

NEWPORT BEACH SUNRISE ROTARY CLUB

Reflections at Sunrise

President Reniero Francisco	Fellowship Tammy McKennon	Community Svc. Gordon Bagne
Secretary Donna Cody	Membership Thomas Giulioni	Internat'l Fndn. Richard Hanki
Treasurer Joseph Bailey	Programs Cynthia Cowell	International Svc. Sylvia Michler
Club Adm. Jerry Baronne	Finemaster Jerry Barrone	Public Relations Laura Dietz
Bulletin Caroline Babott	Sgt.at Arms Bill Robbins	Arch'vs/Web Site Dan Korpman

President-Elect Cynthia Cowell called the meeting to order at 7:30 AM on April 5, 2011. Willis Longyear gave the invocation, Clare Taber led the pledge, and John Gregg led us in song.



Gil Thweatt and Dickson Shafer

Reniero's Fifty Things to do before he Dies

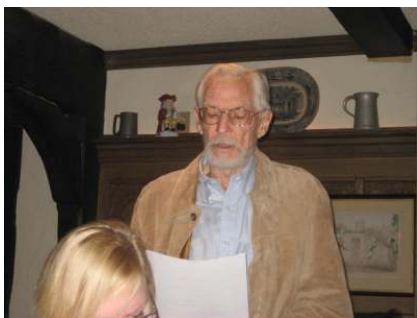
No. 40 Set up a Foundation.

Assignments

April 26 May 3

Greeter	Robbins	TBD
Invocation	Cockley	Bagne
Pledge	Cody	Birch
Song	Kennedy	Cowell

Cooling 's Humor



Dick Cooling with some humor.

Rotary Calendar

Apr 26 Craft Talks – **NOTE: We will be meeting back in the dining room.**

- Apr 29 District Conference, Hilton Inn, Irvine
- May 3 Bob Meyer, Fly in and Walk Back
- May 10 Cynthia Martinez from Words of Comfort, Hope and Promise
- May 17 **Off-site Meeting** at the Sea Base Bldg, Shana Aguirre
- May 18 Board Meeting, 7:30 am at Coco's, CDM
- May 21 Rotary International Convention, New Orleans, LA
- May 22 Wine Tasting – location TBD
- May 24 Gordon Duffy, Duffy Fitness Institute
- May 31 Lane Calvert and Rae Shirer, "Fifth Avenue of Service"
- June 7 TBD
- June 14 Club Assembly and Governor's Transition Party, Doubletree Hotel, Anaheim
- June 15 Board Meeting, 7:30 am at Coco's, CDM
- June 21 TBD
- June 28 **No Meeting** - Demotion Party for Reniero Francisco @ Five Crowns

Prospective Members

Steve Bender, sponsored by Tom Giulioni. **Ryan T. Gowin**, relocated Rotarian, formerly a member of Tacoma 8. **Anh Tran**, Modern Wealth Advisors. Mr. Gowin and Ms Tran sponsored by President Reniero Francisco. Please send any comments to President Reniero Francisco

Visiting Rotarians and Guests

Arnetta Robinson, Guest
Asst Dist Gov Dan Graham

Hunter Cook, Newport Balboa
Bill Hossfeld, Newport Balboa
Cartwright Sheppard, Culver City

District Conference

Willis Longyear is in charge of our Club Ice Cream Shoppe at Hospitality Night at the District Conference, which is being held at the Hilton-Irvine, Orange County Airport, Irvine, 18800 McArthur Blvd. You must register, which you can do on line. Willis passed around a sign up sheet. There will be a Saturday breakfast, lunch and Casino night that evening followed by a Jazz brunch on Sunday morning.

Live Auction

Rich Hanki obtained two pair of Oakley sunglasses that did not make it into our fund-raiser but were auctioned off this morning. The Angel red and white glasses went for \$100 to Cynthia Cowell.



Cynthia Cowell modeling her glasses

The "James Bond" glasses, modeled by Jeff Heilesen went to Gordon Bagne for \$100. Congratulations.



Our model Jeff Heileson

[RYLA and Scholarships](#)

Phil Reynolds announced that our Club will be sending 4 students to RYLA on May 13th and he needs drivers transport the students. If you can help, please contact Phil. All of the students will attend a breakfast so members will get to meet them.

[Easter and the 1/1 Marines](#)

Laura Dietz received a supply of Easter baskets for the 1/1 Easter Egg Hunt on April 24th at Camp Pendleton and thanked everyone.



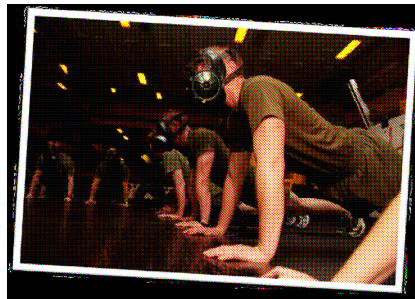
Laura Dietz

[1/1 Marine Car Wash](#)

The marines will be holding a car wash on Saturday, April 30th, to raise funds for their Marine Ball on November 3rd. The car wash will be at Westcliff at Dover Drive (behind Union Bank). Plan on joining Laura afterwards at The Arches to support our super Marine, Dan Marcheano.



Marines exercising on deck and in the ship



These photos provided by Rick Anderson, 1/1 Family Readiness Officer

[Fines and Happy Dollars](#)

Jerry Barrone announced that President Reniero Francisco was a secret greeter and Virgil Galey paid \$1 for not shaking his hand. Virgil also advised that he received a Paul Harris Fellowship on Thursday delivered to his home. Willis and Judith Longyear celebrated their 50th wedding anniversary on April 8th so he paid \$50. John Clark's granddaughter, a graduate of Back Bay High School, had received a Rotary scholarship, and is now graduating from college. Price Shapiro announced that he recently spoke with Christina Holliday. Christina advised that her son Matt had 2 more treatments to go and doing well. He donated \$20 to the Marine's Easter party. Cynthia Cowell proudly announced that her

husband Jeff has, after a long search, gotten a job.

[Craft Talk – Dan Korpman](#)

Gil Thweatt introduced Dan Korpman. Dan was born in Baldwin, Maryland son of a Civil engineer and an interior designer. He has one older brother who lives in Virginia. Growing up he was very active in sports and developed a love for soccer and skiing. He attended Loyola Blakefield where he learned the value of structure, goal setting and service to others. He learned to be "Brother for others." Dan attended Virginia Tech University and became a member of Sigma Phi Epsilon fraternity. Ut Prosim - that I may serve is the Virginia Tech motto. He selected the school because of their commitment to service. He was elected president of his Fraternity as a sophomore and created a recovery plan with his cabinet. He also became very involved with his alumni during the incorporation of their board.

This experience helped Dan gain an understanding of the entrepreneurial spirit, mentorship and using a role of significance to make a positive impact on others lives. In 2005 Dan lived in Australia and traveled with peers from all over the globe. Through his travels he found an inner confidence and an appreciation for others' differences and cultural backgrounds. Dan started his career in Los Angeles with the General Electric Company and worked as a junior executive in their consumer finance division. He accepted a position with UBS Wealth Management two years later but the program did not start for almost a year. During that seven-month period Dan lived his dream and worked as a broker for a real estate development company in Vail Colorado. He draws from the experience and peacefulness of living in the mountains every day. Dan moved to Newport Beach

with UBS and began working with the three of the largest wealth management groups in California. He introduced and developed financial planning processes for the groups while leveraging their experience and guidance to develop his own business and investment models. He used this experience to develop an understanding of how the best teams run their practices and deliver for their clients. Dan accepted a partnership in July of 2010 to become the youngest partner at UBS Newport Beach. He and his partner established the Trevisan Korpman Wealth Management Group. Their mission is to provide unparalleled hi-touch service and comprehensive financial organization so that their clients know exactly where they stand financially. They work as a concierge organizing individual's, families' and small institutions' financial lives: handling retirement, investments, liabilities, corporate benefits, insurance, closely held businesses, education funding and estate planning. Rather than getting piecemeal recommendations or product offerings they tailor comprehensive financial plans built upon each client's unique long-term objectives. Throughout the years they monitor and adjust the plans along the way. Their clients look at them as the "go to" person in all financial matters. Dan has decided to set up his roots in Newport Beach. His goal is to establish himself as a man of integrity within the community and to build the most trusted wealth management practice in Southern California. He would like to start a family in the area as well and have two children. Dan enjoys soccer, skiing, surfing, sailing, off-road racing, golf, cooking, craft beer tasting, wine tasting, lawn bowling and college football. He serves as the President of the Board of Directors for Literacy in Vision

and serves as an advisor for the Literacy Project Foundation.

Craft Talk – James Valle

Gil Thweatt next introduced James Valle CPA, founder of James Valle and Company, CPAs has over 30 years of senior executive experience in both publically traded and privately held companies. His broad industry expertise serves to create wealth for his clients by leveraging strategy and operations consulting with tax, accounting, and financial planning. The combined resources of his firm enables James Valle & Company, CPA's to assist their clients in increasing profitability and maximizing individual wealth. Jim has senior executive level experience in telecommunications, energy, Internet Service, aerospace and other service industries. Mr. Valle led telecommunication, energy and "Smart Grid" engagements in Europe, the USA, the Middle East, Africa and Asia for governments, utilities, telecoms, and entrepreneurial entities. James has owned many businesses including a subsea-based telecoms infrastructure company, a McDonalds restaurant, CPA firm, a biotech company, a critical infrastructure (energy/telecoms) systems integration company, a drinking water purification company and several consumer product oriented companies. He has served as an Adjunct Professor at the Graduate School of Management at Pepperdine University. James Valle is a KPMG trained, California Certified Public Accountant. He holds an undergraduate degree in Business Administration from the University of San Diego, attended USC towards his Masters in Taxation, and earned an MBA from the University of California at Los Angeles. He also graduated number one in his class at the American Council on Education

accredited, Hamburger University while preparing for ownership of a McDonalds franchise (Funny but true!!) Jim has four children, all boys, ages eight to twenty-three. He is one of six siblings.

Club Website

www.newportbeachsunriserotary.org

2009-2010 District 5320

District Governor: Johrita Solari
District 5320 Office:

Jim deBoom PDG

District Website: www.rotary5320.org

Need a Make-up? Try:

Newport Irvine Rotary Club on Thursdays at 12 noon at the University Club on the UCI Campus.

Newport Balboa Rotary Club on Wednesdays at the Bahia Corinthian Yacht Club, 1601 Bayside Dr., Newport Beach at 6:15 PM.

Laguna Beach Rotary Club on Fridays at 12:15 at Aliso Creek Inn, 31103 Pacific Coast Hwy, Laguna Beach, CA.

Costa Mesa Rotary Club on Wednesdays at 12:15 at the Ramada Inn and Suites, 1680 Superior Avenue, Costa Mesa.

Privacy

Any Club members desiring not to have their picture published in the newsletter should notify Caroline B. Babott, newsletter editor.



John Goodlad and Caroline Babott