



MARCH TO SUCCESS WITH MARCH MADNESS

CMAC SPRING 2010 CONFERENCE



**WEDNESDAY THROUGH FRIDAY
MARCH 24-26, 2010**

THE LAGUNA CLIFFS RESORT & SPA

25135 PARK LANTERN, DANA POINT, CALIFORNIA 92629

(949) 661-5000 | WWW.LAGUNACLIFFS.COM

OUR DESTINATION

THE LAGUNA CLIFFS RESORT & SPA

25135 Park Lantern
Dana Point, CA 92629
(949) 661-5000
www.lagunacliffs.com

Discover a remarkable setting along the Pacific Coast at the Laguna Cliffs Resort & Spa, A Marriott Resort. Overlooking the 2,500-yacht-slip Dana Point Harbor and 10 miles of pristine beach, this location is perfect for relaxing in the sun, enjoying ocean adventures, taking in the local scenery, or embarking on day outings to see the wonders of Southern California. Dana Point is conveniently situated between Los Angeles and San Diego - one hour from both - and is only a short drive from the John Wayne Orange County Airport. Experience a new level of tranquility at this AAA four-diamond California beach resort, overlooking the Pacific from a memorable, coastal setting.

ROOM RESERVATIONS

Guestroom reservations for this event may be made by individuals calling the Resort directly at (949) 661-5000 between the hours of 8:00 am and 6:00 pm, Monday through Friday and 9:00 am and 4:00 pm on Saturday. In order to receive

the special group guestroom rate of \$209.00 per night, individuals must identify themselves as attending the Cemetery and Mortuary Association of California [CMAC] event.

Please note: Reservations must be received on or before Friday, February 19, 2010 to receive the CMAC rate.

THE SPA AT LAGUNA CLIFFS

The Spa at Laguna Cliffs is built upon the most picturesque spots in Orange County, along the Southern California coast. Yet their vision extends far beyond the panorama of the dramatic hillside bluffs and the beautiful Pacific Ocean. The Spa was created with a commitment to authenticity, in every aspect of the treatments, services and products provided. Their philosophy is to offer results-oriented treatments using the highest-quality products for a truly therapeutic benefit. The signature treatments embrace centuries of healing traditions from cultures around the globe using a holistic model of wellness that promotes the health and well-being of the total person.

While the services are beneficial, the Spa has a relaxed atmosphere and is colorful, comfortable and casual. Here, the conversation is easy and life is always good.

Reservations for The Spa may be made by calling (949) 487-7576 or online at www.lagunacliffs.com

EVENTS

JACK WEST MEMORIAL GOLF TOURNAMENT

Bella Collina Towne & Golf Club
200 Avenida La Pata
San Clemente, CA 92673
(949) 498-06604
www.bellacollinagolf.com

Located in San Clemente and approximately 7 miles from the Laguna Cliffs Resort & Spa, the newly renovated Bella Collina Golf Club features three 9-hole golf courses all designed by the world-renowned golfer, Gary Player. Each course is named after one of Player's British Open triumphs - Muirfield, Carnoustie and Royal Lytham. Each course has a unique layout taking full advantage of the beautifully-landscaped rolling hill terrain of San Clemente.

Participation in the Jack West Memorial Golf Tournament at Bella Collina Golf Club includes round of golf, cart, range balls, boxed lunch, beverage tickets and prizes. All skill levels are welcome to participate in this enjoyable and relaxing event. All registered golfers, prior to the tournament, will receive a golfing agenda which will list foursomes, check-in time and directions from the Laguna Cliffs Resort & Spa.

"MARCH TO SUCCESS WITH MARCH MADNESS" DINNER

Let the Madness begin! In the spirit of the "March Madness" college basketball finals, Thursday night Reception and Dinner attendees and guests are encouraged to wear attire from their alma mater or favorite college team.

GUEST AND SPOUSE BREAKFAST AND TOUR

Guests and spouses of our conference attendees are invited to participate in the Special Spring Conference Breakfast and Tour. Guests will be treated to a leisurely breakfast followed by a specially planned event. Details will be forthcoming.



TENTATIVE SCHEDULE OF ACTIVITIES

WEDNESDAY, MARCH 24, 2010

- 7:45 am – 2:30 pm Jack West Memorial Golf Tournament, Bella Collina Towne & Golf Club
- 12:00 pm – 5:00 pm Vendor Display Set-up
- 12:00 pm – 6:00 pm In-person Registration
- 4:00 pm – 5:00 pm CISA Meeting
- 5:00 pm – 6:00 pm CMAC Board of Directors Meeting
- 6:00 pm – 7:30 pm Opening Night Reception

THURSDAY, MARCH 25, 2010

- 7:30 am – 12:00 pm Registration
- 7:30 am – 8:30 am Breakfast
- 7:45 am – 8:15 am Vendor Introductions during Breakfast
- 8:30 am – 8:45 am General Session Welcome
Annual CMAC Membership Meeting
- 8:45 am – 9:30 am Robert Nichols, Ph.D., *"Endowment Care Investments"*
- 9:30 am – 10:15 am Adam Sheer, *"Investment Strategies"*
- 9:30 am – 10:30 am Guest Breakfast
- 10:45 am – 3:00 pm Guest Tour
- 10:15 am – 10:45 am Break
- 10:45 am – 11:45 am Suzanne Davidson, Esq., Kenneth Ehrlich, Esq., Dennis Madison,
"Discharge of Storm Water Associated with Construction Activities"
- 12:00 pm – 1:45 pm Luncheon
- 2:00 pm – 2:45 pm Pat Severo, CIMA, AIF, *"Practices That Define a Prudent Investment Process for Fiduciaries"*
- 2:45 pm – 3:30 pm David Daniels, Esq., *"California Wage & Hour Law"*
- 3:30 pm – 4:00 pm Break
- 4:00 pm – 4:45 pm Gary O'Sullivan, CCFE, *"Corporate Culture"*
- 4:45 pm – 5:30 pm President's Meeting with Vendors
- 6:00 pm – 7:00 pm Reception (*Wear your college jerseys!*)
- 7:00 pm – 9:00 pm Dinner (*Wear your college jerseys!*)

FRIDAY, MARCH 26, 2010

- 8:00 am – 9:00 am Breakfast
- 9:00 am – 10:00 am Jerry Desmond, Jr., Esq., *"California Legislative Update"*
- 10:30 am – 12:00 pm Vendor Display Take-down



SPEAKERS

DAVID DANIELS, ESQ.

Partner, Gurnee & Daniels, LLC

David Daniels was admitted to the State Bar of California in 1994. Since then, he has practiced exclusively in the field of civil litigation primarily from the defense perspective. He has a wide range of experience in courts throughout California in cases involving professional negligence, product liability, medical malpractice, employment law, construction defects, business transactions and general personal injury.

Mr. Daniels is a native of Sacramento. He graduated from Santa Clara University in June 1987 with a Bachelor of Science degree in combined Sciences (emphasis in Chemistry and Biology). Following graduation, he became a sales representative with Marion Merrell Dow, Inc., managing the sales and use of pharmaceutical products and designing and implementing research protocols for teaching hospitals in Arizona and New Mexico.

In 1993, Mr. Daniels graduated from the Creighton University School of Law, Omaha, Nebraska, where he received Honors for "Outstanding Service to the Community" and the Christian Leadership Award for "Outstanding Leadership to the Students."

He is a Judge Pro Tem in El Dorado and Placer Counties. He joined the law offices of Steven H. Gurnee & Associates in July 2000, and in January 2003, was named partner. He continues to specialize in the representation of defendants in complex construction defect litigation, employment law, business transactions and other professional liability matters.

Mr. Daniels is admitted to the practice before all courts in the State of California. Mr. Daniels is a member of the Association of Defense Council of Northern California, the Association

of Defense Trial Attorneys, the American Bar Association, and the Sacramento and Placer County Bar Association.

SUZANNE DAVIDSON, ESQ.

Forest Lawn Memorial – Parks & Mortuaries

Suzanne Davidson is a California attorney who has been employed in Forest Lawn's Legal Department for 17 years. She received her bachelor's degree from the University of California at Berkeley and her law degree from the University of California at Los Angeles. Her practice is concentrated in the areas of cemetery and mortuary operations, real estate, construction and environmental law.

JERRY DESMOND, JR., ESQ.

Executive Vice-President, CMAC

Mr. Desmond has served as the Association's Executive Vice President since his selection in the Spring of 2005. He oversees the operation of the Association, its programs and services. He is also the CMAC's legislative advocate, providing government affairs representation before the State Legislature as well as the agencies and departments in the executive branch.

Mr. Desmond will provide our attendees with an overview of the state regulatory and legislative issues in which the Association is actively engaged. Information will be provided on the new 2010 legislative proposals that will have been introduced prior to the commencement of the conference, as well as the ongoing issues. These include:

- Anticipated CFB regulations establishing minimum maintenance standards for cemetery authorities.
- Implementation of the requirement that members begin collecting the \$8.50 fee for any burials, entombments, cremations, and/or inurnments that are conducted on or after January 1, 2010.

- ARB regulations establishing monitoring and servicing requirements for refrigeration units.

KENNETH EHRLICH, ESQ.

Partner, Jeffer, Mangels, Butler & Marmaro, LLP

Ken Ehrlich represents clients in all aspects of environmental litigation, regulatory and administrative matters in state and federal courts and agencies, including CERCLA, RCRA, Clean Water Act, CEQA, Coastal Act, common law claims and related insurance coverage matters. He also counsels clients in regulatory oversight, enforcement, entitlement and compliance matters concerning project development, facility operations, redevelopment and expansion and the purchasing, leasing and selling of environmentally contaminated parcels. Mr. Ehrlich has significant experience resolving petroleum MTBE, water quality, Chromium-6, chlorinated solvent, perchlorate, toxic mold, asbestos, indoor air quality, lead paint, and Proposition 65 matters.

DENNIS MADISON

Environmental Compliance Manager, Forest Lawn Memorial – Parks & Mortuaries

A Southern California native, Dennis Madison received both his Bachelor's degree in Civil Engineering and a Master's in Environmental and Occupational Health from California State University at Northridge.

As Forest Lawn's Environmental Compliance Manager, Dennis is responsible for ensuring compliance with environmental health and safety regulations, which primarily includes the areas of air quality, water quality, waste management, land use, and safety.

A Registered Environmental Health Specialist with the State of California, Dennis also is a current member of the Air and Waste Management Association, the California Environmental Health Association, and holds two certificates in Hazardous Materials and Waste Management.

ROBERT NICHOLS, PH.D

CEO, Windward Capital

Mr. Nichols is founder of Windward Capital Management Co. For twenty-one years (1971 to 1992) prior to founding Windward, he was President of the Roley, Nichols Capital Group, Inc., in Los Angeles, California. While at the firm, he was Chairman of the Roley, Nichols Mutual Fund Group, managing seven publicly traded mutual funds, and President of RNC Capital Management Co., a portfolio management firm managing more than \$1.25 billion in portfolios of taxable, municipal, corporate and multi-employer retirement plans and foundation clients. In addition to his corporate responsibilities, he was a senior member of the Investment Policy Committee and Research Committee. In 1990, he and his partners sold the firm to an Austrian bank. His academic degrees include an MBA and a Ph.D. in Management from the Claremont Graduate School. Mr. Nichols has served as the Public Appointed Member of the Los Angeles Unified School District Pension Fund, Trustee of the Marine Corps Command and Staff College Foundation, Board of Trustees of Buena Vista University, and Board of Counselors for the School of Fine Arts at the University of Southern California (USC).

GARY O'SULLIVAN, CCFE

President, The Gary O'Sullivan Company

Gary O'Sullivan, CCFE, entered the industry in 1971 and is today president of the Gary O'Sullivan Company, a consulting firm specializing in the cemetery and funeral professions with proven success in strategic planning, development, management, and leadership of operational initiatives in sales and marketing.

An accomplished platform speaker, teacher and motivator, Gary has a unique way of creating synergistic alignment of personal and corporate values and personal accountability.

Gary O'Sullivan was recognized as the speaker of the decade by the International Cemetery and Funeral Association in 2000. He received his Honorary Doctorate Degree from ICCFA University in 2008. Today he continues to be one the nation's most sought-after and top-rated speakers.

PAT SEVERO, CIMA, AIF

Senior Vice President, RBC Dain Rauscher

Pat has been an Investment Advisor since 1985. He started his career with Merrill Lynch and was there for fifteen years prior to joining RBC Dain Rauscher. He graduated from Virginia Tech in 1983 with a Bachelor of Science Degree. Pat is Series 7, 63, and 65 (Registered Investment Advisor) licensed. He also holds a license in Life & Disability Insurance and Fixed & Variable Annuities. In the spring of 2000, Pat completed the CIMA (Certified Investment Management Analyst) designation that is offered only through the prestigious Wharton Business School of the University of Pennsylvania. He also recently completed the Accredited Investment Fiduciary Program at the University of Pittsburgh.

ADAM SHEER

President, Roosevelt Investment Group

Adam Sheer became President of The Roosevelt Investment Group, Inc in 2002, having previously been with the predecessor firm Sheer Asset Management since 1994, where he was responsible for business development, strategic planning and all phases of client service. Adam's prior experience also includes serving as the Director of Tourism for the Center for Jewish-Arab Economic Development and while working with Sheer Asset Management, Adam was the President of the Suppliers to the New York State Association of Cemeteries. Currently, he serves as a trustee of the Foundation board for SUNY State College of NY. Adam received his undergraduate degree in Economics from Brandeis University.

CMAC SOUTHERN PROGRAM COMMITTEE MEMBERS

Kevin Brown, Chair
Inglewood Park Cemetery

Scott Drolet
Forest Lawn Memorial –
Parks & Mortuaries

Terri Gonzalez
Ivy Lawn Memorial Park

Dave Hepburn
States West Cemetery Services

Merrill Mefford
Rose Hills Company

Marcia Nixon
Crystal Cathedral
Memorial Gardens

Marla Noel
Fairhaven Memorial
Park & Mortuary

Leo O'Conner
Fairhaven Memorial
Park & Mortuary

Angie Ray
Matthews International

John Resich, Jr.
Green Hills Memorial Park

Steve Schacht
SCI – California Funeral Services

Mike Wesner
Catholic Cemeteries of the
Diocese of Orange

Dave Worker
Rose Hills Company

THINGS TO DO

DANA POINT HARBOR

The Dana Point Harbor offers specialty shopping, fishing and whale watching excursions, kayaking, Catalina transportation, and a variety of restaurants from coffee shops to fine waterfront dining. Across the bridge to Dana Island, more walking paths lead to yacht clubs, a restaurant and a continuation of the quiet waterside parkways.

BEACHES

Dana Point beaches are among the finest in the world. Dana Point is rich in surf history and is popular for surfing, tide pool exploration, walking and ocean enjoyment. Come and play at Salt Creek Beach, Doheny Beach, Baby Beach, or Capistrano Beach!

OCEAN INSTITUTE

The Ocean Institute is an incredible educational resource with children's day camps, overnight experiences, and boat excursions from themed pirate ship trips to wildlife cruises. The Ocean Institute has several educational sea exhibits. Located on a secluded beach with tide pools, and accessed from the Dana Point Harbor, the entire experience is a hands-on, authentic ocean experience. For more information, contact the Ocean Institute at (949) 496-2274.

WHALE WATCHING

Dana Point is known as the "Whale Capital of the West" because several types of whales use the point as a navigational landmark on their migrations north or south. Dana Point Harbor whale watching boats provide amazing experiences with these majestic animals off the Dana Point coast.

FISHING

Dana Point has been known as a rich fishing area for centuries. Fishing boats out of Dana Point Harbor offer excursions for young and old, for new and the most experienced fisherman.

SHOPPING

Dana Point has many shopping options for locals and visitors. Specialty shops abound for surf wear, home décor, gifts, flowers, candy, apparel or general goods. Small centers and independent boutique shops and the Dana Point Harbor satisfy the shopper's needs and wants with unique items.



CMAC 2010 SPRING CONFERENCE REGISTRATION

Please mark your calendars for the 2010 Spring Conference and register now by completing the following and returning it to us:

BY MAIL: Cemetery and Mortuary Association of California [CMAC]
925 L Street, Suite 220
Sacramento, CA 95814

BY FAX: (916) 441-3520

BY EMAIL: cmac@usa.net

QUESTIONS: (916) 441-4533

PLEASE REGISTER

PROPERTY NAME _____

ADDRESS _____

CITY _____ STATE _____ ZIP _____

PHONE _____

ATTENDEE NAMES AND EVENTS

(Please circle your attendance activities as listed under the Events and Fees section on next page)

If you would like to receive 2010 Spring Conference updates by email, please include individual email addresses with the names of attendees as listed below.

NAME _____

EMAIL _____

1 2 3 4 5 6 7 8 9 AMOUNT DUE: \$ _____

NAME _____

EMAIL _____

1 2 3 4 5 6 7 8 9 AMOUNT DUE: \$ _____

NAME _____

EMAIL _____

1 2 3 4 5 6 7 8 9 AMOUNT DUE: \$ _____

NAME _____

EMAIL _____

1 2 3 4 5 6 7 8 9 AMOUNT DUE: \$ _____

NAME _____

EMAIL _____

1 2 3 4 5 6 7 8 9 AMOUNT DUE: \$ _____

TOTAL DUE: \$ _____

PAYMENT OPTIONS

CHECK: _____ (Please make checks payable to CMAC)

CREDIT CARD: _____ VISA _____ MASTERCARD _____ AM/EX

CARD NUMBER | | | | | | | | | | | | | | | | | | | | | |

EXP. DATE _____ THREE DIGIT SECURITY CODE _____

AMOUNT TO BE CHARGED: \$ _____

BILLING NAME _____

BILLING ADDRESS _____

CITY _____ STATE _____ ZIP _____

EVENTS AND FEES

1. JACK WEST MEMORIAL GOLF TOURNAMENT

Includes: Continental Breakfast, Round of Golf, Cart, Boxed Lunch, Beverages, and Prizes

\$130.00 PER PLAYER

2. CMAC CEMETERY MEMBER FULL CONFERENCE

Includes: Opening Reception, (2) Buffet Breakfasts, All General Sessions, Luncheon, Thursday Reception and Dinner, Legislative Update

\$475.00 PER PERSON

3. CMAC ASSOCIATE MEMBER FULL CONFERENCE

Includes: Opening Reception, (2) Buffet Breakfasts, All General Sessions, Luncheon, Thursday Reception and Dinner, Legislative Update and Vendor Display Table

\$525.00 PER PERSON

4. CEMETERY NON-MEMBER FULL CONFERENCE

Includes: Opening Reception, (2) Buffet Breakfasts, All General Sessions, Luncheon, Thursday Reception and Dinner, Legislative Update

\$675.00 PER PERSON

5. SUPPLIER NON-MEMBER FULL CONFERENCE

Includes: Opening Reception, (2) Buffet Breakfasts, All General Sessions, Luncheon, Thursday Reception and Dinner, Legislative Update and Vendor Display Table

\$675.00 PER PERSON

6. GUEST FULL CONFERENCE

Includes: Opening Reception, Guest Breakfast and Tour, Thursday Reception and Dinner, Buffet Breakfast

\$385.00 PER PERSON

7. CMAC CEMETERY MEMBER

GENERAL SESSION ONLY (THURSDAY)

Includes : Buffet Breakfast, General Sessions and Luncheon

\$375.00 PER PERSON

8. THURSDAY RECEPTION AND DINNER ONLY

Includes: Thursday Reception and Dinner

\$165.00 PER PERSON

9. GUEST BREAKFAST AND TOUR

Yes, I would be interested in attending the Guest Breakfast and Tour. Fee is included with Guest Full Conference registration.

INCLUDED

CONFERENCE SPONSORSHIP OPPORTUNITIES ARE AVAILABLE

The generous sponsorship contributions of individuals and companies are welcomed and appreciated!

For more information, please feel free to contact Southern Program Committee Chair, Kevin Brown, Inglewood Park Cemetery at (310) 412-6500.

This sponsorship form can be faxed to CMAC at (916) 441-3520 or mailed to CMAC at 925 L Street, Suite 220, Sacramento, CA 95814.

Questions? Please call us at (916) 441-4533.

SPONSOR

NAME _____

COMPANY _____

ADDRESS _____

CITY _____

STATE _____

ZIP _____

PHONE _____

EMAIL _____

SPONSORSHIP LEVELS

_____ **PLATINUM** \$1000 AND ABOVE

_____ **GOLD** \$750

_____ **SILVER** \$500

_____ **BRONZE** \$250

SPONSORSHIP TOTAL: \$ _____