

6th Annual

FICPA Educational Foundation

OCEAN REEF  
FAMILY RETREAT



hosted by:  
Region 6 Chapters  
of the FICPA  
Ocean Reef Club, Key Largo  
July 31 - August 3, 2014



Florida Institute of CPAs  
EDUCATIONAL  
FOUNDATION



#ficpaEDF

[www.ficpa.org/Retreat](http://www.ficpa.org/Retreat)



# The 6th Annual Family Retreat to Benefit the FICPA Educational Foundation at Ocean Reef Club



The FICPA Educational Foundation will host its 6th Annual Family Retreat at Ocean Reef from July 31 to August 3, 2014. Our Ocean Reef Retreat is a casual (shorts and sundresses) event with a golf tournament, cocktail parties and a moonlight beach luau. It's all designed to promote the CPA profession; increase awareness and support of the FICPA Educational Foundation; and encourage our attendees and families to get to know each other.

This festive gathering includes talks with our profession's leaders and late-night storytelling for the kids. Held in one of the most natural and beautiful settings in the United States, Ocean Reef Club in Key Largo spans 2,500 secluded, tropical acres and offers 5-star hotel accommodations. Ocean Reef also boasts a spa and fitness center; three championship golf courses; a Har-Tru tennis facility; numerous restaurants and bars; a private airport; a world-class, 150-slip marina; and a watersports island haven that includes a saltwater lagoon, kiddies' beach, children's and adult pools, beach volleyball courts and sailing activities. If you're looking for an offshore adventure, you can enjoy deep sea and flats fishing as well as diving and snorkeling.

The Educational Foundation is committed to making the Family Retreat affordable, and at \$155 per night (kids stay free in their parents' room), we believe we've succeeded!

The first five events have attracted more than 700 CPAs and their families, raised more than \$65,000 for the Foundation and helped establish a new \$35,000 endowment - the George A. Gulisano Endowment Fund - to help deserving accounting students in Florida.

This year's retreat includes a reception for the incoming 2014-15 FICPA Chair and a moonlight beach luau dinner with the 2014-15 President of the FICPA Educational Foundation and our keynote speaker.

Visit the event website at [www.ficpa.org/OceanReef](http://www.ficpa.org/OceanReef) for more information about reservations. You can also see photos and sponsors from prior retreats. To learn more about the resort, visit [www.OceanReef.com](http://www.OceanReef.com).

# Event Details

## THURSDAY, JULY 31

### 4-6 p.m. Hotel Check In:

**5:30-6:30 p.m. Chairman's Cocktail Reception** presented by George A. Gulisano and Jason Chorlins, Event Co-Chairs.

**6:30-10 p.m. Complimentary Dive-in Movie** at the Buccaneer pool with games and face painting for the kids. Bring your own food or purchase take out at the Islander restaurant. Presented by A-lign CPAs.

**8-10 p.m. A-la-carte Dinner** at The Galley Restaurant, a great place to socialize and eat wood-oven pizza and pasta, traditional steak, poultry and seafood dishes.

## FRIDAY, AUGUST 1

**8:30 a.m.-1:30 p.m. FICPA Educational Foundation Family Retreat Golf Tournament** Scramble format for golfers of all levels (entry fee \$150) that includes range, golf, prizes, breakfast and lunch.

**9-11 a.m. Eco-Kayak Tour** Take a guided tour through the water and habitat surrounding the Ocean Reef Resort. Your guide will be an Ocean Reef Naturalist. Please reserve your spot with Ocean Reef as soon as possible due to limited availability. Tours are for those 12 years or older and the cost is \$77 per person. Reservations should be made through the concierge desk.

**12-2 p.m. Lunch** We recommend the Beach Grill on Buccaneer Island, the outdoor sports bar, the kid's lagoon or just lizard lounging at the pool with piña colodas!

**4:45-6:30 p.m. CPE by the Sea** Join us at the Lagoon Beach for two complimentary hours of "A&A" CPE with a featured guest speaker. Presented by PeakCM.

**6:45-8 p.m. Fuerst Littleman Cocktail Reception** for the 2014-15 FICPA Chair, presented by the Region 6 Chapters at Buccaneer Beach/Lagoon.

**7:30-10 p.m. A-la-carte Dinner** at The Islander Restaurant, a great choice for steaks, sushi, seafood and other favorites.

**10 p.m.-1 a.m. Dancing and Fun** Go out to the Burgee Bar to continue the night!



# Event Details

## SATURDAY, AUGUST 2

**9-10:30 a.m. Bike Tour** Take a historical tour of Ocean Reef. You will learn the history of the resort while admiring the beautiful scenery on your own beach cruiser. Please reserve your spot with Ocean Reef as soon as possible due to limited availability.

Those 10 years and older can enjoy Bike Tours for \$39 per person. Reservations should be made through the concierge desk.

**10:30 a.m.-12 p.m. Region 6 Board Meetings** in the Tarpon Room.

**9 a.m.-5 p.m. Recreation** Enjoy your choice of boating, lagoon, spa or just lounging at the pool.

**7-10 p.m. FICPA Educational Foundation Beach Luau presented by Chase**

Special Guest Presentation from Chase, available only to Luau attendees (1 hour of CPE credit).

Additional guest presentations will be announced in the upcoming months.

Beach Luau requires reservation at time of room booking or with concierge and prior payment for admission (\$75 adult/\$25 kids).

**10 p.m.-1 a.m. Dancing and Fun** Go out to the Burgee Bar to continue the night!

## SUNDAY, AUGUST 3

The morning and early afternoon are open – members may choose an exceptional Sunday brunch at the Ocean Room, boating, lagoon, spa treatments or just lounging at the pool.

**1 p.m. Late Checkout** (upon request)



# How to Attend

*Rooms: \$155 plus taxes  
(single or double - kids free in room with parents)  
Saturday Night Beach Luau Dinner  
\$75 Adult / \$25 Child  
Separate reservation and payment is necessary.  
Please tell the reservation agent at the time of  
booking that you wish to attend!*

**To ensure room availability, please schedule reservations by June 30, 2014.**

*For Room/Luau Reservations, Call Ocean Reef Resort  
at (800) 741-7333 or email [reservations@oceanreef.com](mailto:reservations@oceanreef.com)  
and mention the FICPA Educational Foundation Family Retreat.*

For more information, contact Jason Zaborske at the FICPA Educational Foundation at (850) 224-2727, Ext. 417, or [zaborskej@ficpa.org](mailto:zaborskej@ficpa.org);  
George Gulisano, Event Co-Chair, at (786) 376-3187  
or [gulisano@bellsouth.net](mailto:gulisano@bellsouth.net); or Jason Chorlins, Event Co-Chair  
at (314) 368-0887 or [jchorlins@kaufmanrossin.com](mailto:jchorlins@kaufmanrossin.com).



# Sponsorship Benefits and Levels

## PRIMARY – \$10,000 (Exclusive) **SOLD**

- Prominent name/logo placement on all Family Retreat signage and promotions and exclusivity for sponsor's industry (except golf tournament sponsors)
- Exclusive sponsor of the Luau Dinner, speaking role at the dinner, name/logo on all signage ensuring company exposure to all attendees
- Entitles sponsor to five (5) rooms (single or double occupancy) for three (3) nights at the exclusive Ocean Reef Club in Key Largo (\$2,325 value)
- Ten (10) tickets for the Saturday night Luau dinner (\$750 value)
- Eight (8) entries into the 18-hole golf scramble tournament (\$1,200 value)
- Name/logo recognition and direct company weblink on **www.ficpa.org**
- Name recognition on all event correspondence, emails and inclusion of sponsor information in all welcome packages
- Opportunity to attend all retreat events and obtain additional rooms at the special \$155 room rate per night (kids stay free in parent's room) and meet CPA attendees, speakers and sponsors throughout entire four-day event

## PLATINUM – \$5,000

- Entitles sponsor to two (2) rooms (single or double occupancy) for three (3) nights at the exclusive Ocean Reef Club in Key Largo (\$930 value)
- Four (4) tickets for the Saturday night Luau Dinner (\$300 value)
- Four (4) entries into the 18-hole golf tournament (\$600 value)
- Name/logo recognition and direct company weblink on **www.ficpa.org**
- Name/logo recognition on sponsor signage for Family Retreat
- Name recognition on all event correspondence, emails and inclusion of sponsor information in all welcome packages
- Opportunity to attend all retreat events and obtain additional rooms at the special \$155 room rate per night (kids stay free in parent's room) and meet CPA attendees, speakers and sponsors throughout entire four-day event

## GOLD – \$3,000

- Entitles sponsor to one (1) room (single or double occupancy) for three (3) nights at the exclusive Ocean Reef Club in Key Largo (\$465 value)
- Four (4) tickets for the Saturday night Luau Dinner (\$300 value)
- Two (2) entries into the 18-hole golf tournament (\$300 value)
- Name/logo recognition and direct company weblink on **www.ficpa.org**
- Name/logo recognition on sponsor signage for Family Retreat
- Name recognition on all event correspondence, emails and inclusion of sponsor information in all welcome packages
- Opportunity to attend all retreat events and obtain additional rooms at the special \$155 room rate per night (kids stay free in parent's room) and meet CPA attendees, speakers and sponsors throughout entire four-day event

# Sponsorship Benefits and Levels

## CHAIRMAN'S COCKTAIL – \$2,500 (Exclusive) **SOLD**

- Exclusive sponsor of the Chairman's Cocktail Reception, speaking role at the reception, name/logo on all signage ensuring company exposure to all attendees
- Entitles sponsor to one (1) room (single or double occupancy) for two (2) nights at the exclusive Ocean Reef Club in Key Largo (\$310 value)
- Two (2) tickets for the Saturday night Luau Dinner (\$150 value)
- Name/logo recognition and direct company weblink on [www.ficpa.org/oceanreef](http://www.ficpa.org/oceanreef)
- Name recognition on all event correspondence, emails and inclusion of sponsor information in all welcome packages
- Opportunity to attend all retreat events and obtain additional rooms at the special \$155 room rate per night (kids stay free in parent's room) and meet CPA attendees, speakers and sponsors throughout entire four-day event

## DIVE IN MOVIE – \$2,250 (Exclusive) **SOLD**

- Exclusive sponsor of the Dive In Movie, speaking role at the event, opportunity to select movie, and name/logo on all signage ensuring company exposure to all attendees
- Entitles sponsor to one (1) room (single or double occupancy) for two (2) nights at the exclusive Ocean Reef Club in Key Largo (\$310 value)
- Two (2) tickets for the Saturday night Luau Dinner (\$150 value)
- Name/logo recognition and direct company web link on [www.ficpa.org/oceanreefretreat](http://www.ficpa.org/oceanreefretreat)
- Name/logo recognition on sponsor signage for Family Retreat
- Name recognition on all event correspondence, emails and inclusion of sponsor information in all welcome packages
- Opportunity to attend all retreat events and obtain additional rooms at the special \$155 room rate per night (kids stay free in parent's room) and meet CPA attendees, speakers and sponsors throughout entire four-day event



# Sponsorship Benefits and Levels

## CPE BY THE SEA – \$2,000 (Exclusive) **SOLD**

- Exclusive sponsor of the CPE by the Sea, speaking role at the event, name/logo on all signage ensuring company exposure to all attendees
- Entitles sponsor to one (1) room (single or double occupancy) for two (2) nights at the exclusive Ocean Reef Club in Key Largo (\$310 value)
- Two (2) tickets for the Saturday night Luau Dinner (\$150 value)
- Name/logo recognition and direct company weblink on [www.ficpa.org](http://www.ficpa.org)
- Name/logo recognition on sponsor signage for Family Retreat
- Name recognition on all event correspondence, emails and inclusion of sponsor information in all welcome packages
- Opportunity to attend all retreat events and obtain additional rooms at the special \$155 room rate per night (kids stay free in parent's room) and meet CPA attendees, speakers and sponsors throughout entire four-day event

## SILVER – \$1,750

- Entitles sponsor to one (1) room (single or double occupancy) for two (2) nights at the exclusive Ocean Reef Club in Key Largo (\$310 value)
- Two (2) tickets for the Saturday night Luau Dinner (\$150 value)
- Name recognition on sponsor signage for Family Retreat
- Name recognition on all event correspondence, emails and inclusion of sponsor information in all welcome packages
- Opportunity to attend all retreat events and obtain additional rooms at the special \$155 room rate per night (kids stay free in parent's room) and meet CPA attendees, speakers and sponsors throughout entire four-day event

## BRONZE/FICPA CHAPTER – \$750

- Entitles FICPA Chapter to a free opportunity to host a private Chapter meeting during the event
- Entitles sponsor to one (1) room (single or double occupancy) for one (1) night at the exclusive Ocean Reef Club in Key Largo (\$155 value)
- Two (2) tickets for the Saturday night Luau Dinner (\$150 value)
- Name recognition on all event correspondence, emails and inclusion of sponsor information in all welcome packages
- Opportunity to attend all retreat events and obtain additional rooms at the special \$155 room rate per night (kids stay free in parent's room) and meet CPA attendees, speakers and sponsors throughout entire four-day event

To sponsor and create a new special event, please contact **George Gulisano**, Event Co-Chair, at (786) 376-3187 or [gulisano@bellsouth.net](mailto:gulisano@bellsouth.net).



# Sponsorship Agreement

EDFS2

COMPANY NAME: \_\_\_\_\_

REPRESENTATIVE: \_\_\_\_\_ TITLE: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY, STATE: \_\_\_\_\_

TELEPHONE: \_\_\_\_\_

EMAIL: \_\_\_\_\_

## SPONSORSHIP LEVEL (CIRCLE ONE)

- |   |  |
|---|--|
| <input type="radio"/> Primary \$10,000 <b>SOLD</b>                      | <input type="radio"/> Dive In Movie \$2,250 <b>SOLD</b>  |
| <input type="radio"/> Platinum \$5,000                                  | <input type="radio"/> CPE by the Sea \$2,000 <b>SOLD</b> |
| <input type="radio"/> Gold \$3,000                                      | <input type="radio"/> Silver \$1,750                     |
| <input type="radio"/> Chairman's Cocktail Reception \$2,500 <b>SOLD</b> | <input type="radio"/> Bronze/FICPA Chapter \$750         |

## Terms and Conditions

All event details, decision-making, negotiations with other organizations, awards and other preparations shall be under the supervision and responsibility of the FICPA Educational Foundation and its decisions shall be binding.

All aspects of the retreat belong to the Foundation. The Foundation will handle publicity for the event. The Foundation will give sponsors all possible exposure through identification on applications, print advertising and awards ceremony as specified in the sponsor level.

In consideration of costs and services to be incurred by the Foundation, it is understood that funds received are nonrefundable and the Foundation shall retain all sponsor fees. Your signature below indicates you understand and agree to the terms of this application and agree to pay at the sponsorship level indicated above. If you do not send payment with this agreement, you understand you will be invoiced for the sponsorship level indicated above which is payable in full upon receipt.

\_\_\_\_\_  
Company Representative Signature

\_\_\_\_\_  
Date

**Please mail this sponsorship agreement and a check made payable to the FICPA Educational Foundation, P.O. Box 5437, Tallahassee, FL 32314-5437.**

**Please contact George Gulisano, Event Co-Chair, at (786) 376-3187 or [gulisanog@bellsouth.net](mailto:gulisanog@bellsouth.net).**

The Florida Institute of Certified Public Accountants' Educational Foundation, Inc. is recognized as tax exempt under section 501(c)(3) of the Internal Revenue Code. Contributions are tax deductible to the fullest extent of the law.

A COPY OF THE OFFICIAL REGISTRATION (#CH2614) AND FINANCIAL INFORMATION MAY BE OBTAINED FROM THE DIVISION OF CONSUMER SERVICES BY CALLING TOLL-FREE (800) 435-7352 WITHIN THE STATE. REGISTRATION DOES NOT IMPLY ENDORSEMENT, APPROVAL, OR RECOMMENDATION BY THE STATE.

# Ocean Reef Restaurants

**The Islander & Pelican Bar** — Serves dinner, (305) 367- 5862. Fresh, flavorful Florida Keys seafood prepared in a variety of ways and presented in appetizers and main courses. Sushi and sashimi are made-to-order by the resident sushi chef. A variety of wines and a full cocktail service are available.

**The Ocean Room** — Serves breakfast and special dining, (305) 367-5884. Open daily for a legendary breakfast. Indulge in fresh-baked pastries, hearty country selections, meats, fruits, cereals, omelets and waffles made-to-order. Get fresh, light selections from the healthy start menu and relax with panoramic ocean views.

**The Galley Restaurant** — Only serves dinner, (305) 367-5879. Located in The Fishing Village, The Galley has spectacular views of the marina, Tarpon Creek and famous Keys sunsets. Fresh fish, pasta dishes and a lengthy list of mouth-watering pizzas cooked in a wood-burning oven.

**The Burgee Bar** — Light bites, (305) 367-7790. A waterside headquarters for family-friendly dining on The Reef. Separate game room for children downstairs with pool tables, video games and more. Flat-screen TVs, pool tables and a sand shuffleboard make this a fun outing. Extensive selection of beer, wine and refreshing tropical cocktails.

**The Raw Bar** — Serves lunch, (305) 367-5818. Informal atmosphere; located in The Fishing Village. Freshest oysters, clams, stone crabs (in season) and shrimp as well as a variety of fish direct from local waters. Grilled sandwiches, burgers, salads and full bar service.

**The Beach Grill** — Serves lunch and snacks. Menu full of appetizing family favorites at Buccaneer Island; enjoy lunch or snacks without leaving the beach.

**The Beach Bar** — Buccaneer Island Poolside, (305) 367-7672. Fresh-fruit, tropical concoctions. Atlantic-side beach views let you watch the return of fishing fleets and ocean yachts.



# Thanks from the Students

Dear Friends and Colleagues,

It is a privilege to serve as co-chairs of the 6th Annual Retreat at Ocean Reef. The purpose is to gather FICPA members in a beautiful, social setting to promote our profession and increase awareness and support of the FICPA's Educational Foundation. The Foundation provides scholarships to future accountants who will lead our great profession in the decades to come. It has funded more than \$700,000 in the past five years alone. The first five retreats were a tremendous success. They were attended by more than 700 CPAs and their families, raising more than \$65,000 for the Foundation and establishing a new \$35,000 endowment – the George A. Gulisano Endowment Fund – to help deserving accounting students in Florida.

Scholarships to need-based individuals make an enormous impact on the lives of young people. George can personally attest to this dream. He would not have attended the University of Miami and enjoyed the past 30 years in our great profession were it not for the generosity of a scholarship that was established by a charitable benefactor.

We hope what you read about this year's retreat, including the sponsorships available to your organization, will inspire you to attend or become a sponsor. As a sponsor, you will be recognized in all publications, fliers and emails to more than 18,000 FICPA members all over the great State of Florida.

We hope you will attend the family retreat and make new friends and lasting memories with our families. The event has quickly become a showcase for our great foundation, and it won't be the same without you!

If you would like more information, please feel free to contact George (at [gulisano@bellsouth.net](mailto:gulisano@bellsouth.net) or (786) 376-3187) or Jason (at [jchorlins@kaufmanrossin.com](mailto:jchorlins@kaufmanrossin.com) or (305) 857-6764).

Sincerely,

George A. Gulisano CPA

Jason Chorlins, CPA CFE CAMS

Co-Chairs of the 2014 FICPA Educational Foundation Family Retreat



# Thanks to our 2013 Sponsors

## DIAMOND AND BEACH LUAU SPONSOR



## PLATINUM SPONSOR



## PRESIDENT'S COCKTAIL RECEPTION



## DIVE-IN MOVIE SPONSOR



GAG Consulting Services, Inc.  
George A. Gulisano CPA- President  
gulisano@bellsouth.net

## CPE BY THE SEA



## SILVER SPONSORS



## FICPA CHAPTERS

Atlantic Chapter • Miami Dade Chapter  
Miami Downtown Chapter  
North Dade-South Broward Chapter • South Dade Chapter