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Green Practices

Opening the Window to Green

By Jennifer Beever

Last year one of my clients launched a green product, and I did extensive marketing research, analysis and implementation in the green space. When three ProVisors members in one week suggested that I attend the Green Affinity group, I decided it was time to investigate the newest addition to ProVisors' special interest groups.

At the Green Affinity Group you will find ProVisors members and guests with a wide range of green experience: from business performance and sustainability consultant **Jeff Hayes** [BW] whose personal and business carbon footprint appears on his business card and financial advisor **Brandi Howell** [UNI] who focuses on green investment portfolios for her clients, all the way to those with little knowledge of green practices who want to learn to better serve their clients and to reduce their environmental impact.

According to group founder **Jeff Kleid** [NPC], CEO of his new insurance firm Elite Risk Services, the purpose of the Green group is to share experiences, opportunities, and ideas that help members protect and grow clients' businesses and teach them to apply green best practices and social entrepreneur skills. Jeff feels so strongly about green issues, he chooses companies with which he will work based on their adoption of paperless work environments and green best practices.

Host **Tom Barry** [SBAY], CPA and head of the Environmental Services practice for Green Hasson & Janks LLP, has found that going green helps with client retention and attraction. Tom's clients include a manufacturer of waterless urinals, a company that recycles tires to make football fields, as well as many environmental companies. The fact that Green Hasson & Janks has environmental policies in place

makes a difference to his clients. And, hosting the group has further increased his firm's green practices. "When we had the first meeting of the Green Affinity group, I saw that we needed a better recycling program and made it happen."

For **Chuck Kiskaden** [UNI], Employee Benefits Insurance Broker from Stone Tapert, the affiliation with green pays off. One of Stone Tapert's clients was going for LEED certification, and Chuck "got higher on the food chain" when he was selling to the account because of his affinity for green. **Sara Dineen Harris** [SM4], real estate and transactional attorney with Rutter Hobbs & Davidoff, has found that as more people want to go green, they want to work with an attorney who shares their passion. In addition, Sara has been able to educate clients and expose them to green ideas that they may not have been aware of.

The first meeting I attended featured guest speaker and architect Lori Selcer, of HOK Interiors, who presented a case study on a LEED Gold-certified building built by Symantec in Culver City. LEED is the standard set by the US Green Building Council to foster energy savings, water efficiency, CO2 emissions reduction, improved indoor environmental quality, and stewardship of resources and sensitivity to their impacts. The meeting was arranged by LEED Accredited commercial real estate tenant representative **David Callahan** [UNI] of Cresa Partners. This building has reduced water flow by 17%, harvested timber by 25%, and carbon dioxide emissions by 33%. According to Lori, while the initial cost of building was higher, the energy cost savings over time will reach 30-35%.

In May Tom Barry presented information on the Obama Recovery and Reinvestment Act of 2009 with specific focus on tax

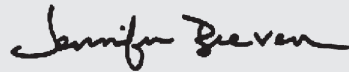
Letter from the Editor

With this issue of *Trusted Advisor*, we move toward an outward-focused publication that will better serve ProVisors members and the business community. In our lead story, **Rocky Mills** constructs a Know-Like-Trust-Refer pyramid to describe the stages of connecting with other members. We highlight seven members with case studies that show how they provided solutions for their clients. We hope these generate more referrals and get forwarded to business owners in like industries and situations.

Marla McCutcheon, the new Group Leader for IRC, wrote about how ProVisors members track results of their networking efforts. **Pam Leven** contributed the Goings On column about members' volunteer efforts and **Cindy Rakowitz** contributes with an article about married members. **Tim Gallagher** informs on how members (and their clients) can get press

by submitting well-written Op Ed pieces to hungry editors. Tim should know – he's the former publisher and president of *The Ventura County Star*. The affinity group featured in this issue is the Green Affinity Group, which meets for lunch on the third Wednesday of the month at Green Hasson & Janks LLP to create awareness and referrals in the green space.

We welcome your client case study in fewer than 300 words, following the Problem-Solution-Results case study format. If you'd like to write an article that will add value for ProVisors members and their clients, please contact a member of the newsletter team, listed on page three. Articles should be brief (500 words or less) and relevant photos are encouraged.



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credits related to green and environmental issues. Tom pointed out the \$4.3 billion home energy credit of 30% of installation cost (up to \$1,500) for homeowners who install energy efficient windows, doors, furnaces and air conditioners, as well as a new allowance for companies to use current losses to offset profits made in the previous five years, instead of the previous two years.

Other meetings at the Green Affinity group include announcements about green networking events, conferences, and business opportunities. **Tracy Kwiker**

[CAL] shared presentation materials from a conference call on how to access green federal stimulus funds. Attorney and business consultant **Mike Leventhal** [WLA] brought up the subject of how digital media was converging with green, using the example of Google's \$10-million investment in green energy. **Elizabeth Wheeler** [LA1] CEO of Purchase Planners Group, an interiors company with a green focus, shared that she had adopted social networking so that she could better reach her target audience.