

Richard Whiteley is a successful entrepreneur, consultant and award-winning author. He is the Principal of The Whiteley Group, an international speaking and consulting firm. An entrepreneur and practitioner first, in 1971 he co-founded The Forum Corporation and helped built it into a 700 person industry leading, global training and consulting company which was sold in 2000. During those 29 years Forum's average annual shareholder return was 36%. During this time he also co-founded a specialty retail chain based in Boston. Richard's presentations, like his books, are known for their practicality and usefulness because of this "hands on" background.

First and foremost Richard considers the audience members to be his primary customers and tailors each presentation to create high impact, take-home value for every participant. His work with over 300 different companies in twenty-six countries and presentations to over 350,000 business people, his access to continuing topical research, and his personal experience in building his own successful companies, ensure that the ideas and principles offered are practical and based on the most pressing and contemporary issues facing business.

Richard's extensive knowledge of current business challenges and dynamic presentation style have brought him acclaim as a powerful speaker. Among his notable US clients are American Express, 3M, Motorola, Microsoft, Marriott and Delta Airlines. International clients include Thomas Cook, Mercedes-Benz, Vodafone and the Hong

Kong and Shanghai Bank. Richard is a frequent speaker at major trade association meetings, industry conventions, and professional groups such as The Young President's Organization, The European Foundation for Quality, the Japan Management Association and the Federal Executive Institute. He is also a guest lecturer at leading colleges and universities including MIT's Sloan School of Management, The University of Southern California and Babson College.

The first of Richard's award-winning best sellers, *The Customer-Driven Company*, was named one of the top four business books of 1991 by *Fortune Magazine*. It has become a classic of management literature and was recently cited by *Human Resource Executive Magazine* as one of the top ten books of the decade. *Customer-Centered Growth*, which followed in 1996, was a *Business Week* best seller and was named one of the top five business books by *Selling Magazine*. Richard's third book, *Love the Work You're With: How to Find The Job You Always Wanted Without Leaving the One You Have* was published in 2001 and is a best-seller. In 2002 *The Corporate Shaman, A business Fable* was published. All his books have been translated into multiple languages.

Richard has appeared on national and local television and radio, was featured in American Airlines magazine, *Flightline*, and is a frequent commentator in the business press. He has authored two video programs, *Customer-Driven Quality* with *Fortune Magazine* and *Solving the Leadership Puzzle*, featuring the Kansas City Chiefs professional football team. His audiotape of *Customer-Centered Growth* was recorded in 1996.

In 1978 Richard founded and later served as president of The Instructional Systems Association, a group of leading national training companies. ISA now has over 150 members and in 1995 presented Richard with its highest honor, the Distinguished Service Award. He is currently on ISA's Advisory Council.

Richard received his undergraduate degree from Wesleyan University and his MBA from The Harvard Business School following three years of service in the United States Navy. He created The Sunrise Foundation, a non-profit enterprise supporting children with learning disabilities. He serves on Boards of The Ken Blanchard Companies, Daffys, COE Express, and is a Trustee of the Carroll School.



SPEAKING PHILOSOPHY AND TOPICS

SPEAKING PHILOSOPHY

"In each and every speaking engagement it is my purpose to model what I have written about customer service. I dedicate myself to the success of every event and consider the people in the audience and the individual(s) who have hired me to be my primary customers. Because I believe 'one size fits one' every presentation is tailored to the specific objectives and situation of my customers. No two are the same."

TOPICS FOR PRESENTATION

Customer Centered Growth:

How to Create and Retain Customer Loyalty

The staggering array of options aggressive competitors put in front of today's customers has caused a shift in power from the seller to the buyer. And all the while, the Internet is dramatically changing these relationships. Based on material from Richard's two best-selling, award winning books, *The Customer Driven Company* and *Customer Centered Growth*, this presentation focuses on five proven strategies that will enable any organization to gain customer loyalty by learning what the world's best companies do to target, attract, and retain valuable customers. This presentation includes a seg-ment on how the Internet is transforming customer relation-ships. A self-assessment diagnostic is optional.

ReSpiriting Work:

How to Bring Spirit and Passion to Your Work

In today's challenging and chaotic times, all too often employees have become confused and dispirited. Based on Richard's book, *Love The Work You're With*, this uplifting presentation offers six "ways of being" which, when

embraced by people in an organization, can lead to greater joy *and* productivity. A self-assessment diagnostic is optional. The Ways of Being are: Be Home, Follow Your Passion, Create Your Own Reality, Get out of Your Own Way, Declare Your Interdependence, and Be Yourself.

How to Create the Branded Customer Experience TM:

A strong brand means competitive advantage and increased profitability. Today's successful companies go beyond the traditional view of brand and align both their people and their processes to create the Branded Customer Experience. TM This presentation will focus on a new approach to brand and how to make every customer interaction consistent, intentional, differentiated, and valuable every time

High Impact Leadership:

Best Practices for Leading In Times of Rapid Change

Now, more than ever, in today's fast changing times, there is a call for effective leadership. The problem is that many of the leadership practices that led to success as recently as five years ago are no longer effective. This presentation highlights the critical few leadership actions and characteristics that have the most leverage on creating superior performance. These include, A Passionate Connectedness to the Enterprise, Creating Meaning, Mobilizing the Organization, Inspiring Others, and Looking Within.

Selling Through Service:

How to Create the Relationship Advantage

Today's buyers are leery of the "one-call-close" artists and have developed an uncanny ability to "read" the intentions of the sales people who come into their offices. This presentation reviews the critical core competencies required today to create long term, profitable customer relationships. The presentation is based on the attitudes and competencies that superior performers demonstrate as they consistently surpass challenging performance standards. They are: Focus on the Customer, Earn the Right to Advance and Persuade Through Involvement.



TESTIMONIALS FROM PRESENTATIONS

"Your message was very well received by our team and has focused our attention on the importance of customer satisfaction to the future of our business. The clarity of your talk and the pragmatic approach of your book have been extremely helpful in gaining the commitment of our management team."

William Warwick, President

AT&T Microelectronics

"I felt our workshop was terrific. Whatever concerns I had quickly evaporated when you took over the audience and got people going. I congratulate you on doing a fine job."

Roy Zucherman, Partner

Goldman, Sachs & Co.

"I would be making a terrible mistake if I did not take this moment to thank you for your outstanding presentation to our managers. Your talk, especially the way you wove in the office managers' new compliance responsibilities, really hit the nail on the head. Their applause was one indication. We all walked out of the meeting with the inspiration to put your thoughts into action."

William Daley, General Director

John Hancock

"I wanted to take this opportunity to let you know how much I enjoyed your presentation last Tuesday. The program was short, to the point, and gave participants tangibles to take back to their companies.

Linda Paulmeno, Manager, Corporate Programs Mercedes-Benz

"Your presentation served to motivate our sales force. It seemed like everything we discussed a couple of weeks before the meeting found its way into your talk. All the comments were positive like: 'The best speaker we ever had'; 'Wish it

could have been longer'; and "Where can I get his book to learn more?' You struck a chord with our salespeople and it was the exact message I wanted them to hear.

Ruth Unzicker

Kodak

"It was interesting to see the evaluation forms. Your presentation was frequently rated "5+++" (1 to 5 rating scale). You really did a wonderful job and it added greatly to the success of our conference."

Richard Munn, Chairman

Information Technology Services Marketing Association

"Our company is the leading seminar organization in Latin America. We have had such experts as Peter Drucker, Tom Peters, Lee Iacocca, Philip Kottler, Michael Porter and others. Richard Whiteley was simply one of the best speakers we have ever had. He is the only speaker to have ever received a perfect score from our attendees. The big difference between Richard and other speakers is that he can tell an audience how to make it happen in a very practical and entertaining way. We are particularly delighted with the time he took to learn about our audiences to make the presentations directed to them."

José Salibi Neto, Managing Director

HSM Cultura & Desenvolvimento

"Customer service workshop was phenomenal"

"Richard Whiteley increased my expectations. His session made the entire event worthwhile."

"YAH FREAKING HOO!

"This was fantastic. Practical. Can use the information immediately."

"Richard is amazing! Keep him coming back."

"Very good presentation style...lot's of audience participation...lots of style and content and humor"

Audience comments from Microsoft Partners' presentation



ENDORSEMENTS FROM BOOKS

FROM CUSTOMER-CENTERED GROWTH:

"A superb highly readable book-an invaluable resource in today's global business environment. A useful guide to help generate corporate growth."

J.W. Marriott, Jr.

CEO

Marriott Corporation

"In modern business, the vital role of management is to come out of the office and boardroom to the point of sale or service delivery. Customer-Centered Growth gets that message across very clearly and is to be commended."

Sir Colin Marshall

Chairman British Airways

"Customer-Centered Growth hits the nail right on the head. Richard Whiteley and Diane Hessan have laid out the winning formula for today's hyper-competitive markets. As I think of our company's turnaround, I clearly see the critical roles Whiteley and Hessan's 'five proven strategies' can play."

G. Richard Wagoner

President, North America Operations General Motors Corporation

"Whiteley and Hessan have managed to advance customer focus from telling 'stories' to showing 'how' managers can really make a difference in the marketplace. After reading it with a critical eye, I am convinced that it is all there: This is an essential reference text for managers who want to make a difference with customers."

Leonard Schlesinger

Professor Harvard Business School

FROM THE CUSTOMER DRIVEN-COMPANY:

"Readable, research-based. The two seldom go hand in glove. They do in these pages. Richard Whiteley has moved the discussion of customer-driven companies up a whole notch. This wonderful book is alive with cases, statistical wisdom and phenomenally sound advise. This is what a lot of us, practitioners and advisors, have been waiting for. Bravo!"

Tom Peters

Author/Speaker

"As this book demonstrates, the managers who know and serve their clients best will be the winners. The Customer-Driven Company provides the most comprehensive blueprint for building a successful service company."

Charles Schwab

Chairman and Founder Charles Schwab & Co., Inc.

"Mr. Whiteley has focused on the most basic reality for business-there's only one reason to be in business and that's to organize assets and motivate employees for the purpose of serving customer needs. Any manager will find useful guidance in Mr. Whiteley's book."

R.L. Crandall

Chairman American Airlines

"Quality demands action. Theory alone won't move your firm an inch toward quality improvement. Richard Whiteley pro-vides the reader with helpful guideposts along the way."

Charles Cawley

President and CEO MBNA America



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FROM LOVE THE WORK YOU'RE WITH:

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Leonard Schlesinger

Professor Harvard Business School

FROM THE CORPORATE SHAMAN:

"An engaging illustration of how the wisdom gained throughout the ages has powerful relevance to modern business dilemmas."

Deepak Chopra

Author of Grow Younger, Live Longer

"I loved the book! It is a real breakthrough...It reveals the role that intuition will play in empowering the corporate leader of the future. I highly recommend it to today's corporate leaders—and to those who want to become one."

Patrick McGovern

Chairman of the Board IDG International Data Group

"I found Richard Whiteley's new book *The Corporate Shaman* to be very engaging and different from anything I have ever read. I read it in one sitting because I simply could not put it down."

Charlie Eitel

Chairman and CEO the Simmons Company

"A stimulating and creative application of shamanism to modern life."

Michael Harner

Author of The Way of The Shaman

ENDORSERS OF PREVIOUS BOOKS*

*titles and positions may have changed and reflect each individual's status at the time of publishing date

BUSINESS LEADERS

Herb Kelleher CEO, Southwest Airlines

David Pottruck, coCEO, Charles Schwab & Co. Inc.

David T. Kearns, Chairman, Xerox Corporation

R.L. Crandall, Chairman, American Airlines

Sarah M. Nolan, President, Investment and Insurance Services Group, American Express

Charles Schwab, Chairman and Founder, Charles Schwab & Co. Inc.

G. Richard Wagoner, Jr., President, North American Operations, General motors

Sir Colin Marshall, Chairman, British Airways

Scott Bell, Group Managing Director, Standard Life

Connie Duckworth, Advisory Director, Goldman Sachs

Steve Bonner, CEO, Cancer Treatment Centers of America

Charles M. Cawley, President and CEO, MBNA America

Richard Atlas, Partner, Goldman Sachs

A. Collette Burke, President, Mott's North America

Craig Weatherup, President and CEO, Pepsi-Cola North America

Charles Eitel, Chairman and CEO, The Simmons Company

Patrick McGovern, Chairman, IDG International Data Group

AUTHORS

Deepak Chopra, Grow Younger, Liver Longer

Tom Peters, In Search of Excellence

Dr Stephen Covey, The Seven Habits of Highly Effective People

Ken Blanchard, The One minute Manager

Rosabeth Moss Kanter, World Class: Thriving in a Global Economy

Martin Rutte, coauthor of Chicken Soup for the Soul at Work

Carl Sewell, Customers for Life

Stan Davis, Blur

Marcia Weider Making Your Dreams Come True

Michael Harner, The Way of the Shaman

Joan Borysenko, PhD, Inner Peace for Busy People

ACADEMICS

Roy D. Shapiro, Jesse Philips Professor of Manufacturing, Harvard Business School

Jagdish N. Sheth, PhD, Emory University Goizueta Business School

Jeffrey A. Timmons, Professor of Entrepreneurial Studies, Babson College

Arthur Taylor, Dean Fordham School of Business

Leonard A. Schlesinger, George F. Baker, Jr. Professor of Business Administration,

Harvard Business School



OTHER WRITING BY RICHARD WHTITELEY

CONTRIBUTING AUTHOR:

LEADING AUTHORITIES ON BUSINESS

Winning Strategies from the Greatest Minds in Business Today

THE PERFORMANCE IMPERATIVE

Strategies for Enhancing Workforce Effectiveness

"A unique and nationally prominent group of thinkers and practitioners."

BUSINESS THE ULTIMATE RESOURCE

"A veritable who's who of contemporary business authorities."

∉# BEST OF CLASS

Building a Customer Organization

"An inspiring collection of the best and brightest thinking on service leadership."



PARTIAL CLIENT LIST

≇ ASSOCIATIONS & INSTITUTES

American Chamber of Commerce Bank Administration Institute LIMRA

National Roundtable on Quality The Conference Board

The Young Presidents Organization (YPO)

European Foundation for Quality Control Japan Management Association Singapore Productivity Board

AUTOMOTIVE

Ford
Saturn
General Motors
Mercedes-Benz
Renault
Toyota

Babson College Northeastern University Sloan School at MIT TCU USC

∉ CONSTRUCTION

Archstone David Weekley Homes Intrawest

∉ CONSUMER GOODS

Campbell Soup Company Gillette Kraft-General Foods Labatt's Breweries Philip Morris International

FINANCIAL SERVICES

American Express
Bank of Boston
Citibank
Morgan Guaranty
ANZ Bank
Banco Mercantile
Bank of Montreal
Midland Bank
Hong Kong Shanghai Bank

∉# GOVERNMENT

U.S. Department of the Navy U.S. Navy Personnel Command Treasury Executive Institute U.S. Dept. of Agriculture U.S. Dept. of Labor

∉# HEALTHCARE

Blue Cross Blue Shield Kaiser Permanente NYLCARE Scripps AMIL

HIGH TECH

Hewlett-Packard
Lucent Technologies
Microsoft
Sun Microsystems
IBM
Motorola
Telecom Argentina
Northern Telecom
Vodafone

HOSPITALITY & ENTERTAINMENT

Hyatt International ITT Sheraton Landmark Communication Marriott Corporation Sea World

INSURANCE

Aetna Fireman's Fund John Hancock Metropolitan Life Prudential Manulife Financial Standard Life Sun Life

INVESTMENT COMPANIES

Brown Brothers Harriman Fidelity Investments Goldman, Sachs and Co. NASDAQ

PHARMACEUTICALS

Pfizer

NON-PROFITS

American Cancer Society Chamber of Commerce Junior Achievement March of Dimes

MANUFACTURING & PROCESSING

Allied Signal
Dow Corning
DuPont
GE
Hughes Aircraft
Imperial Oil
3M
Southern California Edison
CAEMI International

PUBLISHING

Dun & Bradstreet FORTUNE Harcourt General McGraw Hill N.E. JOURNAL OF MEDICINE

∉# RETAIL

AMWAY
Coastal Mart
Estee Lauder Companies
Neiman Marcus
Pizza Hut
ESSO Caribbean
Tesco
Thomas Cook Travel

∉# SERVICE

Deloitte & Touche EDC KPMG PricewaterhouseCoopers ABB HSM Sintagma

TRANSPORTATION

Delta Airlines Ryder Sea-Land Services Air Canada British Airways Canadian Pacific



HOW TO CREATE CUSTOMER LOYALTY BY Creating a customer-centered Organization

Objectives:

You will:

- •understand the benefits of becoming customer-centered
- •learn the best practices of world class customer-centered organizations
- •assess the extent to which your organization utilizes the best practices
- •identify opportunities for improvement.

Content:

This presentation is based on Richard Whiteley's two award-winning and best-selling books: The Customer Driven - Company and Customer-Centered Growth and research with over 200 organizations on six different continents. It focuses on the five proven strategies that outstanding customer-centered companies utilize to create growth and profitability through increased customer loyalty and retention. The five strategies are:

- •Moving from Identity Crisis to Laser Beam Focus
- •Moving from Listening to Hardwiring the Voice of the Customer
- •Moving from "Teamitis" to Universal Collaboration
- •Moving from Customer Satisfaction to Lasting Customer Enthusiasm
- •Moving from Facilitative Leadership to Contact Leadership
- •A segment of this session will be devoted to the Internet and its impact on acquiring and maintaining effective customer relationships.

Methods:

Interactive presentation with audience involvement. Case examples, statistics, and research.

Target Audience:

Executives, sales and marketing personnel, product developers, technical staff and administrative and support personnel. Because delighting the customer is the responsibility of every company employee this is a very effective combined session for people from all functions and levels within the organization.

Duration:

45 minutes to a full day workshop

Options:

A self-assessment questionnaire can be administered before, during or after the presentation to help each participant customize the concepts to his/her unique situation.



RESPIRITING WORK: HOW TO FIND THE JOB YOU ALWAYS WANTED WITHOUT LEAVING THE ONE YOU HAVE

Objectives:

You will:

- •explore how to get the most out of the job you have
- •learn six "Ways of Being" that lead to greater productivity and joy at work
- •assess where you are by completing a self-assessment diagnostic create plans for improvement (optional for leader and managers)
- •learn how to ReSpirit your own organization or work group

Content:

Based on Richard's book, Love the Work You're With, this engaging presentation will explore six "Ways of Being" that can help virtually anyone find greater productivity and joy at work. The overriding principle is simply that the job you've got is the job you've got, so what's to lose by trying to make the most of it.

The six "Ways of Being" are:

- •Be Home
- •Follow Your Passion
- •Create Your Own Reality
- •Get Out of Your Own Way
- •Declare Your Interdependence, and
- •Be Yourself

Each participant will have the opportunity to complete a self-assessment questionnaire that will help him/her identify where and how to ReSpirit his/her own work situation. A specially designed segment for leader and managers can be added to this presentation. It focuses on what they can do to create the kind of environment that generates high levels of positive energy and spirit in their work units.

Methods:

Highly interactive with significant audience involvement and individual and small group work. Case examples, statistics, and research.

Target Audience:

All employees throughout the organization the organization. Leader and managers.

Duration:

60 minutes to a full day workshop.

Options:

A self-assessment questionnaire can be administered before, during or after the presentation to help each participant customize the concepts to his/her unique situation.

Leader/manager segment (see above)



HOW TO CREATE THE BRANDED CUSTOMER EXPERIENCE™

Objectives:

You will:

- •understand the definition and importance of brand
- •learn best practices from world class companies with powerful brands
- •discover the secret weapon for creating a strong brand
- •assess your own brand's strength and impact.

Content:

Based on research and the Branded Customer Experience (BCE)TM model developed by The Forum Corporation this proven approach to increasing the impact of a company's brand is offered in an exciting and high impact presentation.

Rather than measure the typical CSI (Customer Satisfaction Index), a more relevant measure will be presented... the CEI (Customer Experience Index). Since a brand is essentially a promise, the CEI is a preferred method for determining the extent to which that promise is kept.

In addition to the traditional marketing "P's" (Packaging, Promotion, Placement and Price) Branded Customer ExperienceTM requires two more all important but often overlooked P's: Processes and People. Using the BCE model, participants will learn how to make every customer interaction consistent, intentional, differentiated and valuable every time.

Methods:

Interactive presentation with audience involvement. Case examples, statistics, and research.

Target Audience:

Executives; sales and marketing; product developers; manufacturing personnel.

Because it is the responsibility of every company employee to keep the brand promise this is a very effective combined session for people from all functions and all levels.

Duration:

45 minutes to? day



LEADERSHIP IN THE NEW MILLENNIUM

Objectives:

You will:

- •understand the dramatic business and human dynamics that call for a new leadership paradigm
- •explore the attitudes and best practices of today's most effective leaders
- •identify areas for self improvement.

Content:

Research indicates that leaders are most confident in their ability to develop a powerful strategy and least confident in their ability to align their people to execute it. In the next five years the relative importance of today's competencies like strategic planning, decision making, and performance management will be replaced by adaptability, flexibility and the ability to learn.

This presentation will examine the Six C's of Effective Leadership. The leader must be: Clear, Conspicuous, Consistent, Candid, Courageous and Centered.

In addition, building on the research presented in Richard video, Solving the Leadership Puzzle, in order to succeed today, a leader must have: A Passionate Connectedness to the Enterprise and the ability to Create Meaning for, Mobilize, and Inspire the people they lead.

Methods:

Interactive presentation with audience involvement. Case examples, statistics, and research.

Target Audience:

All leaders, managers, and supervisors

Duration:

45 minutes to one day

Options:

A self-assessment questionnaire can be administered before during or after the presentation to help each participant customize the concepts to his/her unique situation Other possible topics:

- •How to deal with problem employees
- •How to create a vision for your work group
- •How to get employees to understand and support change



SELLING THROUGH SERVICE: HOW TO CREATE THE RELATIONSHIP ADVANTAGE

Objectives::

You will:

- •understand the attitudes that are critical to "Championship Selling"
- •learn the best practices of today's outstanding sales people
- •explore the typical mismatch between a buyer's needs and the salesperson's approach
- •assess where you can improve

Content:

With the Internet shrinking the world's sales population, those who are left must be the absolute best. This presentation will offer the three core attitudes that lead to sales excellence and the critical few practices that create such results. The core attitudes are:

- •Focus on the Customer
- •Earn the Right to Advance, and
- •Persuade through involvement
- •The critical practices include:
- •Using "hi-gain" questions
- Summarizing
- •Advancing the sales situation
- •Selling through service
- Story telling

Methods:

Interactive participation with audience involvement. Case examples, statistics, and research.

Target Audience:

All sales people; sales support staff; sales executives; sales managers. The material can be modified for veteran or new sales people and for selling a service or product.

Duration:

45 minutes to one day

Options:

A self-assessment questionnaire can be administered before, during or after the presentation to help each participant tailor the concepts to his/her unique situation.

- •Other possible topics:
- •Effective sales management
- •Once again now, how to handle an objection
- •Opening and closing the sales call
- •Four steps to customer-keeping service



ABOUT US

The Whiteley Group is dedicated to helping individuals and organizations around the world expand and realize their potential.

This is accomplished by offering relevant and practical solutions to the complex problems that confront organizations and individuals in today's rapidly changing business environments.

Such results are achieved by designing and presenting exciting and provocative speeches and workshops that are customized to each client's unique situation.

We are guided by three core values. They are: create value be authentic have fun

The principle and founder of The Whiteley Group is Richard Whiteley, a successful entrepreneur, best selling and award winning author, and celebrated international speaker. He has gained practical, "hands on" business experience by founding a training company and growing it into an industry-leading, 700 person global firm and by working with over 300 companies around the world. These experiences anchor both his books and presentations in practical, useful information presented in a captivating and enjoyable style

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