

Matt Street Journal

Winter 2010 Edition



This beautiful Cardinal was painted by one of our very special clients, Mrs. Betty McCourtie of Tallmadge, Ohio. Mrs. McCourtie will be celebrating her 93rd birthday this year!

Happy New Year...From John Boyer Inc.

Another year is upon us and although 2009 was not without it's ups and downs, many of us have so much to be thankful for. We would like to express our gratitude for your trust and faith in us. We truly enjoy the relationship we have with each client, and it is our pleasure to have you all as part of our family. We wish you all a wonderful & successful 2010!

Cost Basis Reporting On Schwab Statements

As many of you have noticed Schwab Institutional has begun reporting cost basis on their monthly statements. This is in an effort to comply with many new regulations that custodians are being faced with in regards to reporting this information.

We have been working closely with Schwab since Mid-2009 in an effort to get the correct information to them. However, this has not been without bumps in the roads. If you have received a statement that you believe has incorrect cost basis information, please give Sarina a call so that she can help get the correct numbers to Schwab to prevent any future problems. Although this is a new and pain staking process for many custodians, we believe it will prove to be extremely beneficial as the years pass.

THANK YOU...

We would like to give an extended thank you to Mark & Denise Hartzell for assisting us with the Holiday donation drive in the Canton area for the Christian Children's Home of Ohio (CCHO). Every year Mark & Denise go above and beyond their client duties to deliver the gifts in honor of all of us.

Thank you once again!

If you would like more information or would like to make a donation to CCHO, please visit their website at:

www.ccho.org
(330) 345-6276

***A goal without a plan is
just a wish.***

Antoine De Saint-Exupery

COMING EARLY SPRING...

We are very excited to share that John Boyer Inc. will have a new website that is expected to launch in late February. This has been a project that our firm has been working on for the past several months and we can't wait to share it with the "virtual" world.

www.johnboyerinc.com



NEW CONFERENCE CALL DATES!!!

2010 CONFERENCE CALL SCHEDULE

Please join us on the 3rd THURSDAY of each month @ 3pm!!!

February 18, 2010
March 18, 2010
April 15, 2010
May 20, 2010
June 17, 2010
July 15, 2010
August 19, 2010
September 16, 2010
October 21, 2010
November 18, 2010
December 16, 2010

Instructions:

DIAL: (800) 606-4616

When prompted to enter the room number, enter the following:

***8132549500#**

DON'T FORGET THE "*" and the "#"!!!!

Contact Us

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