



MARKET VIEW

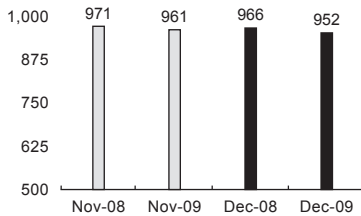
Volume 1, Issue 1

KANSAS CITY

April 2010

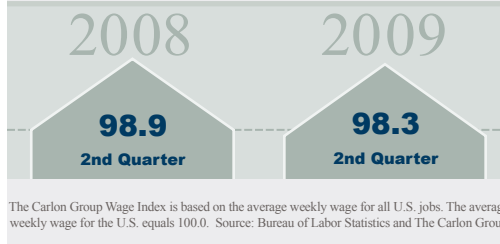
Kansas City Employment

Total Jobs in Thousands (000s) - NSA



Source: Bureau of Labor Statistics
NSA = not seasonally adjusted

The Carlon Group Kansas City WAGE INDEX



Kansas City Employment

National Unemployment Avg. 9.7% in February 2010 - NSA

Employment Change* Unemployment Rate

October-08	-195	6.0%
October-09	+218	8.4%
November-08	-3,400	6.2%
November-09	-909	8.4%
December-08	-5,633	6.5%
December-09	-9,325	8.6%

Source: Bureau of Labor Statistics
NSA = not seasonally adjusted
*Change from prior month

Kansas City Industry Profile

Kansas City Management Occupations

Occupation	No. of Employees	Hourly Mean Wage	Annual Mean Wage
Chief executives	3,710	\$74.29	\$154,530
General and operations managers	13,630	\$46.75	\$97,240
Sales managers	2,260	\$51.68	\$107,490
Computer and I/S managers	3,140	\$50.69	\$105,440

Source: Bureau of Labor Statistics May 2008 Most recent data available

Kansas City Market Snapshot

Private Sector Jobs

Total Kansas City Employment

2003	816,200
2004	823,700
2005	834,900
2006	848,300
2007	862,800
2008	865,500
2009	839,800

Source: Bureau of Labor Statistics

Government Jobs

Total Kansas City Employment

2003	142,500
2004	143,700
2005	144,100
2006	145,800
2007	150,500
2008	153,000
2009	153,700

Source: Bureau of Labor Statistics

Kansas City Real Estate Average Home Prices

October-08	\$159,711
October-09	\$158,074
November-08	\$155,195
November-09	\$160,621
December-08	\$152,687
December-09	\$152,858
U.S. Median	\$178,300

Source: Kansas City Regional Association of REALTORS®

Consumer Expenditures Kansas City Avg. Expenditures

Annual expenditures	\$46,308
Food	\$6,092
Housing	\$15,129
Utilities	\$3,419
Transportation	\$8,518
Health care	\$2,813
Entertainment	\$2,095

Source: Bureau of Labor Statistics 2004/05 Survey
Most recent data available

CBIZ & MHM, together one of the Top Ten accounting providers in the nation, serving Kansas City since 1954

ACCOUNTING • TAX • AUDIT*
BUSINESS CONSULTING

Rick Mills • 913.234.1000



*Audit and attest services provided by Mayer Hoffman McCann P.C., an independent CPA firm.

Kansas City By The Numbers

Unemployment 8.6% ▲ Labor Force 1,041,855 ▲ Average Weekly Wage \$826 ▼ Annual Per Capita Personal Income \$39,222* ▲

Source: Bureau of Labor Statistics and Bureau of Economic Analysis ▲/▼ = Change from prior period *Most recent data available



helping your business **grow**
in a challenging **economy**



Solutions to your
Financial & Accounting
needs

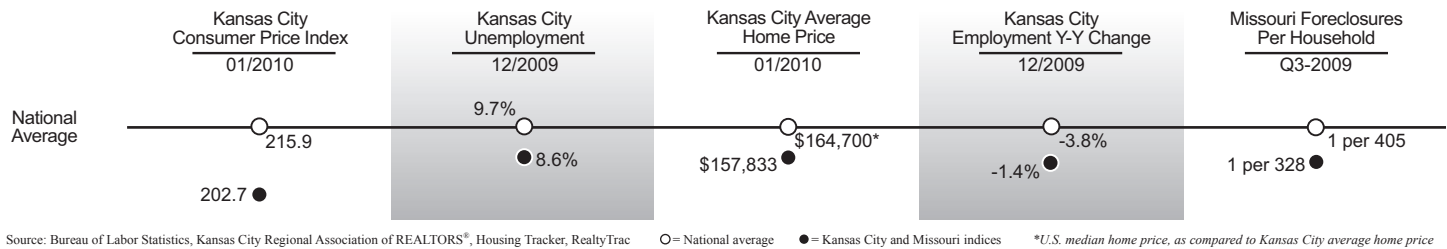


Solutions to your
Employee Benefits, HR & Payroll
needs



For a free copy of the book
19 Ways to Help Your Company Grow in a Challenging Economy
visit www.cbiz19.com.

Economic Trends



Small Business Optimism Index

Based on a Survey of Small and Independent Business Owners - Seasonally Adjusted (1986 = 100.0)

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2006	101.1	101.5	98.0	100.1	98.5	96.7	98.1	95.9	99.4	100.7	99.7	96.5
2007	98.9	98.2	97.3	96.8	97.2	96.0	97.6	96.3	97.3	96.2	94.4	94.6
2008	91.8	92.9	89.6	91.5	89.3	89.2	88.2	91.1	92.9	87.5	87.8	85.2
2009	84.1	82.6	81.0	86.8	88.9	87.8	86.5	88.6	88.8	89.1	88.3	88.0
2010	89.3											

Source: National Federation of Independent Business

CBIZ, one of the **Top Ten Benefits Specialists** in the U.S., serving Kansas City since 1962

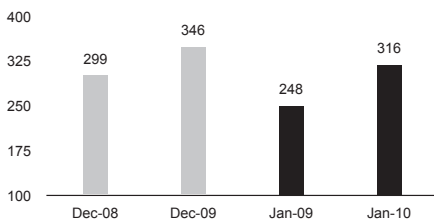
BENEFITS • HR
 PAYROLL • RISK MANAGEMENT

CBIZ
 Carolyn Watley
 913.234.1000

National Indicators

U.S. Automotive Unit Sales

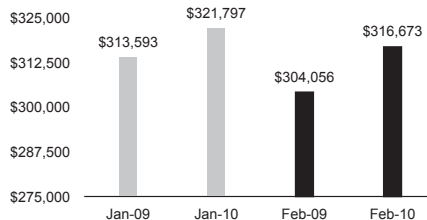
Seasonally Adjusted in Thousands (000s)



Source: U.S. Department of Commerce

Total U.S. Retail Sales

In Millions (000,000s) NSA



Source: U.S. Department of Commerce NSA = not seasonally adjusted

Single Most Important Problem Facing Small Businesses

Problem	January 2010	January 2009
Taxes	22%	19%
Inflation	3%	6%
Poor sales	31%	28%
Finance and business rates	5%	4%
Cost of labor	4%	5%
Government regs. and red tape	13%	11%
Competition from large business	7%	6%
Quality of labor	3%	6%
Cost/availability of insurance	8%	9%
Other	4%	6%

Source: National Federation of Independent Business

United States Employment Outlook

	Increase	Decrease	No Change	Don't Know	Net Employment Outlook
Q1-2010	12%	12%	73%	3%	0%
Q4-2009	12%	14%	69%	5%	-2%
Q3-2009	15%	13%	67%	5%	2%
Q2-2009	15%	14%	67%	4%	1%
Q1-2009	16%	13%	67%	5%	3%

Source: Manpower Survey Q1-2010
 Data is based on interviews with 16,000 employers, who were asked how the current employment situation will change in the next three months

Gross Domestic Product

% change from prior quarter

Q4-08	-5.4%
Q1-09	-6.4%
Q2-09	-0.7%
Q3-09	2.2%
Q4-09	5.9%

Source: Bureau of Economic Analysis

Consumer Confidence Index

1985 = 100

Oct-09	48.7
Nov-09	50.6
Dec-09	53.6
Jan-10	56.5
Feb-10 (p)	46.0

Source: The Conference Board
 (p) = preliminary

Capital Expenditure Plans

Small Businesses Planning a Capital Expenditure in Three to Six Months

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2005	34%	33%	36%	32%	33%	33%	29%	31%	31%	29%	34%	33%
2006	32%	35%	31%	33%	28%	27%	31%	28%	30%	31%	31%	26%
2007	30%	30%	33%	29%	29%	28%	27%	27%	29%	27%	27%	30%
2008	25%	26%	25%	26%	25%	26%	21%	23%	21%	19%	21%	17%
2009	19%	18%	16%	19%	20%	17%	18%	16%	18%	17%	16%	18%
2010	20%											

Source: National Federation of Independent Business