



# Chapter News and Events



January 2009

[www.gscpa.org](http://www.gscpa.org)

## President's Message

Happy New Year! Hopefully, 2009 will be a prosperous year for all.

Our next meeting will be on Tuesday, January 20, 2009 at the Georgian Terrace Hotel. Information about the Georgian Terrace Hotel (including directions and maps) can be found on their [web site](#). Note that the cost of the meeting is \$25 which includes complimentary self parking. For the January meeting Sandra Morelli of Bernstein Global Wealth Management will present "Capital Markets Update". I encourage you to invite some friends to attend.

This will be the third joint meeting of the Atlanta and Buckhead Chapters. Both chapters have been pleased with the turnout for the previous two meetings. Many thanks to all who helped. As discussed previously, the GSCPA at the state level is evaluating chapters that may benefit by combining their resources and leadership talent.

The GSCPA Fall Council meeting was held recently. There were several topics discussed including the feasibility and value of an affinity program, the possible combination of the Spring Council Meeting with the Annual Convention (and if so, how should the budget be handled since the budget is passed at the Spring Council Meeting but the Annual Convention begins after the start of the new fiscal year), whether the GSCPA should establish a Political Action Committee (PAC) and whether the GSCPA should create a membership category for non-CPAs similar to the associate membership that is available to CPA firm staff members.

If you have any comments or suggestions regarding these items, please contact me and I will pass them on to the Board of Directors of the GSCPA.

I am pleased to announce that we have forty new members who have recently joined the Atlanta Chapter. We are excited about the growth as we continue to focus on serving our members in a variety of ways.

As always, we invite you to give us feedback on how we are doing. We are also interested in mentoring additional leaders who would like to join our management team. We'll be happy to help you find a position to best achieve your goals.

Regards,

Michael Broughton  
Atlanta Chapter President

## Chapter Meeting Information

**Date:** January 20, 2009

**Location:** The Georgian Terrace Hotel, 659 Peachtree Street NE, Atlanta, Georgia

## GSCPA Resources

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## GSCPA Upcoming Courses

[01003 - Preparing Corporate Tax Returns](#)

[01004 - Preparing Individual Tax Returns](#)

[02001 - FASB Review for Industry](#)

30308

**Time:** 12 p.m. (please arrive 20+ minutes early for registration)

**Cost:** \$25 cash or check (includes lunch and 1 hour of CPE credit)

**Speaker:** Sandra Morelli, Bernstein Global Wealth Management

**Topic:** Capital Markets Update

GSCPA Atlanta Chapter meetings are open to professionals with interest in the topic being discussed. The meetings also happen to be great opportunities to meet other professionals. If you know of someone who would benefit by attending this month's meeting, please forward this invitation to them with a request to RSVP.

Please forward your reservations/cancellations via email ASAP to: [Chet Hosch](#), Atlanta Chapter Secretary.

Complimentary self-parking is available at The Georgian Terrace garage for those attending the chapter meeting.

## Speaker's Biography

**Sandra S. Morelli**

**Senior Portfolio Manager**

Ms. Morelli is the Senior Portfolio Manager (SPM) in the Atlanta office of Bernstein Global Wealth Management. As a member of the firm's Private Client Investment Policy Group, she participates in the strategic oversight and management of private client accounts in the Southeast. As well, she serves as the primary national liaison between Bernstein's Alternative Investments team and the firm's Private Client business, participating in the development of strategic allocation advice and communication of the firm's hedge fund strategies to clients and Bernstein professionals.

Prior to joining Bernstein's Los Angeles office as an SPM in 2000, Ms. Morelli had worked in the investment industry for 19 years, most recently as a Principal and Senior Consultant in the Atlanta office of William M. Mercer Investment Consulting, Inc. In that role, she advised large foundation/endowment and other institutional clients in the Southeast regarding portfolio structure, manager selection and risk management. She served as a member of the firm's global Manager Search Committee overseeing research efforts for Mercer's investment manager universe. Before joining Mercer in 1989, she held consulting positions with the investment divisions of TIAA-CREF and Equitable Life Assurance Society, and served as a trust officer at First National Bank of South Carolina.

She earned a BA degree from Converse College and a MS in organic chemistry from the University of South Carolina.

Ms. Morelli serves as a frequent speaker at conferences and seminars sponsored by both Bernstein and outside professional/trade organizations. She presently serves as a member of the Investment Committee of the Mercy Investment Program and previously served in a similar capacity for the Orange County (CA) Community Foundation. She is an active member of the Board of Trustees of Consumer Credit Counseling Services of Greater Atlanta (CCCS).

## 2009 Meeting Schedule

February 17, 2009 - Chet Hosch - Choice of Entity

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