriate acceptable risks will be a lively theme.

**Brad Loper** (BS, MBA, MS Financial Planning), **Founder/Partner, DouglasBradley**



Brad Loper is a broadly experienced in management consulting, real estate, investments, and running small businesses.

DouglasBradley is a fully independent, fee-only financial advisory practice

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**CXO Forum** 2009 SERIES

**JOIN US!**

**THURSDAY  
JANUARY 8  
2009**

**7:30am to 7:45am**  
Networking and  
Continental Breakfast

**7:45am to 8:00am**  
The CEO Roundtable

*Discuss your specific  
issues and challenges  
with colleagues and  
fellow CXO members*

**8:00am to 9:15am**  
CXO Forum  
Panelist(s) Presentation

**Location**  
Cherry, Bekaert, &  
Holland  
1934 Old Gallows Road  
4th Floor  
Vienna, VA 22182  
703-506-4440

**CXO Forum**

FOUNDING PARTNER



STRATEGIC PARTNERS



For information, contact  
Neal G. Koller  
President, CXO Forum  
President & CEO,  
PluroGen Therapeutics, Inc.  
443.994.0101  
nkoller@cxoforum.com

focused upon delivering consistent investment returns to other entrepreneurs and high net worth individuals. The firm publishes for its clients “MoneyWise” and the “Loper Report” and its hallmark is providing active investment management free from influence by larger financial organizations. Brad’s broad perspectives and entrepreneurial leaning are evident in his investment style.

**Jeff Carlton** (BS, CIMA)  
**Senior Vice President, Wealth & Advisory Services, UBS**



Jeff Carlton is a highly recognized financial advisor serving a wide array of small, mid-size and private corporations as well as high wealth individual clients for over 25 years. Awards include

Washingtonian Magazine’s “Who’s Who Among Stockbrokers in DC”, Virginia Business “Winners Circle” as a top financial advisor in Virginia, and a member of IMCA. Prior to joining UBS in Sept. 2007, Jeff spent 16 years at Smith Barney/Citigroup and was one of the top one percent of financial advisors at the firm. His broad and deep experience from a slightly different perspective will create excellent diverse views for the CXO Forum.

**CXO Personal Toolbox** is designed to deliver skill sets that CXOs can put to immediate use in their respective business environments.

**CXO Update** is designed to deliver relevant information on business topics.

**CXO Roundtable** is designed to engage each forum participant in an open discussion of ideas and issues relevant to managing a business.

All formats deliver valuable intellectual capital useful in managing a business.

## Please Join Us and Bring a Guest to These Future CXO Forum Meetings

All CXO Forums are the second Thursday of the month  
*(except where noted)*

**7:30 am to 9:15 am**

7:30 to 7:45 am — Networking

7:45 to 8:00 am — CEO Round Table

8:00 to 9:15 am — Forum

<b>1/8/09</b>	<b>CXO UPDATE</b>
<i>Financial Forecast 2009 -2010: After the financial meltdown, how do you invest?</i>	
Organizer	<b>Jim Handlon, CEO, Bottomline Partners</b>
Panelists	<b>Jim Hoban, Managing Director, Ridgewood</b> <b>Brad Loper, Founder / Partner, DouglasBradley</b> <b>Jeff Carlton, Senior Vice President, UBS</b>
<b>2/12/09</b>	<b>CXO UPDATE</b>
<i>How to Take Advantage of a Recession to Grow Business</i>	
Organizer	<b>Michael Velotta, CTO Lore System</b>
Panelist	<b>Eric Koefoot, Partner, Ascend Sales Partners</b>
<b>3/12/09</b>	<b>CXO PERSONAL TOOLBOX</b>
<i>Executive Level Presentations</i>	
Organizer:	<b>Bob Morgan, President, Bottomline Partners</b>
Presenter:	<b>Charlotte Graham, Training Director, Simply Speaking</b>
<b>4/9/09</b>	<b>CXO UPDATE</b>
<i>Strategic Incentive Compensation</i>	
Organizer:	<b>Clark Childers, Cherry, Bekaert &amp; Holland</b>
<b>5/14/09</b>	<b>CXO ROUNDTABLE</b>
Shared Learnings from CXO Members: Best Practices in Business Growth	
Organizer:	<b>Alicia Sutton, Chief Strategy Officer, Omnia Education</b>
Presenters:	<b>CXO members in roundtable format</b>
<b>6/11/09</b>	<b>CXO UPDATE</b>
Technology	
Organizer:	<b>Jim Handlon, CEO, Bottomline Partners</b>