

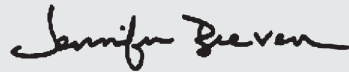
## Letter from the Editor

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.



## NEWSLETTER TEAM

### Jennifer Beever

New Incite  
Phone: 818/347-4248  
Email: [jenb@newincite.com](mailto:jenb@newincite.com)

### Joseph M. Cobert, Esq.

Joseph M. Cobert, a Professional Corp.  
Phone: 818/986-4200  
Email: [jm@sprynet.com](mailto:jm@sprynet.com)

### Roger Gillott

Gillott Communications LLC  
Phone: 310/826-8696  
Email: [roger@gillottcommunications.com](mailto:roger@gillottcommunications.com)

### Pam Leven

[www.wordswillfly.com](http://www.wordswillfly.com)  
Phone: 310/391-3978  
Email: [pleven@pobox.com](mailto:pleven@pobox.com)

### Marla McCutcheon

Synergy Media & Consulting  
Phone: 949/861-8260  
Email: [marla@synergymediapr.com](mailto:marla@synergymediapr.com)

### Cindy Rakowitz

BR public relations  
Phone: 818/783-3307 x112  
Email: [cindy@brpublicrelations.com](mailto:cindy@brpublicrelations.com)

### Deborah Rodney

The Next Level Marketing  
& Creative LLC  
Phone: 310/477-2119  
Email: [deborah@tnlmarketing.com](mailto:deborah@tnlmarketing.com)

### Eric Taub

Jet Media  
Phone: 818/707-1080  
Email: [eric@taub.com](mailto:eric@taub.com)

Submit all articles to ProVisors  
Articles edited by Rick Rhoads [EM]  
[rick@profitwriter.com](mailto:rick@profitwriter.com)

Newsletter Production  
[sandicumminsdesign.com](http://sandicumminsdesign.com)  
[tnlmarketing.com](http://tnlmarketing.com)

## About the Editor



**Jennifer Beever** [WLK2] is the CMO for Hire and Inbound Marketing Certified Professional who drives better marketing results with strategic thinking, marketing planning and implementation. You can reach Jennifer at [jenb@newincite.com](mailto:jenb@newincite.com) or 818/347-4248.

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.