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CENTER FOR CFB FAMILY BUSINESS

FAMILY EQUITY

A Publication of The Center for Family Business at the University of New Haven

In a family-owned business **family equity** is value measured by trust, communication, shared vision and planning among family members.

FIND YOUR VOICE:

Communicate Like a Pro and Measure Your Effectiveness

Presented by **Donna Palomba** & **Steve Harris**, **WORX Group**

Wednesday, June 3
5:30 to 9:00 PM
Oak Lane Country Club
Woodbridge, CT

Thursday, June 4
8:00 to 11:30 AM
Bigelow Tea
Fairfield, CT

Marketing is an essential component in ensuring the continuity of your family business and it is ever changing, with the emergence of social networking, blogs, shrinking media costs and reduced print readership. It simply isn't sufficient to create a logo, choose a stock photo and write a witty headline.
With more communications vehicles, more clutter and more chatter, target audiences are becoming highly distracted and increasingly segmented.

In order to achieve maximum results, your message must distinguish your company and product and reach your target audience. Now more than ever, it is essential to craft your unique voice, communicate with conviction and better measure your marketing. In this hands-on seminar we will start with the basics of branding, learn about reaching the modern consumer and how to best measure your marketing dollar's effectiveness.

For more information or to register to attend, please call 203-932-7421 or visit www.newhaven.edu/cfb.

Donna Palomba

Steve Harris

MEMBER NEWS

Shelly Stokes Joins Hord Foundation Board

Shelly A. Stokes, general counsel of Newtown-based TR Paul Inc., has joined the board of The Hord Foundation, Inc., of Danbury. Attorney Stokes, a 1998 graduate of George Washington University Law Center, has been employed with TR Paul Inc., since 2002, and heads TR Paul's individual insurance products division.

Ms. Stokes is replacing Paul Lux, Esq., who has served on The Hord Foundation's board for many years as legal counsel. The Hord Foundation, established in January 1993 by Noel and Cora E. Hord, is a nonprofit organization dedicated to providing financial and development assistance to African American students so they may have the opportunity to further their education.

Shelly A. Stokes, General Counsel
TR Paul Inc.

William L. Dunbar, Sr.
Copes Rubbish Removal

William L. Dunbar, Sr. Receives Two Awards

Contributed by Tracey Goetsch

William L. Dunbar Sr., owner and president of Copes Rubbish Removal received two prestigious awards from town organizations in April and May.

On April 27 he was presented with a special award from the Water-Oak Gold Circle of Sports, which honors "a one-time Watertown/Oakville resident dedicated to the highest ideals of sportsmanship and who has contributed to the betterment of sports, regardless of race, color or creed."

On May 6th, he was honored with the Alexander L. Alves Award. This award has been given for the past 15 years in memory of Alexander L. Alves, a Rotarian, community activist and volunteer. It is presented to a "person who embodies the qualities of outstanding achievement, volunteerism, and service, and who has made significant contributions in the area of charitable, political, or community service."

DiMatteo Insurance Honors Three Employees for 20 Years of Service

by Cara Mocarski

Loretta Lesko, John DiMatteo, Marie Agin
DiMatteo Insurance Service Center

In these challenging economic times when large companies are experiencing massive layoffs, it's important to remember that some small family businesses are thriving. DiMatteo Insurance Service Center Inc., with offices in Shelton and Bethany, is one of those companies who have experienced tremendous growth since the second generation began managing the company over 16 years ago.This mid-size insurance, financial and employee benefits firm became successful by retaining several key staff over the years. Recently, the following three employees were presented with 20-yr. service awards: John DiMatteo of Bethany, President; Shelton residents Loretta Lesko, Vice President; and Marie Agin, Commercial Account Tech.

"I was delighted to receive this award," said President John DiMatteo. "This recognition is a testament to the strong work ethic my parents built this business on nearly 50 years ago. I am proud to acknowledge my sister, Loretta Lesko, and one of our first employees, Marie Agin, for their long-time loyalty to our insurance business. We have grown tremendously from 3 to 24 employees and this would not have been possible without their ongoing commitment and support."

John DiMatteo joined the firm over 20 years ago to help his parents, Anthony and Adeline DiMatteo, expand. Their only son, he worked his way up and became President in 1993. Today, he oversees the Financial Service Department and securities offered through Commonwealth Financial Network. Specifically, he manages retirement plans, brokerage accounts, financial planning, group health and life plans for businesses, and securities and advisory services.

A graduate of the University of Connecticut, he is active both professionally and in the community. He is a member of the Naugatuck Exchange Club, Membership Chairman of the Home Builder's Association of New Haven County, Treasurer of the Professional Insurance Agents Management Services, and Past President of the Professional Insurance Agents of Connecticut. A Certified Financial Planner, DiMatteo holds many prestigious credentials including: Property Casualty and Life/Health License, Series 6 Securities License, Series 7 Securities License and Certified College Planning Specialist.

Most recently, he became President of the DiMatteo Family Charitable Foundation, which organizes an annual golf tournament and has raised an impressive $68,000 for local charities in the past three years.

His sister, Loretta Lesko of Shelton, was the first sibling to work full-time at the agency. Over 20 years ago, Lesko joined her parents in the family business to help them install their first computer. She started out as a jack-of-all trades and did everything from writing new policies to handling customer service issues. When the business moved from Bridgeport to Trumbull in 1993, she began managing the Commercial Department, plus assisting in the Tax Department.

Currently, she serves as Vice President, Commercial Lines Marketing Manager and Tax Preparer. In the Commercial Department, she oversees a staff of eight and is responsible for the commercial packages, business auto, workers compensation, and business owners' policy.

A graduate of Sacred Heart University, she obtained both her Property and Casualty Insurance License and Certified Insurance Counselor Designation. Since 2006, she has been a committee member of the Professional Insurance Agents in Connecticut. Lesko also is a member of the Women's Group affiliated with the Center for Family Business at the University of New Haven.

"I have a strong passion for helping other people," said Lesko. "Our goal is to make sure our client's needs are met using a customized approach. I derive great personal satisfaction knowing our agency has an excellent reputation in the business community."

Marie Agin of Shelton, a Commercial Account Tech, is the longest serving employee with DiMatteo Insurance. A graduate of Herbert H. Lehman College in New York, she began working over 20 years ago as a part-time customer service representative. At the time, the company had three staff members. When the office expanded and relocated to Trumbull, she began handling personal lines accounts. She was then promoted to a Commercial Account Manager and eventually to Commercial Account Tech. Agin earned a Property Casualty License.

According to Lesko, "Marie makes everything happen seamlessly in the Commercial Department. She is our gatekeeper and follows up diligently with all our commercial policies."

Agin added, "I really like the way the DiMatteo family runs their business.They provide me with a flexible working environment and have given me the opportunity to wear many different hats. I admire and respect all of them."

DiMatteo Insurance Service Center Inc. was founded in 1960 by Anthony and Adeline DiMatteo of Shelton and has been headquartered in Shelton since 2004. For the past 16 years, their four children and two spouses have managed the business.

Other family members who are employed by the agency include: Victoria DiMatteo of West Haven, Personal Lines of Insurance; Shelton residents Rosemarie Esposito, Income Tax Service Center; and Robert Lesko, Life Sales Department; and Kim DiMatteo of Bethany, Manager of the Bethany office and the Employee Benefits Department.

"It is gratifying to see my children and their spouses so dedicated to the insurance business my wife and I started nearly 50 years ago," said founder Tony DiMatteo. "I never imagined the second generation would take the company to such a high level of success. We commend them on their many achievements."

For more information about DiMatteo Insurance Service Center, please call the Shelton office, 79 Bridgeport Avenue, at 203-924-4811; the Bethany office, 649 Amity Road; at 203-393-5900 or visit www.dimatteoinsurance.com.

Announcing

The DiMatteo Family Charitable Foundation

4th Annual Golf Tournament

Here are the details.....

DATE: Monday, July 13, 2009 Rain or Shine Shamble format

PLACE: Oronoque Country Club, 385 Oronoque Lane, Stratford, CT

Proceeds will benefit the following charities: St. Vincent's Swim Across the Sound,

American Heart Association & CT Families for Effective Autism Treatment

Golf Packages

All golf packages include lunch, golf, dinner, awards and raffle; portion of Green fees is tax deductible

Foursome: $660 **Individual:** $165

Sponsorship Packages (Space limited, first come, first served)

Gold - $1,100 (includes Foursome) or $500 (no Foursome) 4 Available

Lunch Sponsor - $250

Dinner Sponsor - $250

Cocktail Sponsor - $250

Golf Cart Sponsor - $250 (max of two)

Name: ____ **USGA Index:** ________________

Company: ____

Address: ____

City: ____________________ **State:** ____________

Zip: ______________________________

Phone: _____________________ **E-mail:** ____

I wish to become a Sponsor: • Gold • Lunch • Dinner • Cocktail • Golf Cart

RAFFLE TICKETS: 1 @ $5 * 3 @ $10 * 8 @ $20 * 25 @ $50 * 60 @ $100

**** Please include Golf, Sponsorship & Ticket price in Total Check ****

Payment enclosed: $ ___________________

I wish to play with the following golfers:

1. _________________________________ **USGA Index:** ___________________
2. _________________________________ **USGA Index:** ___________________
3. _________________________________ **USGA Index:** ___________________

Please note: Payment must be paid in full in order to register.

Check made payable to: DiMatteo Family Charitable Foundation

Mail to: DiMatteo Insurance Service Center, 79 Bridgeport Avenue, Shelton, CT 06484

***For further information, call* or *e-mail* Sharon at 203-924-5422 /**
sgolis@dimatteoinsurance.com

RIVEL RESEARCH GROUP and NASDAQ OMX Launch New Intelligence Service Designed to Help Companies Gauge Investor Sentiment Exchange Broadens Footprint in Providing Services to Public Companies

NEW YORK, Apr. 16, 2009 (GlobeNewswire via COMTEX News Network) -- The NASDAQ OMX Group, Inc. (Nasdaq:NDAQ) announced today that it is partnering with Rivel Research Group, a leading investment research group, to launch Waypoint, a product designed to give companies immediate and cumulative perception on investment community sentiment.

Waypoint was created exclusively for NASDAQ OMX and its subsidiary Shareholder.com as a new intelligence service for companies requiring deeper insight on how their company is perceived by investors. Each month, Rivel Research Group will interview a select group of key institutional investors who may have a large stake in the success of a company or who have changed their position in the company. At the end of the month, within Shareholder.com's Pinpoint Market Intelligence application, clients will receive Rivel's analysis to understand how they are viewing and valuing the company.

After six months of gathering investor feedback, Rivel will apply marketing research methodologies to analyze the data. Additionally, Rivel will compare the client's results to over 1,000 companies studied previously to provide further context for the information. Waypoint analysis provides timely feedback to communications executives and members of management on key issues that need to be addressed near term. Once aggregated, the analyses will provide action steps and guidance for long-term communications strategy.

"Rivel Research is renowned within the investor relations industry for their perceptive work. Our partnership with Rivel allows NASDAQ OMX to synchronize their Waypoint analysis directly within our intelligence services," said Doug Ventola, Senior Vice President of NASDAQ OMX. "In concert with our stock surveillance service that provides information on 'who' is changing their share position, Waypoint can help bring clarity on 'why' an investor's position is changing," he added. "It's an essential new element that our clients ask for."

"Waypoint is a very timely offering given what is happening in the global financial markets. Not only does it provide an opportunity to gather meaningful feedback from top investors in real time, but it also gives companies the ability to mold their long-term communications strategy," said Brian Rivel, President of Rivel Research Group. "The quantification of the ongoing feedback truly differentiates this deliverable from others in the industry. This enhancement is a valuable addition to the NASDAQ OMX/Shareholder.com suite of products and we look forward to working with them on this endeavor," he added.

Center Sponsors

The Center for Family Business is sponsored by the following firms, whom we thank for their support and active participation.

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Counsellors at Law

Wiggin and Dana, one of the foremost law firms in Connecticut, offers a complete range of legal services including total business and personal legal support to organizations and private firms and their principals and families. Wiggin and Dana prides itself on taking the time to understand each client's business, industry, needs and goals, thus providing intelligent, practical, and cost-effective counsel to family businesses. For more information, please contact Len Leader at 203-363-7602.

Daniel M. Smith & Associates

Daniel M. Smith & Associates has been serving clients since 1978 in the areas of personal Estate, Retirement, Special Needs and Long Term Care Planning. In the business arena, we provide the same services as above with the addition of Business Succession, 401(k) Planning and Executive Benefit Planning strategies. Our client relationships are embodied in three words...Trust, Integrity and Service. Dan Smith can be reached at 203-783-0755

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Charter Oak Insurance and Financial Services Co. (Charter Oak) serves more than 65,000 clients across the Northeast and beyond. With seven regional offices throughout New England, chances are we're right in your back yard. Our relationship with you is about much more than financial services and insurance. It's about children and parents, brothers and sisters, businesses and employees. It's listening to what you have to say and putting your interests first. It's being a part of your team and a member of your community. For more information, contact Pete Novak 413-781-6850.