



# CPA ♦ LAW SOCIETY

## OF SANTA BARBARA COUNTY



**The Forster Group  
at Smith Barney**



***“Protecting Victims of Identity Theft”***  
**FEATURING**  
**Tom Fragala**  
*Founder and CEO of Truston*  
 &  
**Sharon Kennedy**  
*Sharon Kennedy Estate Management*  
**Thursday, March 29, 2007**  
**12:00 - 1:30 PM**  
**La Cumbre Country Club**

### ***Presentation***

**Tom** will discuss 5 effective tools for victims and potential victims of ID theft, with a special focus for CPAs and attorneys.  
**Sharon** will present tips for determining potential elder and dependent adult abuse. She will cover many of the financial scams that target elders.

### ***Tom Fragala***

*Founder and CEO of Truston*

Tom Fragala started Truston in 2004, after being the victim of identity theft. Today Truston employs a team of experts ranging from former police officers and certified fraud examiners to former credit bureau investigators and credit report/score experts who work together to provide easy and effective tools for victims and potential victims of ID theft.

### ***Sharon Kennedy***

*Sharon Kennedy Estate Management*

Sharon has been an attorney for the past 18 years and she serves as a professional fiduciary for her clients. Many of Sharon’s clients suffer from various forms of dementia disorders including Alzheimer’s Disease, and she provides assistance with their estate management. Sharon currently serves as secretary for the board of directors of the Alzheimer’s Association. She is also an instructor with the adult education program at Santa Barbara City College.

### ***Identity Theft***

Identity theft is a crime in which an imposter obtains key pieces of information such as Social Security and driver's license numbers and uses it for their own personal gain. The threat of identity theft has exploded in recent years as we’ve moved from a face-to-face, cash-based society to an online, anonymous, credit-based society.

### ***Reservations***

The cost of the luncheon is \$35 for non-members and \$25 for members.  
 Please email your reservations and lunch selection to [cpalawsb@bpw.com](mailto:cpalawsb@bpw.com).  
**RSVP by Thursday, March 22**  
 Please make checks payable to CPA/Law Society and remit upon luncheon reservation.  
 Payments can be mailed to:  
**Tina Benavides; PO Box 90860; Santa Barbara, CA 93190**

### ***Lunch Choices***

#### **Cobb Salad**

Finely chopped Romaine and Chicory lettuce with freshly cooked chicken pieces, tomatoes, eggs, avocado, and bacon; topped with crumbled bleu cheese. Served with zesty red wine vinegar and oil dressing.

#### **Chicken Marsala**

Sautéed breast of chicken with mushroom and marsala sauce, served with mashed potatoes and the vegetable of the day.

#### **Vegetarian Pasta**

Angel hair pasta with sun dried tomatoes, fresh vegetables tossed in a light olive oil and fresh basil.  
*Lunch includes your choice of iced tea, coffee and dessert.*

### ***Continuing Education***

#### **CPA/Attorneys: 1.0 Hr CPE/MCLE**

This activity has been approved for Minimum Continuing Legal Credit by the State Bar in the amount of 1.0 hour. VCBA certifies that this activity conforms to the standards for approved education activities prescribed by the rules and regulations of the state bar of California governing MCLE. Additionally, this organization follows the CE requirements, specified in the California Board of Accountancy Regulations.