



Member to Member

Creating Business through Relationships

Participating Members

**Please click on the company and classification below that you would like more information on. You will be taken directly to their company biography.*

Classification	Company	Member Contact
Appreciation Marketing	Send Out Cards	Lilly Felder
Architect	Clifford M. Scholz Architects, Inc.	Cliff Scholz & Larry Hale
Insurance	Chancellor Insurance, LLC	David Meadows
Tile & Grout Cleaning	Traynor Tile Bright	John Traynor
Training/Consulting/Education	Accents Away	Marcia Hoodwin, M.A.
Travel Agency	Adventure Travel of Sarasota	Ed Rudd
Wealth Management	Plancorp, Inc.	Joseph M. Patane, JD, LLM, CFP®, AIF®





Member to Member

Creating Business through Relationships

Send Out Cards

Appreciation Marketing

Lilly Felder, Distributor

Lfelder530@verizon.net

(941) 400-0046

7287 Villa D Este, Sarasota, FL 34238

www.socreview.com/lilly

Company Biography

System for sending a printed greeting card with a personal message from the convenience of your computer. Time-saving, cost-effective and convenient. Type in your personal message, we print it, stuff it and mail it for less than store-bought card.

Ideal Client

An Ideal Client for me is someone who would like to send cards to show appreciation to their customers and potential customers. We can set up a campaign that will provide you with the convenience of sending a card in less than 60 seconds.





Member to Member

Creating Business through Relationships

Clifford M. Scholz Architects, Inc. (CMSA Inc.)

Architect

Cliff Scholz & Larry Hale

cscholz@csma1.com & lhale@csma1.com

(941) 923-2400

7013 South Tamiami Trail, Sarasota, FL 34231

www.cmsa1.com

Company Biography

Founded in 1992, CMSA has been making a mark in many premiere communities throughout Florida with custom designed residences, elegant renovations, golf course developments, and commercial properties. Tapping into the talent of our highly qualified architects and designers, the firm has grown into a recognized and respected organization throughout southwest Florida.

Specializing in new construction, renovations of custom residences, waterfront properties, golf and country clubs, offices and various commercial properties, gives CMSA a broad range of experience. Combining the tradition of classical architecture with the fundamentals of good design sets CMSA apart from all others.

CMSA has a staff of experienced architects, draftspersons/CAD operators, researchers, specification writers, detail specialists and administrative personnel. Each member of the team works together to ensure the quality of design, including the integrity of the budget and the time schedule for completion of work. Working in tandem with the client, the professionals at CMSA create designs with elegance and enduring quality.

Ideal Client

Any client requiring a custom designed residence, a renovated residence, a waterfront property, a golf and/or country club, office, or any commercial property, would be our ideal client.





Member to Member

Creating Business through Relationships

Chancellor Insurance, LLC Insurance

David Meadows

davidmeadows@chancellorinsurance.net

(941) 923-3651

2268 Gulfgate Drive, Sarasota, FL 34231

www.southwestgreens.net

Company Biography

Active in the insurance business in Sarasota since 1978 primarily selling Property & Casualty lines of insurance. My office is located in the business district of Gulf Gate Village. We sell all lines of insurance including Home, auto, flood on the personal side and Workers Comp, General Liability, business property, business vehicles on the commercial side.

I obtained the professional designation CPCU in 1973 to help recognize and manage risk in the insurance marketplace.

Ideal Client

My clients are anywhere in the State of Florida who are looking for quality coverage and advice. We strive to provide companies to fulfill that need. Our motto is "Small enough to know you... Big enough to know you."





Member to Member

Creating Business through Relationships

Traynor Tile Bright

Tile & Grout Cleaning

John Traynor

jptray@hotmail.com

(941) 552-8940

4210 Breezeway Boulevard, Suite 417, Sarasota, FL 34238

www.traynortilebright.com

Company Biography

We clean tile and grout, and can change the color of your grout. If you are selling your home, it is an ideal time to brighten your showers and floor tile for prospective buyers..

Ideal Client

Anyone who prefers a warm and clean home.



4409 Tournament Players Club Drive Sarasota, FL 34238 • (941) 922-2800 • www.tpcprestancia.com





Member to Member

Creating Business through Relationships

Accents Away

Training/Consulting/Education

Marcia Hoodwin, M.A.

Certified Speech-Language Pathologist

marcia@accentsaway.com

(941) 921-9533

www.accentsaway.com

Company Biography

ACCENTS AWAY promotes effective communication skills, while maintaining your employees' individuality, in today's culturally diverse work environment. The classes are available in individual or small group settings and are held onsite for your employees' convenience. The programs include a comprehensive training manual with corresponding compact discs. Individualized pre/post testing is conducted to document progress. The courses usually range from seven to thirteen weeks, but can also be conducted as an intensive weekend course, with telephone follow-up. The focus, of the program, is to increase an employee's intelligibility, not to totally eliminate an accent.

Accents Away also treats and evaluates children who have speech-language disorders, such as articulation, language (including social language difficulties), voice and stuttering disorders. A child needs good communication skills to do well at school, for socialization with other children, and to prepare for a successful future. A certified speech-language pathologist will evaluate your child's communication strengths and weaknesses, and will design a program to fit your child's individual needs. Parents and/or teachers will be consulted on an ongoing basis, and will be involved in the therapeutic process.

Marcia Hoodwin, the trainer, holds a Master's Degree in Speech-Language Pathology and has received specialized training in accent modification. She has been a nationally certified Speech-Language Pathologist since 1983. She is also a member of the American-Speech-Language-Hearing-Association.

Ideal Client

An ideal client is anyone with a verbal communication difficulty.





Member to Member

Creating Business through Relationships

Adventure Travel of Sarasota

Travel Agency

Ed Rudd

ed@travel941.com

(941) 921-7707

1614 Caribbean Drive, Sarasota, FL 34231

www.travel941.com

Company Biography

Adventure Travel is a “traditional” travel agency offering “non-traditional” services. We embrace the internet as a resource and a validation that we offer the best pricing while not sacrificing personal attention and face to face travel planning.

The company and its predecessor Select Sport Travel have been in business for 25 years. What sets us apart is that we have traveled to more than 75 countries to experience what we sell. “Selling 101” tells us to “know the territory.” We do that, first hand.

We do business travel as well. We are cost effective doing short business trips including air, car and hotel reservations. For international travel, we challenge the internet to beat our prices and our service. Business class tickets at 50% discount are very common. We know the territory.

Ideal Client

Our ideal client is someone who wants to make a vacation an experience of a “lifetime”. This could be a two day getaway to the sponge docks in Tarpon Springs, a weekend of golf at Doral or Disney, or an around the world cruise. It is not the size or the cost of a vacation that makes a client ideal. It is the desire to have a perfect vacation with a seamless integration of all the parts.

Our ideal business client is one who wants to be where he or she wants to be at the “right” price, in the “right” hotel with the “right” car and on time. He or she wants the confidence that a professional has planned the trip and has the expertise to work around availability and cost issues and has the knowledge to check all the possibilities rather than relying on a couple of boiler plate web sites.





Member to Member

Creating Business through Relationships

Plancorp, Inc. Wealth Management

Joseph M. Patane, JD, LLM, CFP®, AIF®

joe@plancorp.com

(941) 330-5150

5134 Station Way, Sarasota, FL 34233

www.plancorp.com

Company Biography

Plancorp is a fee only wealth management firm that manages approximately \$1 Billion in assets that has been in business since 1983. We spend a lot of time working with clients on their planning needs. Further, we use an academic, passive, diversified investment strategy incorporating Modern Portfolio Theory for all of our client assets, minimizing costs and taxes in the process. We receive no commission income from the sale or recommendation of any financial product or service. We pay no one for any referrals that we receive, nor do we accept money for any referrals that we make. We are only paid directly from our clients which insures the total independence and complete objectivity of all of our recommendations. We are purposely structured to have no conflicts. Our fiduciary responsibilities to do what is "best" for clients are also very important. Since we are "fee only", we can put the best interests of our clients first without them worrying whether they are getting hit with extra/unnecessary fees. Further, our team includes lawyers, CPAs, CFPs (Certified Financial Planner) and AIFs (Accredited Investment Fiduciary). We are certified by CEFEX (www.cefex.org) as a Fiduciary. (CEFEX is an ISO type independent global assessment and certification organization). We are one of the few financial advisory firms so certified.

Our planning includes:

- Financial independence analysis
- Retirement planning
- Cash flow analysis
- Income tax planning
- Education funding analysis
- Estate planning coordination
- Insurance needs and policy analysis
- Business and retirement plan issues
- Employee benefits analysis and coordination

Ideal Client

Active physician/professional/entrepreneur (including family members) with significant wealth who does not have the time or expertise to manage his/her wealth and financial planning for the long-term, and who has not yet devoted time to planning for his/her future.

Household Income: \$150,000 +

Investable assets and household net worth: \$1,000,000 +

