Society of Financial Examiners

A Tradition of Excellence in Examination

July 29–August 1, 2007

Marriott Crystal Gateway
Arlington, VA
Learning Objectives

Through lectures, roundtable discussions, and interactive formats, participants in the Society of Financial Examiners’ 2007 Career Development Seminar will learn of the latest developments, current issues and new solutions in the areas of regulation of banks, insurance companies, and credit unions. Issues will include the risk-focused examination procedures, fraud detection, IT development, latest legislation, auditing, and current challenges facing the industry.

SOFE Pins

If you wear your SOFE pin to the 2007 CDS, your name will be entered into a drawing and there will be 10 chances to win a gift. You received a SOFE pin upon joining the Society as either a General Member or Associate Member and then upon receiving your AFE and CFE designations. If you cannot locate your pin, we will be selling them at the registration desk for $5 each. And once you have this shiny, new pin, you can proudly wear it all the time.

Course Level

This course is offered for Intermediate and Advanced Financial Examiners. No advanced preparation or prerequisites are necessary, as this course will provide group-live delivery of updates and overviews of knowledge to which examiners are already exposed.

Total number of CRE hours: 25
Total number of CPE hours available: 87

FIELDS OF STUDY OFFERED:
Auditing 32
Computer Science 23
Regulatory Ethics 1
Specialized Knowledge 31

AFE/CFE Examinations Will Be Available

SOFE is offering the AFE/CFE Examinations at CDS on Wednesday, August 1 from 8:00 am to 12:00 noon. You must register for the July test period by the June 22nd deadline. The cost of the examinations will remain the same. SOFE will provide a room in which to take the examination, internet access and a proctor. If you are planning to take advantage of this option, please let us know as soon as possible (even though you cannot actually register until June) by checking the appropriate box on the Registration Form on page 7, so that we can plan the room needs accordingly. If you have any questions, please contact Jeanne Lachapelle at jeanne@sofe.org or 800-787-7633.

Hotel Reservations: Marriott Crystal Gateway

1700 Jefferson Davis Highway
Arlington, VA 22202
(Minutes from downtown Washington, DC)

The hotel room rates are
- Single  -  $139/night
- Double  -  $159/night
- Triple  -  $179/night
- Quad  -  $199/night

Local taxes are 10.25%, but are always subject to change. The phone number to make your reservations is either 800-228-9290 or 703-920-3230. Tell them you are with the Society of Financial Examiners. Please be advised that the Marriott’s corporate policy is to charge your credit card with a one-night guarantee. This is fully refundable if the room is cancelled seven (7) days prior to the date of arrival.

While the hotel cut-off date is June 29, we encourage you to make your reservations as soon as possible to ensure that you are not barred from the room block. Once our room block is gone, the rates will go up significantly. If you make your reservations early, it will give us more leeway in managing the room block and adding additional rooms, if necessary, or dropping unneeded rooms so we are not charged for them.

Dress

The dress for this conference will be business casual.

The hotel has informed SOFE that they usually keep the hotel very cool during the summer months. It is recommended that the participants dress in layers with jackets and sweaters available to adjust to cooler classrooms.
**First-Time Attendee Special Registration Rate**

There is a special rate for firms/departments that send two or more first-time attendees to CDS. If the firm/department sends two or more first-time attendees to the 2007 CDS, each attendee will receive a 50% discount on the applicable registration fee, whether they are a SOFE member or not. To register for this rate, please complete the appropriate box on the registration form and attach a list of the names of the other attendees from your firm/department that qualifies you for this discounted rate. Or alternatively, all of the applications may be submitted at one time.

Also, note that all First-Time Attendees are invited to attend the State Chair/First-Time Attendee Social on Saturday, July 28 from 7-9 pm. If you will be attending this function, please check the box on the Registration Form for the event.

**Spouse/Guest/Youth Hospitality Registration**

SOFE is pleased to offer a Hospitality Suite to the spouses, guests and youths of our attendees. The Hospitality Registration fee is $125 per person if postmarked by 6/23 and $175 per person if postmarked on or after 6/23. The following benefits are offered to Hospitality Registrants:

- Access to the hospitality suite where spouse/guest/youth gather for networking, catching up with old friends, and making new ones
- A place to relax and unwind or meet with friends to venture out to see the sights of DC
- A continental breakfast on Monday, Tuesday, and Wednesday in the hospitality suite
- Sunday night social including:
  - Transportation from the Marriott Gateway Hotel to the event at Union Station
  - Heavy hors d’oeuvres and host beer and wine bar
  - Entertainment for the evening
  - Transportation and tour of DC

Please note that spouse/guest/youth registrations do not include breakfasts, lunches or coffee breaks with the conference participants. You may take advantage of the option to join the conference participants for these functions by registering for each of the individual functions you wish to attend on the registration form.

**What does Registration Include?**

The registration fee for Members, Non-Members, Retired Members and First-Time Attendees are listed on the Registration Form on page 7. The fee for these categories includes the Sunday Social, seminar sessions, Monday lunch, Tuesday lunch, 3 breakfasts and all coffee breaks.

The registration fee for Spouse/Guest/Youth includes only the Sunday Social and the Hospitality Suite (see the previous section for details on those benefits). It does not include any of the meals offered to the attendees such as the breakfasts, lunches and coffee breaks. If you want to join the attendees for any of these meal functions, you must purchase these individually on the Registration Form on page 7 in the top right corner.

**SOFE is Rolling Into DC...**

Join us on Sunday, **July 29** as SOFE will be celebrating our history of excellence in the city with the most history. We will be making tracks to Union Station. Our Sunday Social will be held in the historical Union Station American Restaurant which is located on three floors and overlooks all the hustle and bustle of Union Station. Union Station was completed in 1908 and is considered to be one of the finest examples of the Beaux-Arts style of architecture. At the time it was built, the Station covered more ground than any other building in the United States and was the largest train station in the world. For over 90 years, Union Station has welcomed people to the most important city in the world. This magnificent building has even played host to 17 Presidents and countless foreign dignitaries. However, what may be most impressive is the fact that Union Station's marble floors echo with the footsteps of over 29 million people each year, making it the most visited site in all of Washington, DC.

Brush up on your American trivia. You never know when it might pay off (not in a pay off bribe sort of way - well you know what we mean). We will feature heavy hors d’oeuvres and a wine/beer bar. Bring your cameras. You just never know who you might encounter.

Union Station offers exciting and dynamic shopping options. The quality and diversity of its stores have made it the choice of Presidents as well as millions of busy commuters and wide-eyed tourists each year. There are two levels of concourses, each lined with stores whose names you’re sure to recognize. You will find specialty boutiques, fashion and gift stores, and other shops offering Washington souvenirs and much, much more. Arrive early and enjoy all that Union Station has to offer.

On our return, we will enjoy DC After Dark. We will have a tour of the sites on the way back to the Marriott by the lights of DC. Touring DC after dark is an exciting and special way to see the sights.

Please note that the American restaurant is located on three floors and does not have an elevator. We will offer all items served on each of the floors. You will be able to enjoy all the evening offers whether on the lobby level or the top floor of this magnificent facility.
Society of Financial Examiners
2007 Career Development Seminar

SATURDAY, JULY 28, 2007

12:00 n – 6:00 pm Registration Desk Open
1:00 – 3:00 pm Committee Meetings
3:00 – 6:00 pm Executive Committee Meeting
7:00 – 9:00 pm State Chair/First-Time Attendee Social
Sponsored by Stroock & Stroock & Levan LLP and Eide Bailly LLP

1:00 – 3:00 pm Committee Meetings
3:00 – 6:00 pm Executive Committee Meeting

SUNDAY, JULY 29, 2007

8:00 am – 5:00 pm Registration Desk Open
8:30 – 12:00 pm Board of Governors Meeting
Sponsored by Eide Bailly LLP

12:30 – 5:00 pm Spouse & Guest Hospitality Suite
Sponsored by Noble Consulting Services, Inc.

1:00 – 1:30 pm GENERAL SESSION
Welcome & Opening Comments
Donald A. Crawley, CFE, CPA
Vice President of CDS
Maryland Insurance Administration
Stephen Szypula, CFE
President of SOFE
Florida Department of Insurance
Thomas E. Hampton, Commissioner,
DC Dept. of Ins., Securities, and Banking

1:30 – 3:00 pm A1–Ethics
Marsha Egan, CPCU, PCC, ICF
Certified Life Coach

3:00 – 3:30 pm Break

3:30 – 5:00 pm A2–Testimony of Companies Avoiding Insolvency
David Ficca, Baltimore Life Insurance Co.
Mark Singleton, Union Labor Life Ins. Co.

6:00 – 11:00 pm Sunday Social
Sponsored by Eide Bailly LLP and Bingham McCutchen

MONDAY, JULY 30, 2007

7:00 am – 5:00 pm Registration Desk Open
7:15 – 8:15 am BREAKFAST ROUNDTABLES
Sponsored by AEGON Insurance Group

B1–2007 Changes to the Financial Conditioners Handbook
Sherry Shull, NAIC
Sherry Flippo, NAIC

B2–TBD
William C. Harrington, CFE, CPA
Ohio Department of Insurance

B3–New Tricks for ACL
Jenny Jeffers, CISA, AES
Jennan Enterprises
Brian Dunn, CFE, INS Consultants
Frances Stuart, NAIC
Darin Benck, CFE, CPA, RSM McGladrey

B4–Finding Fraud in Examination
Michael O. Lyon

B5–21st Century Risk Surveillance Documentation
George Lentini, CISA, INS Services

B6–IT Asset & Information Security–Key Elements in Regulatory Compliance
Frank Mascarenhas, eCompliantz, Inc.

B7–Financial Analysis for Beginners
Les Hatley, Invotex Group

B8–SAP Updates
Robin Marcotte, CFE, CPA, ARE, NAIC

B9–Risk Transfer in P&C Reinsurance Contracts
Charles Letourneau, FCAS, MAAA
American Actuarial Consulting Group
Joseph W. Pitts, FCAS, MAAA
American Actuarial Consulting Group, LLC

B10–Risk Focused Concepts for Small Companies
Patrick Tracy, AFE, RSM McGladrey
Craig Moore, CFE, CPA, RSM McGladrey

# – Qualifies as IT continuing education for the AES Designation.
= – Basic Track for examiners.
TUESDAY, JULY 31, 2007

7:00 am – 5:00 pm  Registration Desk Open

7:15 – 8:15 am  BREAKFAST ROUNDTABLES
Sponsored by Johnson Lambert & Co.

C1–Accreditation Update
Julie Glaszczak, NAIC
Jeff Loomis, NAIC

C2–21st Century Risk Surveillance
Documentation Q&A
Claude Granese, ???, INS Services
George Lentini, CISA, INS Services

C3–Computer Forensics: Theory and Potential...is it Science or Art?
Scott Green, Great Scott Enterprises, Inc.

C4–ACL for Beginners
Frances Stuart, NAIC

8:00 am – 5:00 pm  Spouse & Guest Hospitality Suite
Sponsored by Noble Consulting Services, Inc.

8:30 – 10:00 am  BREAKOUT SESSIONS
C5–Financial Restructuring Tools for Troubled Insurers
Douglas A. Hartz, MBA, JD, CIR-ML
Bingham McCutchen

C6–Casualty Actuarial Task Force’s Suggestions
Donald Carbone, CFE, CIE, ARe, AIAF, ARC, INS Regulatory Insurance Services
Ken Weine, AIR, JVP Partners

C7–Web App Hacking 101: Is Your Website an Open Door for Hackers?
Michael Sutton, S.P.I. Dynamics, Inc.

C8–Understanding the P&C Business
TBD, RSM McGladrey

C9–Introduction to Regulating of Solvency for Beginning Examiners–Financial Regulatory System
David Vacca, NAIC
Sherry Flippo, NAIC
Julie Glaszczak, NAIC
Jeff Loomis, NAIC

10:00 – 10:30 am  Break

10:30 – 12:00 pm  BREAKOUT SESSIONS
C10–Commissioner’s Panel–Hot Issues Facing Insurance
Thomas E. Hampton, Commissioner
DC Dept. of Ins., Securities and Banking
Alfred W. Gross, Commissioner
Virginia Bureau of Insurance

C11–Integrating the IT Review on Risk Surveillance
LeAnn Creevy, RSM McGladrey
Adam Sarote, RSM McGladrey
Craig Moore, CFA, CPA, RSM McGladrey

C12–XBRL Statutory taxonomy for the Beginning Financial Pages for the Life and Property Statements
Gary Wicklund, Capricorn Research

– Qualifies as IT continuing education for the AES Designation.
– Basic Track for examiners.
C13–Captive Insurance–The Basics 
Judy Nako, CFE, CPA  
Hawaii Insurance Department  
Derick White, CFE  
Vermont Insurance Department  
Sandra Bigglestone, CFE, CPA  
Vermont Insurance Department

12:00 n – 1:15 pm  
Luncheon  
Sponsored by Invotex Group

12:00 n – 1:15 pm  
State Chair Luncheon & Business Meeting  
Sponsored by RSM McGladrey

1:30 – 3:00 pm  
GENERAL SESSION  
C14–Fraud  
John Hall, John Hall Consulting/INS Regulatory Insurance, Inc.

3:00 – 3:30 pm  
Break

3:30 – 5:00 pm  
BREAKOUT SESSIONS  
C15–The Role of the CPA for Insurers  
Jim Murphy, Johnson Lambert & Company  
C16–The Supervisory Plan–Communication of Examination Results  
Patrick Tracy, AFE, RSM McGladrey  
Annette Knief, CPA, RSM McGladrey  
10:00 – 10:30 am  
C17–180/360 Degree ISQ (A View You Should Consider)  
Brad Myers, CISSP, CISA, CISM, PMP  
Noble Consulting Services  
10:30 – 12:00 pm  
C18–Corporate Governance–Exhibit M  
Mike Kogut, CPA, INS Regulatory Ins. Svcs.  
Bob Rodack, CFE, INS Regulatory Ins. Svcs.  
Bill Harrington, CFE, Ohio Dept. of Insurance

C19–Assessing Risk  
James A. Goldsmith, CFE, CIA, CISA, VALIC

Wednesday, August 1, 2007

7:00 am – 1:00 pm  
Registration Desk Open

7:15 – 8:15 am  
BREAKFAST ROUNDTABLES  
Sponsored by Westmonte & Associates, Inc.

D1–Considerations of Companies in Runoff, Receiviership and Guaranty Funds  
David Vacca, NAIC

D2–OPEN  
TBD

D3–Computer Forensics: Hardware and Software tools/Show and Tell  
Scott Green, Great Scott Enterprises, Inc.

D4–Investment Basics  
Alex Hart, Maryland Insurance Admin.

8:00 am – 12:00 n  
Spouse & Guest Hospitality Suite  
Sponsored by Noble Consulting Services, Inc.

D5–REO Proposal–New Federal Bill on Non-Admitted Surplus Line Carriers  
Donald Carbone, CFE, CIE, ARE, AIAF, ARC, INS Regulatory Insurance Services  
Joseph Fritsch, New York Insurance Dept.

D6–Lessons Learned–Risk Assessment  
Tom Finnell, Invotex Group

D7–Exhibit C in a Risk Surveillance World  
Claude Granese, INS Services  
George Lentini, CISA, INS Services

D8–Understanding the L&H Business  
TBD, RSM McGladrey

10:00 – 10:30 am  
Break

10:30 – 12:00 pm  
BREAKOUT SESSIONS  
D9–Derivatives–Basic Concepts  
Joe Prakash, NAIC

D10–Risk Assessment–How It Developed and What to Do Now  
David DelBiondo, CPA  
Pennsylvania Insurance Department

D11–Information InSecurity  
Taiye Lambo, CISSP, CISA, HISP, BS7799 Auditor, eFortresses, Inc.

D12–Mutual Insurers–The Challenges They Face  
Will Fowler, The Cumberland Ins. Group

D13–Teammate Training  
Marlin D. Kroenke, CFE, CPA, CISA, AES Kansas Insurance Department

12:00 n – 3:00 pm  
Board of Governors Meeting  
Sponsored by Noble Consulting Services, Inc.

If you are running for the Board, please make your travel arrangements to allow attendance at this meeting.

3:00 – 5:00 pm  
Executive Committee Meeting

‖ – Qualifies as IT continuing education for the AES Designation.  
🌟 – Basic Track for examiners.
Registration Form
Society of Financial Examiners (SOFE)
2007 Annual Career Development Seminar
Sunday–Wednesday, July 29–Aug. 1, 2007
Marriott Crystal Gateway, Arlington, VA

Please type or print:

Name: _____________________________________________________________________________________________

Designation (s): ____________________________________ First name and state for badge: _______________________

Agency name or company: _____________________________________________________________________________

Mailing Address: ____________________________________________________________________________________

City / State / Zip: ___________________________________________________________________________________

Telephone: (_______)______________________________ Daytime Phone: (_______)____________________________

Email: _____________________________________________________________________________________________

Spouse / Guest’s name – if attending: __________________________________________________________________

Youth’s name (s) and age (s) – if attending: ________________________________________________________________

Credit Card No.: ______________________________________________________________ Exp. Date: _______________

Signature: __________________________________________________________________________________________

In an effort to be socially conscience, to contain cost, to ensure that SOFE is able to maintain registration fees, and provide the most accurate count to the hotel for our meal functions, please advise us which of the following functions you plan to attend:

- Saturday, July 28, State Chair/First-Time Attendee Social
- Sunday, July 29, Night Social
- Monday, July 30, Annual Business Luncheon
- Tuesday, July 31, General Luncheon OR
- State Chair Luncheon representing the state of ____________________________

Please indicate your session attendance preference on reverse.

For the latest schedule of 2007 CDS events, including general sessions, on-line registration form, please refer to SOFE’s website, www.sofe.org.

Please indicate if any of the persons registering need any of the following special considerations:

Name of person: ______________________________________________________________

- hearing impaired (H)
- speech or language impairment (S)
- difficulty walking distances (D)
- other disability (describe) (X)

wheelchair accessibility (W)

- visually impaired (V)
- learning disabled (L)

How can we best accommodate your needs? ____________________________________________

You will be contacted to confirm the auxiliary aid or services to be provided. Every reasonable effort will be made to accommodate special needs.

- Please send me information on joining SOFE.
- I will take an AFE/CFE Examination on Wednesday, August 1, at CDS.
  You MUST register for the test as usual on the website at www.sofe.org. Please list Don Crawley as your proctor and we will know you are taking it at CDS.

You must return both sides of this form to be registered.

Circle applicable fees:

<table>
<thead>
<tr>
<th>Postmarked before 6/23</th>
<th>Postmarked after 6/23</th>
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</thead>
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<tr>
<td>Members of SOFE *</td>
<td>$ 410</td>
</tr>
<tr>
<td>Non-members Examiners*</td>
<td>$ 515</td>
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<tr>
<td>Retired Members *</td>
<td>$ 270</td>
</tr>
<tr>
<td>Spouse/Guest/Youth</td>
<td>$ 125</td>
</tr>
</tbody>
</table>

(See page 3 for complete explanation of items included in the Spouse/Guest/Youth registration options.)

First-Time Attendee

50% off Applicable Rate Applies; See attached information with qualifying names.

Note: Registration fee is subject to forfeiture if SOFE is notified of a cancel-lation less than fifteen (15) days prior to the meeting date. A $50 administration charge will be applied to all cancellations after July 11. Please fax or e-mail SOFE for all cancel-lation/substitutions. For more information regarding administrative policies such as complaints and refunds, please contact Paula Keyes, Executive Director, at 800-787-7633. All complaints will be addressed within 14 days of receipt.
2007 CAREER DEVELOPMENT SEMINAR

Society of Financial Examiners (SOFE)
Sunday–Wednesday, July 29 – August 1, 2007
Marriott Crystal Gateway, Arlington, VA

Please select the breakout sessions of your choice listed below.

SUNDAY, JULY 29
1:30–3:00 pm General Sessions:
- A1–Ethics

3:30–5:00 pm
- A2–Testimony of Companies Avoiding Insolvency

MONDAY, JULY 30
7:15–8:15 am Breakfast Roundtables:
- B1–2007 Changes to the Financial Conditioners Handbook
- B2–TBD
- B3–New Tricks for ACL

8:30–10:00 am Breakout Sessions:
- B4–Finding Fraud in Examination
- B5–21st Century Risk Surveillance Documentation
- B6–IT Asset & Information Security – Key Elements in Regulatory Compliance
- B7–Financial Analysis for Beginners
- B8–SAP Updates

10:30–12:00 pm
- B9–Risk Transfer in P&C Reinsurance Contracts
- B10–Risk Focused Concepts for Small Companies
- B11–Computer Forensics: Case Examples
- B12–IT Asset & Information Security – The Basics
- B13–Investments – The Limits of Imagination

1:30–3:00 pm General Session
- B14–Deep Sea Phishing: Get Ready – Online Credit Card and Identity Theft are Going to the Next Level

3:30–5:00 pm Breakout Sessions
- B15–L&H Actuarial Review
- B16–Risk Assessment Case Study on Underwriting Cycle
- B17–Information Security – Training & Certification Overview
- B18–Injured Worker Business – What Risks to Be Aware Of
- B19–Interviewing for Risk Surveillance

TUESDAY, JULY 31
7:15–8:15 am Breakfast Roundtables:
- C1–Accreditation Update
- C2–21st Century Risk Surveillance Documentation Q&A
- C3–Computer Forensics: Theory & Potential...is it Science or Art?
- C4–ACL for Beginners

8:30–10:00 am Breakout Sessions:
- C5–Financial Restructuring Tools for Troubled Insurers
- C6–Casualty Actuarial Task Force’s Suggestions
- C7–Web App Hacking 101: Is Your Website an Open Door for Hackers?
- C8–Understanding the P&C Business
- C9–Introduction to Regulating of Solvency for Beginning Examiners – Financial Regulatory System

10:30–12:00 pm
- C10–Commissioners Panel–Hot Issues Facing Insurance
- C11–Integrating the IT Review on Risk Surveillance
- C12–XBRL Statutory Taxonomy for the Beginning Financial Pages

1:30–3:00 pm General Session
- C14–Fraud

3:30–5:00 pm
- C15–The Role of the CPA for Insurers
- C16–The Supervisory Plan – Communication of Examination Results
- C17–180/360 Degree ISQ (A View You Should Consider)
- C18–Corporate Governance – Exhibit M
- C19–Assessing Risk

WEDNESDAY, AUGUST 1
7:15–8:15 am Breakfast Roundtables:
- D1–Considerations of Companies in Runoff, Receivership and Guaranty Funds
- D2–TBD
- D3–Computer Forensics: Hardware & Software tools/Show & Tell
- D4–Investment Basics

8:30–10:00 am Breakout Sessions:
- D5–REO Proposal – New Federal Bill on Non-Admitted Surplus Line Carriers
- D6–Lessons Learned – Risk Assessment
- D7–Exhibit C in a Risk Surveillance World
- D8–Understanding the L&H Business

10:30–12:00 pm
- D9–Derivatives – Basic Concepts
- D10–Risk Assessment – How It Developed and What to Do Now
- D11–Information InSecurity
- D12–Mutual Insurers – The Challenges They Face
- D13–Teammate Training

Tear out when complete.

Qualifies as IT continuing education for the AES Designation.
– Basic Track for examiners.
SOFE Members Becoming Washington Insiders...

Make plans to join us after the CDS for an exciting, activity packed, insider’s look to Washington D.C. The Post Conference Activity needs you! We will begin the celebration campaign on Wednesday evening, August 1, as we set sail on the Historic Potomac River with a cruise that will include a fabulous all-you-can-eat dinner, live music, dancing, and sight-seeing. You are encouraged to participate in this event even if you will be flying out on Thursday. We will take all ages for this spectacular fun-filled evening.

On Thursday, August 2 and Friday, August 3, be prepared to get an insider’s view into the Nation’s Capital. Take the “Executive” tour that may include a White House visit based upon security clearance. If your party affiliation precludes you from enjoying this tour, a “Legislative” tour may be your cup of tea with a behind-the-scenes look into the Capital Building if we are able to lobby our way in with proper sign-up and security clearance for this unprecedented access. The tour guides will be monitoring the polls to determine the campaign course to take, so make sure you make your voices heard on the direction you want. The museums, memorials, and monuments are all on the ballots for you to choose. If you are an Independent, you may be able to convince the undecided to follow you in your campaign.

You must be registered to participate for whichever event you decide to attend. Please note that you do not need to do both events and can choose to select the Cruise and/or tours separately.

Cost:
Cost for the Post Conference Trip is $100. Price includes food, music, dancing, and scenery.
Reservation Deadline and Final Payment Due: July 2, 2007* *Reservations after that date are on a space available basis.
Please fill out the form (pg. 10) to attend this exciting event.
Cost for the D.C. tour is Free (except as noted below) with sign-up.

Food & Transportation:
Food is on your own. (Eat what you want when you want. What could be better?)

Transportation is on your own. The majority of time will be using your feet (wear comfortable shoes) with additional travel using the subway (minimal cost each day).

Accommodations:
Accommodations should be made quickly as the room blocks are filling up fast at the negotiated SOFE rates. Don’t wait to reserve the rooms!
Please fill out the “Tour” form (pg. 10) to accompany our knowledgeable tour guides. You may be contacted to provide additional information for possible security clearance if the White House and Capital Building access is granted.

(Continued on next page)
SOFE Group
Washington, DC
August 1–3, 2007
*Complete this form by July 2 and fax it to SOFE (407) 682-3175.

Sample Tour Guide on the ballot:
8:00am Meet in the hotel lobby (Eat breakfast before arriving)
8:15am Take subway to first stop (follow your leader)
8:30am Arrive at White House (Day 2 may involve arriving at Capital Building)
8:45am Go through metal detectors and watch fellow participants get searched
9:00am Tour White House (Day 2 may be Capital Building)
11:00am Walk to White House Visitor Center to purchase gifts
12:00pm Lunch with group or pick your own favorite spot
1:00pm Walk to the Smithsonian Museum and select favorite to tour
1:00pm (Day 2 may include Monuments and Memorials)
5:30pm Take subway back to hotel.
6:30pm Dinner as a group or select your own favorite spot.

Sign-up Form Potomac CRUISE:
Name: ____________________________________________________________________________________________________
Name: ____________________________________________________________________________________________________
Name: ____________________________________________________________________________________________________
Name: ____________________________________________________________________________________________________
Home Address: ______________________________________________________________________________________________
Home Phone #: ____________________________ Email Address: _____________________________________________________
Cost $100 x _____ = $ _____________ Checks, money orders & all major credit cards are accepted. Make all checks payable to SOFE.
For credit card payments, please complete the credit information below or call (800) 787-7633.
Name on Credit Card: __________________________________________________________________________________________
Credit Card #: ____________________________________________ Expiration Date: __________
Billing Address: ________________________________________________________________________________________________
Phone Number: ____________________________________________ Amount to Charge: $ ____________

Sign-up Form D.C. TOUR:
Name: ____________________________________________________________________________________________________
Name: ____________________________________________________________________________________________________
Name: ____________________________________________________________________________________________________
Name: ____________________________________________________________________________________________________
Home Address: ______________________________________________________________________________________________
Home Phone #: ____________________________ Email Address: _____________________________________________________
Cost Free x _____ = FREE!

Tear out when complete.
Future Sites:

**August 3 - 6, 2008, Nashville, TN**
Nashville Renaissance

**July 24 - 29, 2009, Sacramento, CA**
Hyatt Regency Sacramento and Convention Center

**August 1 - 4, 2010, Providence, RI**
The Westin Providence
The California State Chapter of SOFE is proud to sponsor the printing of the CDS Program.