

Invitation

February 8, 2010

Steve Schulmerich
Schulmerich & Associates
10260 SW. Greenburg Road
Suite 400
Portland, OR 97223

Dear Steve:

As being among a select core of the best independent advisors in America, I am writing to invite you to the second annual *Barron's Winner's Circle Top Independent Advisor Summit*, from the evening of April 14 until mid day on April 16 at The Ritz Carlton Grande Lakes, Orlando FL. This unique event will recognize your achievements and will bring together the nations top 500 independent advisors to share industry knowledge and best practices. This is an invitation-only event. Invitations are non-transferable.

Our agenda promises to generate provocative and in-depth, peer-based discussions examining the most highly sophisticated approaches to managing practices, investments and clients. Sessions will cover topics ranging from asset allocation and investment themes to team structure, client communications and other issues facing top independent advisors. The goal of the conference is for attendees to walk away with practical, actionable ideas for maintaining a successful practice in these challenging times.

For more details on the conference and to register, please go to www.barrons.com/tias. We have set aside a limited number of rooms at The Ritz Carlton Grande Lakes, Orlando and you can reserve your room for the conference at this website as well. If you have any questions or problems with conference registration or room reservations, please contact Dorothy Gelormino at 212.597.5947.

I urge you to register now to join us for this unique event. Once again, congratulations on being recognized as one of America's elite independent advisors. We look forward to seeing you in Orlando!

Sincerely,



Ed Finn
Editor and President, *Barron's*