



TAG

Advisors Bureau



The Appleton Group, Inc.

TAGLaw® & TIAG®

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TAG

A d v i s o r s B u r e a u

A L E T T E R T O M E M B E R S



The goal behind TAG Advisors Bureau is to provide our members with a stable of expert resources and consultants that will help you be more competitive, successful law and accounting firms.

In our first stage, we have recruited experts in the areas of Firm Management, Strategic Marketing, Business Development, Graphic Design and Technology. Each of the Advisors is enthusiastic about the prospect of getting to know TAGLaw & TIAG members, working with them for success, and strengthening the network.

These advisors come highly recommended. They have a proven track record of success in improving their clients' professional competitiveness, visibility in the marketplace, and financial footing. Most of the firms have been used by either The Appleton Group or our member firms. The advisors offer a host of services - we've mentioned only a few of their capabilities here.

Full firm profiles, advisor bios, and contact information is provided in this TAG Advisors Bureau Directory and will be available on the TAGLaw and TIAG Websites.

Sincerely,

Peter Appleton Jones, Chairman
The Appleton Group, Inc.

"Management is efficiency in climbing the ladder of success; leadership determines whether the ladder is leaning against the right wall."

– Stephen R. Covey
Author of *Everyday Greatness*



F i r m M a n a g e m e n t

SMOCK•STERLING

Strategic Management Consultants

Strategic Management Consulting

Strategic Planning or Management | Mergers & Combinations | Practice Group Management
Law Firm Economics

Smock Sterling

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www.smocksterling.com

Smock Sterling Strategic Management Consultants is a small, fully integrated strategic management consulting firm serving law firms (our primary strategic industry focus), professional service firms, and commercial entities. Founded in 1991, we have seen our law firm practice grow from 25% of our revenues to a steady state of 70% of those revenues.

The primary success factor for any consulting firm is the results achieved by our clients – in both the near and long term. Our law firm client references can speak directly to those results.

Our “first string” (Smock, Sterling, and Giuliani) is, simply, the most experienced group of senior consultants serving the legal profession. The three partners bring a collective 94 years of experience to our practice.

We tailor our approach to every consulting assignment to the unique needs and requirements of the client. We are known for our originality and creativity in doing that and for our scrupulous avoidance of “law firm management dogma.”



John S. Smock

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John Smock is a Partner with and the co-founder of Smock Sterling Strategic Management Consultants and the leader of our law and professional services firm management consulting practice. He has 37 years of experience as a management consultant with functional specialties in strategic management and planning and overall professional service firm management – as well as strong experience and credentials in a wide variety of commercial industries.

Examples of John's experience relevant to professional service firms follows:

- He has directed and/or participated in over 200 assignments for law firms of all sizes, with a focus on larger firms. Examples of consulting assignments include:
 - Development of firm wide strategic plans for a wide range of national and regional multi-office law firms using Smock Sterling's proprietary planning methodology (FOCUS)
 - Review and analysis of firm wide and practice group organizational, managerial, and governance structures and development of specific recommendations resulting in management improvement steps, practice-wide strategic plans, and/or marketing programs
 - Evaluation and revision of partner compensation systems and partnership structures.
- John has also been heavily involved in law firm mergers and combinations – merger criteria development, candidate search and evaluation, strategic due diligence, assistance in negotiation and structure (e.g. – new firm strategic plan, partner compensation, etc.), and combined firm integration.
- Additionally, he has widely written and spoken on law and professional service firm management and has conducted numerous retreats and management planning sessions for firms and other professional groups.

Prior to founding Smock Sterling, John spent over sixteen years with Arthur Young (ten as a partner) and, prior to that, three years with Cresap, McCormick & Paget. At Arthur Young, he served as Managing Partner of the Arthur Young/Chicago Consulting Group, National Director of General Management Consulting, Managing Partner of the Gulf Coast Consulting Group, National Director of Marketing Planning in the National Office in New York, Director of Management Consulting for the Florida Practice, and National Director of Criminal Justice Services in Washington, DC.

John has a B.S. in Economics from Villanova University and an M.B.A. with a Finance Concentration from the University of Chicago Graduate School of Business. He is a Certified Management Consultant. John also served as a regular commissioned officer in the United States Navy on surface ships and in combat on the rivers of Vietnam.

SMOCK•STERLING

Strategic Management Consultants



John W. Sterling

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John Sterling is a Partner with and the co-founder of Smock Sterling Strategic Management Consultants. He has over 23 years experience in the areas of strategic management and marketing – 19 as a consultant. John has developed expertise in several industries throughout his consulting career and has a depth of experience in the professional services industry. John's qualifications for serving professional service firms include:

- Strategic management, market research, and marketing planning assignments for over 60 law firms, including the following recent examples:
 - Leadership of the strategic planning process for a wide range of law firms (from small to very large) – often utilizing highly participative processes that lead to broad agreement on firm wide strategic direction.
 - Practice group organization, planning and operational improvement projects – including organization of large, generalist litigation departments into market and industry responsive practices, as well as strategic plans that identified profitable market segments and created strategies to grow the practice in those areas.
 - Conduct of proprietary market research projects focused on due diligence regarding the market reputations of potential merger partners. These research projects have been carried out on behalf of leading law firms actively pursuing firm combinations in major U.S. cities.
 - Research on and profiling of merger and acquisition candidates – driving short list development, informing initial contact with potential partners, and highlighting issues for further investigation and negotiation.
 - Leadership of projects involving detailed analysis of prospective merger partners' finances, cultural alignment and strategic synergies.

Prior to joining Smock Sterling, John was a Senior Consultant with Ernst & Young's Great Lakes Strategic Management and Marketing Group and was a Senior Policy Analyst at The University of Illinois at Chicago.

John has a B.S. in Advertising, magna cum laude, from the University of Illinois - Urbana/Champaign and an M.B.A. with honors from the University of Illinois at Chicago with concentrations in Strategic Management and Marketing.



Peter A. Giuliani

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Peter Giuliani is a Partner at Smock Sterling Strategic Management Consultants. His law firm management experience spans more than 39 years, both as a management consultant to law firms and other professional service firms (32 years), and as Executive Director of Cummings & Lockwood, a 180-lawyer law firm based in Stamford, Connecticut (7 years). His functional specialties include strategic planning; financial management and law firm economics, administrative and technology infrastructure planning; strategic mergers, acquisitions, and divestitures; and practice group management.

Examples of Peter's consulting experience are as follows:

- He has directed, conducted or participated in more than 350 consulting assignments for law firms and corporate law departments.
- Peter has also served as expert witness in over twenty litigation matters involving valuation of partnership interests, determination of "reasonable compensation," measurement of lost profits, and other matters.
- He is the principal author of two extensive monographs on financial management of law firms published by the American Bar Association. In addition, he has published more than 25 articles on legal management topics.

During the seven years in which he served as Cummings & Lockwood's first-time Executive Director, Peter led and/or supported processes as varied as creation of a two-tier partnership program; development of a new partner compensation system; conversion to an LLC; revision of firm governance; acquisition and divestiture of practices and offices; and formation of ancillary businesses.

Prior to joining Cummings & Lockwood, Peter was a consultant with four major consulting firms. He spent five years as Vice President and CFO of Altman Weil and five years as a Partner in Pensa International, a firm that he helped found and that merged with Altman Weil in 1991. He was a Principal and Partner at Arthur Young, where he also served as National Director of Legal Consulting Services. He began his consulting career in 1968 at the New York Office of Price Waterhouse.

Peter has an A. B. in Economics and Philosophy from The College of the Holy Cross and an MBA in Managerial Economics and Finance from Cornell University. He is also a Certified Public Accountant (inactive status) and a Certified Management Consultant. In 1998, Peter was elected a Fellow of the College of Law Practice Management in recognition of his career-long dedication and contribution to improving the management of law firms.



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Steve Erickson, CPA, LLC
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Are you wasting valuable professional time? Are your partners & employees competing for resources? Not using standard processes? Constantly putting out fires? Confused about the strategy of the firm? These problems cause excessive internal competition and organizational stress resulting in poor client service, high staff turnover and reduced profitability.

Steve Erickson helps firms build the culture needed to attract and retain staff while increasing profitability. A nationally recognized consultant to accounting firms, he specializes in solving the partner and people issues that limit the success of accounting firms. Steve knows how to work with firms to achieve long-term results. Through his "Valued Professional Advisor" programs, Steve helps develop leadership among firm members to build value.



Steve Erickson

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Coaching and mentoring managing partners, other partners, and firm staff members to achieve organizational goals through personal development is Steve's passion. Through his programs, he guides the development of leadership among firm members to build strong firm profitability and long-term value.

A former managing partner of a large accounting firm, Steve knows how to work with firms to achieve long-term results. He has over 30 years experience dealing with the challenges facing public accounting firms.

Steve is a masterful presenter and gifted teacher—one of a handful of CPAs who belong to the National Speakers Association. He speaks frequently at national, international, and state professional conferences, and in 2004, 2005 and 2006 he has been listed as one of the most recommended consultants in the United States by Inside Public Accounting.

In addition, he has written extensively for professional publications and is frequently quoted in national news and professional periodicals, most recently The Journal of Accountancy, The Practical Accountant, Accounting Today, Inside Public Accounting, Bowman's Accounting Report, Partner Advantage Advisory, WebCPA and AccountingWEB as well as many newspapers nationally.

Steve is a member of the Professional Coaches and Mentors Association, the International Association of Facilitators, the AICPA and NMSCPA.

"The problem is never how to get new, innovative thoughts into your mind, but how to get old ones out."

– Dee Hock
Founder & Former CEO of VISA



S t r a t e g i c M a r k e t i n g & B u s i n e s s D e v e l o p m e n t

Larry Bodine

Marketing

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Larry Bodine Marketing

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Larry Bodine Marketing is a business development firm that advises law firms on how to get new business and generate more revenue. With offices in Arizona and Illinois, the firm has helped teams of lawyers bring in \$1 million in less than a year, and helped individuals multiply their revenue by up to 12 times to \$2.5 million per year.

Law firms get these results through:

- Training programs and firm retreats
- Individual coaching for lawyers on business development
- Law firm business development strategies
- Using technology to market their services.

Our clients are as large as a 3,000 lawyer global law firm to a 30-lawyer trial boutique, yet each one receives personal service. In operation since 2000, we take a common-sense, nuts-and-bolts, practical approach to business development, and concentrate on techniques that really work to bring in new business.



Larry Bodine

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Larry Bodine is a business development advisor who helps law firms generate revenue and get new business by:

- Training lawyers at firm retreats. At one-day or half-day programs, lawyers learn all the business development techniques that work, and are steered away from those that don't. A retreat is an ideal kick-off event to launch a business development initiative.
- Coaching lawyers to develop their personal marketing plans. Using his proprietary four-page form, lawyers will meet with Larry to create a plan to pursue clients, referral sources, cross-selling opportunities and organizations of clients. Typically, lawyers will multiply their revenues once a plan is in place.
- Developing business development strategies. As a result, firms can identify their most lucrative, ideal clients; develop pursuit teams to acquire them; identify target industries where they have strength; have a five-year vision for the firm; and use a series of tactics to succeed.
- Using technology to market a practice. Blogs, podcasts, Webinars, e-Newsletters and Web sites extend a lawyer's marketing reach, and work for a lawyer around the clock.

He has 15 years' experience as a journalist, serving as Editor and Publisher of the American Bar Association Journal and other news publications. In addition, Larry Bodine is a Technolawyer Legal Technology Consultant of the Year, and an Edge Award winner, for writing the best article published in the ABA's Law Practice magazine: "What the Web Can Do for You," November/December 2002 Issue (Vol. 28: No. 8).

Larry conducts online Web Seminars on business development and marketing. See www.PBDI.org. He is also a well-known speaker on business development topics, including presentations for the American Bar Association Annual Meeting, the Chicago Bar Association, ALM's LegalTech, the Legal Marketing Association, the Association of Legal Administrators, the Community Associations Institute and the Hildebrandt Institute.

He practiced law in Madison, Wisconsin and is a cum laude graduate of both Seton Hall University and Amherst College.



Client Service Consultant

Client Feedback Programs | Creating Client Service Strategies

Meherg Consulting
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Listening to your clients is the single most effective marketing tool you have. It's amazing what you can learn from your clients by listening.

By asking simple questions, you can discover opportunities for new business. You can uncover problems before they become fatal to your relationship. And you can turn good clients into strong advocates for your firm. That said, it's amazing how few firms listen well.

In our experience, clients want to talk to you. They want to tell you what you do well and where your firm could improve. But most of the time, they won't start the conversation until it's too late to save the relationship. They'll only talk if you ask, and many won't express their true feelings to their regular contacts. That's where we can help.

We get your clients talking.

Using what we learn during our proprietary interviews, we can help you make your firm better and more profitable. We've done this for years and the results our approach creates are compelling. We help firms develop client-service initiatives based on direct client feedback, opinions and preferences to strengthen, protect and expand client relationships.



Laura Meherg

laura@mehergconsulting.com

Laura helps firms develop and implement client feedback interview programs to support overall business development strategy. She helps firms build better client relationships by conducting face to face interviews with key personnel in their client organizations. These candid conversations help firms better understand client preferences, uncover performance problems, gather competitive intelligence and uncover new opportunities. Using the direct feedback from clients, she then works with the firm to create actionable follow-up strategies.

Laura also works with firms to develop a process for better managing client service teams and provides individual and team business development coaching and training. She regularly facilitates GC roundtables for Martindale-Hubbell's Counsel-to-Counsel Forum series and other in-house counsel programs. She is a frequent speaker at legal marketing educational programs.

From 1998 to 2005, Laura worked as director of client services and marketing for Burr & Forman, a law firm with 200 attorneys and offices in Alabama, Georgia and Mississippi. While at Burr & Forman, Laura initiated a client service review program and helped develop multi-disciplinary client service teams. At Burr & Forman, Laura's responsibilities covered every aspect of marketing and training. She managed the firm's long range planning, industry and practice group development, sales and business development training, branding and image development, attorney coaching, consultant selection and oversight, budget development, and all areas of general marketing from developing collateral, special events, educational programs, Web site development, database design and implementation, research, RFP responses, media and community relations.

Laura was named Marketing Director of the Year by the Elite Excellence in Legal Marketing Awards at the 2004 Marketing Partner Forum. She is a past- President of the Southeastern Chapter of the Legal Marketing Association (LMA) and recently served on the board of directors of the LMA as Secretary and Member at Large. She currently serves as Chairman of the Board for Kid One Transport Systems of Alabama and volunteers with Girls Inc.



Branding & Positioning

Graphic Design | Printing Services

Paula Black & Associates

3006 Aviation Avenue, # 3B, Coconut Grove, Florida 33133

Ph: +1 305 859 9554

www.paulablack.com

Paula Black & Associates is a versatile graphic design and marketing company that provides creative solutions with a design-driven philosophy and strong marketing expertise. We have extensive resources for exploring innovative solutions to your communications and marketing objectives, and the capability to meet tight deadlines and budgets.

We believe that each client has unique marketing, design and communication objectives and, therefore, each deserves unique and creative solutions. Our team of skilled and dedicated professionals ensures a collaborative and focused approach to all marketing challenges. We don't just work at being creative ... we make creativity work.



Paula Black

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As founder and president of Paula Black & Associates and the award-winning author of "The Little Black Book on Law Firm Branding and Positioning," Paula Black has delivered powerful and innovative marketing and graphic design solutions for over twenty years.

Among her firm's greatest strengths is the branding and positioning of law firms. Ms. Black has advised law firms for years, assisting them with everything from designing memorable logos and standout marketing materials to dealing with the sensitive subject of shortening a firm's name. She drew on that experience to write "The Little Black Book," which the Independent Publisher Book Awards recognized as the 2006 Business Breakthrough Book of the Year as well as one of the Ten Outstanding Books of the Year.

Whether a firm has two attorneys or two thousand (and, over the years, Ms. Black has worked with firms of both sizes and everything in between) her focus remains constant. She helps firms separate themselves from their competitors and achieve the growth they desire through powerful branding. Coupled with her invaluable marketing experience across a wide range of industries, this commitment enables Ms. Black to deliver rich, results-driven marketing solutions.

In addition to her marketing and graphic design work, Ms. Black serves on the Board of Directors of two U.S. companies, MD Spas and RZN Nutraceuticals, and a Latin American company, Raphia. She is also actively involved in community service, sitting on the boards of the YES Institute and Strategic Mindshare Foundation.



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Shift Works Strategic Business Coaching
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Coaching is the method I use to deliver powerful training, retreats, mentorship, and one-on-one coaching support to lawyers and legal administrators in the areas of marketing, business development, leadership, organizational skills development and time management.

Coaching supports active learning that takes place in the course of the regular business day and is put to work through practical action. Too often lawyers are sent off to seminars and conferences only to return to the firm and – because of their busy schedules and pressures – fail to put any of the new knowledge into practice. Coaching is based on the principle that nothing is actually learned until it is meaningfully applied.



Allison Wolf

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Allison Wolf is the founder of Shift Works Strategic Inc., a company focused on using the practice of coaching to enhance the performance and success of lawyers in key business areas.

Allison is a certified executive coach and legal marketing professional. Over the past ten years she has advised hundreds of professionals on the marketing of their practices and on their business development efforts. Her clients have achieved success in a number of areas including: developing powerful rainmaking skills, launching profitable new practice areas, expanding existing practice areas, revitalizing practices, transitioning lateral hires, leading practice groups, and attaining partnership.

Allison has worked for law firms of all sizes and scope, beginning with an international law firm in the Beijing, New York and Washington D.C. offices, followed by a national Canadian firm and most recently Harper Grey LLP. Allison speaks English, French and Mandarin. She brings a unique international experience to her strategic business coaching practice. She lived, worked and studied in China for eight years.

Allison is the President of the LMA Vancouver Chapter and a member of the International Coaching Federation. She is the President of the Pacifica Family Addictions Foundation, a non-profit society. She has a B.A. from McGill University, and holds an Executive Coaching Certification (CEC) from Royal Roads University. She conducted graduate studies in Communications and East Asian Studies at McGill University and the Beijing Film Academy.



Marketing Consultant

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TheRemsenGroup
655 Sherwood Road NE, Atlanta, GA 30324
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www.theremsen.com

TheRemsenGroup is a marketing consulting firm that works exclusively with law firms to help them develop and implement proven cost-effective marketing and business development programs. Formed in 1997, our firm has worked with over 125 law firms and thousands of lawyers. Most of our clients are mid-sized commercial law firms, ranging in size from 15-250 lawyers.

Our core services include:

- Firm-wide and Practice Group Marketing Plans
- Firm Retreats and Marketing Presentations
- Client Feedback Programs
- Recruiting Marketing Staff

Through our network of alliances and affiliations, we also provide law firms with the following marketing services:

- Branding and Firm Identity Programs
- Newsletters, Brochures and Other Collateral Material
- Client Seminars and Appreciation Events
- Websites and Electronic Newsletters
- Marketing Databases
- Media and Public Relations
- Sales Training and Coaching for Lawyers



John Remsen, Jr.

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John Remsen, Jr. is widely recognized as one of the country's leading authorities on law firm marketing.

After holding two in-house marketing positions at major law firms, John formed TheRemsenGroup, a marketing consulting firm that works exclusively with law firms to help them develop long-term marketing strategies and implement proven, cost-effective business development programs. Since 1997, he has worked with over 125 law firms and thousands of lawyers. Most of his clients are mid-size commercial law firms with 25-250 lawyers.

John has served on the national Board of Directors of the Legal Marketing Association (LMA) and was President of its Southeastern chapter for three years. In addition, he was Executive Editor of Strategies, LMA's monthly newsletter. He is a member of The Florida Bar's Standing Committee on Advertising and the only non-lawyer appointed to serve on its new Advertising Task Force.

John is a frequent speaker and author on law firm marketing topics. He has spoken at national and regional conferences of the Legal Marketing Association, the Association of Legal Administrators, and numerous state and local Bar associations. His articles have appeared in such well-respected publications as Legal Management, Marketing for Lawyers, Marketing the Law Firm, Managing Partner, Rainmaker's Review, Florida Bar News, New York Law Journal, Asian Lawyer and Lawyers Weekly.

Since 2002, John has provided an unsurpassed networking and learning opportunity to over 450 law firm leaders from 375 law firms through his Managing Partner Forums. Designed exclusively for law firm managing partners to help them more effectively lead their firms in today's increasingly competitive marketplace, the Forum series has expanded from its original geographic base in Florida to encompass programs in such major legal marketplaces as Atlanta, Chicago, Dallas, Houston and St. Louis.

A native of West Palm Beach, Florida, John holds an MBA degree from The University of Virginia (1985) and a Bachelor's degree in Business Administration from the University of Florida (1980).

“Information technology and business are becoming inextricably interwoven. I don’t think anybody can talk meaningfully about one without the talking about another.”

– Bill Gates
Co-Founder & Former CEO of Microsoft



T e c h n o l o g y S u p p o r t



Professional IT Services

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www.deepcoolclear.com

DeepCoolClear, LLC is a consulting shop specializing in delivering custom software solutions to its clients. These include developing full featured website development, developing and deploying business tools and automation/integration software, and other data and infrastructure services. DeepCoolClear is based in Austin. Its development team is located in New Delhi, India. We can service your needs worldwide.

Our services are characterized by professionalism and quality. Interaction with clients, including all requirements analysis and specification, is primarily directed from the US. The completed work specifications are sent to New Delhi where the software is built to Spec. Our services feature responsive client interaction, clear and objective statements of work, and transparency in estimating efforts and costs.



Girish Altekhar

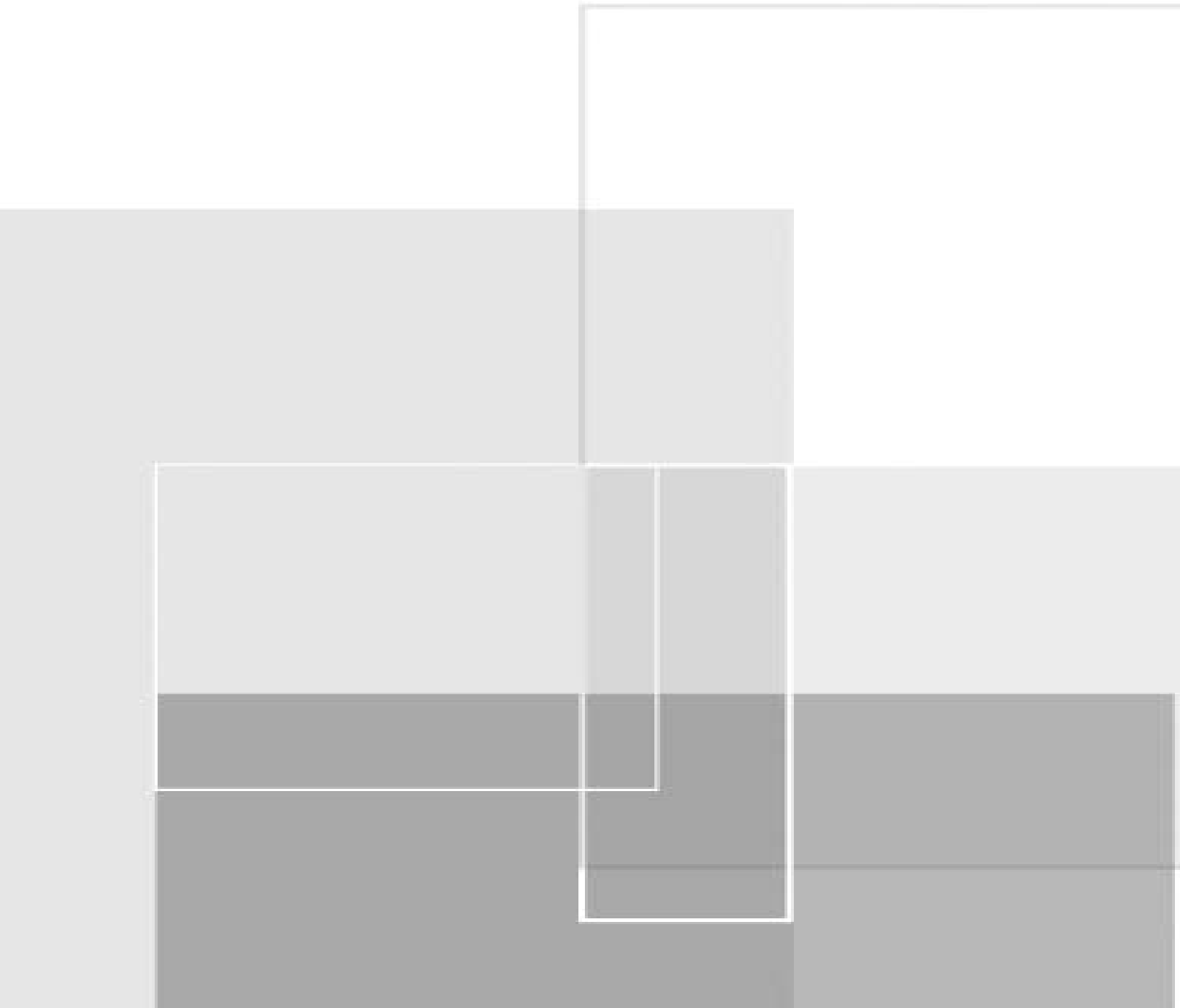
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Girish Altekhar is the founder and the president of DeepCoolClear, LLC. His career spans over 25 years in various technology development, marketing and management roles at companies such as Tandem Computers, Data General, and Unisys. At these companies, he has led large development teams involved in bringing complex technology solutions to market.

In the last 10 years since founding DeepCoolClear, Girish has been focused on providing high quality consulting services to his clients. The services range from insightful analysis of business problems facing clients, to solution recommendations and implementation. In this time, he has helped many startup companies define product/market strategies, articulate them through business plans, and has helped them achieve success through implementation. His current focus is expanding the company's commercial WiFi hotspot and software development businesses.

Girish has a bachelor's degree in Electrical Engineering from IIT Bombay, a MS in Computer and Systems Engineering from RPI, in Troy, NY, and an MBA from the University of Texas.

A D V I S O R S A T A G L A N C E



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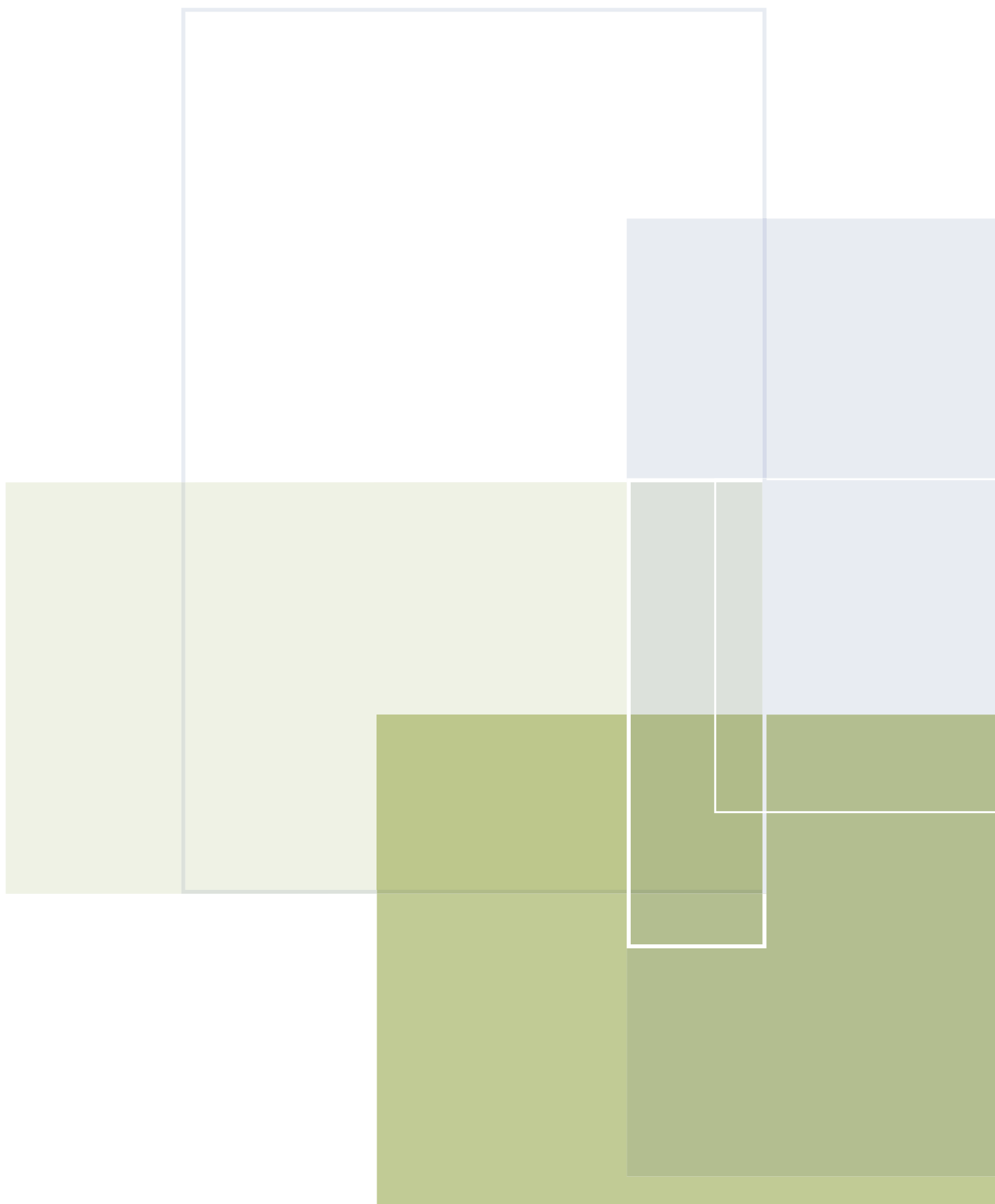
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N O T E S



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A d v i s o r s B u r e a u



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