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## ***Somerset Practical MBA Program*** ***August 26, 2009*** ***Investment Fundamentals***

This session will focus on the fundamentals of investing. Different types of investment vehicles will be discussed along with when they may be appropriate. We will also address why a plan is important, how to devise a plan, common mistakes people make and why diversification is important. The overall goal of the session is to help individuals get on track to developing wealth.

- When: Wednesday, August 26, 2009  
 7:45 a.m. to 8:00 a.m. - Registration/Continental Breakfast  
 8:00 a.m. to 10:00 a.m. - Seminar
- Where: Somerset Conference Center  
 3925 River Crossing Parkway, First Floor  
*\*If you cannot attend in person, you may participate via live webinar simulcast. Please see our website for details.*
- Facilitator: Patrick J. Early, CPA, CFP
- Fee: None

Our Practical MBA Program is a series of complimentary seminars that will be held over the course of two years, much like a traditional MBA program. We hope you will join us.



Register by calling our RSVP line, 317-472-2570 or 800-469-7206 ext. 2570.



Register online at [www.somersetcpas.com](http://www.somersetcpas.com) or by e-mail to [seminars@somersetcpas.com](mailto:seminars@somersetcpas.com).



A lifelong resident of Indianapolis, Pat Early joined Whipple & Company in 1979 and became president in 1989. Upon Whipple's merger with The Somerset Group, he was named president of the new organization. He continues as President of Somerset CPAs, P.C., a full service accounting, tax, consulting and wealth management firm with over 120 employees. In addition to being a CPA, Pat also has the Certified Financial Planner and Personal Financial Specialist designations. Pat works with owners of privately held businesses regarding tax, estate planning, financial planning and wealth accumulation issues. He has also successfully negotiated many business sales and purchases. Throughout his career, he has served in a variety of civic positions including the presidency of Girls, Inc., and the Penrod Society and as a board member for the Indianapolis Convention and Visitors Association, Wishard Hospital Foundation and the Indianapolis Project. Pat has also received the Indiana CPA Society award for public service and the Council of the Sagamores of the Wabash award for outstanding leadership. In 2008, Pat was recognized as an Estate Planning & Trust Super CPA by the Indiana CPA Society. Graduating from Purdue University with a B.S. in management, he has been the recipient of the Purdue School of Management Accounting Alumnus of the Year award. Currently, Pat serves as the Chairman of the Department of Natural Resources Advisory Council and serves on the Department of Natural Resources Commission. He is on the boards of Bishop Chatard High School and The Hundred Club of Indianapolis. Pat is past-president and current vice president of the Capital Improvement Board of Marion County. He was instrumental in making Victory Field and Conseco Fieldhouse realities for the city of Indianapolis. Pat is also a member of the Young President's Organization.

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