

# LUNCH BUNCH 10/4/18

<http://leads3.org/>

---

**Tuscany Tavern 10/4/18 @ 11:30 am**

## ATTENDEES

Janice Kaup - Professional Organizer, Clutterbug of Colorado

Charles Holman - Acupuncturist, Bear Creek Healing Arts

Holly Worley -Realtor, Windemere Real Estate

Lisa Marie Schwartz - Mortgage Broker, Fox Valley Mutual

Trusan Comstock - Chef, Trusan Cuisines

Gary Billings - Vice President, Evergreen National Bank

Arlene Burgess - Arbonne, Health and Wellness & Skin Care

GUEST!! Casey Claunch - Business Banking Specialist, US Bank

GUEST!! Will Traylor - Sales, Action Axiom LLC

Rosa Julian - State Farm Insurance, Nancy Straub's office

## AGENDA

- **11:25 - Leadership Committee - Confirm Roster, Bylaws and Agenda**
- **11:30 - Call to order / Recognition of Guests / Order lunch**
- **11:35 - 20-second Introductions by all (Elevator Pitch)**
- **11:45 - Attendance / Exchange Leads via Lead Forms**
- **11:55 - 10-minute long presentation / Select next presenters**
- **12:10 - Old Business / New Business / Director reports / Updates on Membership Information**
- **12:25 - Wrap up and adjourn at 12:30**

## NOTES

- Holly - complimentary property evaluations - **ASK:** JeffCo School District to offer financial ass't to teachers - who are teachers/administrators in JeffCo that you know and can refer to?
- Gary - does small and multimillion dollar mortgages and everything in between - **ASK:** more time in the day :)
- Charles - Western medicine can be more invasive than people need such as pharmaceuticals - **ASK:** refer people to him for allergies and ANY health issues
- Janice - "Make room in your life for what really matters" - **ASK:** know what I do to refer others to me, I market by forming relationships, meeting people face-to-face
- Will - part time help with sales for small business, scientific sales processes, audits for sales processes, social media presence coordination, score and value leads, "win the war with the people you have right now", Sage Advisor for start ups with a concept/idea Innosphere - **ASK:** get to know people so that they know what he does and refer him
- Arlene - vegan-based health and wellness from the inside out, getting toxins out - **ASK:** pass along Arlene's info to anyone you think could benefit from her or give her their info
- Rosa - health, life, home, auto, business insurance - **ASK:** supplementals for their high deductible health plans, or sign up for life insurance
- Casey - liaison, helps people understand , no min balance and no monthly fee, online modules for high school students - **ASK:** review CC processing - bring 2 statements payment solutions person and if they can't do it, will give \$1000
- Lisa Marie - mortgage broker, loan lady from start to finish - clients talk only to her, licensed in Texas Idaho, Wyoming, Michigan, 14 years in business - **ASK:** refer people who are turned down by banks
- Trusan - catering, in-home cooking dinner parties, food safety instructor, customer service, no set menu - is individualized - **ASK:** fill up holiday schedule with parties as well as food safety inspections for places like senior housing
- Blue Spruce Habitat for Humanity build in Evergreen Oct 18 - **need commitment from folks as to who can do this 34125 Grouse Lane 11:30am-4pm**
  - Lisa Marie

- Arlene
  - Janice
  - Sheree
  - Holly
- Power Partners - identify 5 businesses on list, send those names to Betsy Hays at the Evergreen Chamber so she can make a warm lead for you

## **ACTION ITEMS**

- 1. Quarterly Trackers - Sheree will hold them and pass them out at meetings to fill out and return to her. You get points for referrals, bringing guests, etc. At the end of the quarter, the person who has the most points, gets a \$25 gift certificate to a Chamber restaurant and at the end of the year, a \$100 gift certificate to a Chamber restaurant.**
- 2. Membership dues - \$40/year - bring check to next meeting when you get an email from Sheree**

## **NEXT WEEK'S MEETING:**

**Thursday, Oct. 18 at 11:30 am at Tuscany Tavern**