

LUNCH BUNCH 2/21/19

<http://leads3.org/>

Tuscany Tavern 2/21/19 @ 11:30 am

MEMBERS (attendees first names are in bold and underlined)

1. **Sheree Teller-Hedin** - Story Teller at Work
2. **Charles Holman** - Acupuncturist, Bear Creek Healing Arts
3. **Holly Worley** - Realtor, **Windemere** - Find A Home With Holly
4. **Bob Campbell** - President, **Incognito Solutions**
5. **Ryan Holtmann**, Architect & Licensed Contractor, **Design Studio Architects**
6. **Cindy Alvarez** - Senior Wealth Management Advisor, **Wambolt & Associates**
7. **Lisa Marie Schwartz** - Mortgage Broker, **Fox Valley Mutual**
8. **Tara Cox** - Owner/Massage Therapist, **Evergreen Massage**
9. **Suzanne Levy** - Positive Psychology Coach, **Evergreen Life & Wellness**
10. **Casey Claunch** - Business Banking Specialist, **US Bank Evergreen**
11. **Arlene Burgess** - Health and Wellness & Skin Care, **Arbonne**
12. **Russell Hammond** - Manager, **Big O Tires Evergreen**
13. **Rosa Julian** - Team Leader - **State Farm** - Nancy Staub's office
14. **Pam Pagliai** - Tax Advisor, **H&R Block Tax Advisors**
15. **Jena Fullmer for Tracy Jones** - Attorney, **Jones Law Office**
16. **Will Traylor** - Sales Management, **Action Axiom**
17. **Janice Kaup** - Professional Organizer, **Clutterbug of Colorado**
18. **Tricia Bass** - Professional Home Stager, **Tricia Bass Beautiful Spaces**
19. **Lori Milhollan** - Relocation Specialist, **Armstrong Relocation & Companies**
20. GUEST!! **Michelle** "Shelly" Brien -Owner, **Shelly Lyn Photography**
21. GUEST!! **Arden** Hauer - Friendly Divorce Services Owner, **Friendly Divorce**
22. GUEST!! **Betsy** Hays - President, **Evergreen Area Chamber of Commerce**

NOTES

- SWOT/Business Idea of the Day:
 - Feb 21 - **Cindy Alvarez**.
 - Mar 7 - **Suzanne Levy**
 - Mar 21 - **Holly Worley**

- **Networking groups to know about:**
 - [Fri Afternoon Club meetup](#)
 - [Serenity schmoozer](#) next one will be April??
 - If you're looking to expand your business contacts DTH (down the hill), here's an invitation to join Network After Work for a year for a 65% discount, only \$35. Joylyn and Schaunon have joined and look forward to learning more about what and how this group functions.
<https://www.getdrip.com/deliveries/uzipmvriqqczisbwisxy?s=j88m4zngu987vktmze>

MEMBER UPDATES

1. Sheree Teller-Hedin - ideal customer: small business with no designated person to do social media and media relations and email marketing campaigns

2. Charles Holman - ideal customer: people with chronic illnesses interested in finding a root cause

3. Holly Worley -

4. Bob Campbell - ideal customer: new companies, 20 or less employees with no IT staff

5. Ryan Holtmann -

6. Cindy Alvarez - ideal customer: who doesn't understand what they own, how they own it, where they need to be in the future

7. Lisa Marie Schwartz - idea customer: wants cash out and not do HELOCs, big turn-downs. Rates are better b/c she's wholesale

8. Tara Cox -

9. Suzanne Levy -

10. Casey Claunch - ideal customer: business owners that hate banking b/c she makes it easy

11. Arlene Burgess -

12.. Russell Hammond -

13. Rosa Julian - ideal customer: wants an insurance agent that contacts them every 12-18 months

14. Pam Pagliai -

15. Jena Fullmer/Tracy Jones - ideal customer: divorce, parenting rights, estate planning, criminal

16. Will Traylor -

17. Janice Kaup - ideal customer: people who want to declutter and is overwhelmed with stuff

18. *Tricia Bass* -

19. *Lori Milhollan* - ideal customer: anyone moving usually long distance, anyone relocating, working with employers doing billing direct, packages

GUEST - **Arden** - ideal customer: people who are working to get divorced without attorney intervention in a non-adversarial way and there is no long-term commitment to work with Arden

GUEST - **Michelle** - ideal customer: family newborn and maternity studio - on location - ideal: family portraits to put on walls or in albums

GUEST - **Betsy** - ideal customer: business that wants to be more involved in the community, become part of the Chamber. She will do one minute videos for all businesses - invite her to events for your business and she can video there!

PRESENTATION BY : [Cindy Alvarez, Wambolt & Associates](#)

- Cindy works at this small, boutique firm because she doesn't want to be accountable to corporate executives. Wambolt & Assoc. is personal, not commercial.
- Things people don't know about structuring their portfolios - 401k is best way to save b/c tax deferred savings but downside is only can invest in mutual funds.
- ETFs are super affordable - better than mutual funds. ETFs are better-performing in past 5 years.
- If you leave your employer, put your 401k into rollover IRA instead of putting into new 401k.
- Roth vs traditional - Roth makes more sense for younger people.
- Discussed bonds for risk-averse people and inflation interest rates. Income comes from bonds, master limited partnerships, etc. with no internal fees.
- What are your goals? She wants to know! Bigger companies do model portfolios that are not personalized for YOU. Comprehensive financial plan at no cost. Sliding scale fees that are aggregated by family so fees depend. Diversifying is important.
- If you have money in different types of accounts, she'll look at all accounts to make sure you're invested how you should be invested. The goal is to educate women especially.

Lunch Bunch business:

- [Share and link](#) to the video Betsy took today of Lunch Bunch - [Facebook video today](#)
- Treasurer's Report - \$40 for year dues. Make checks payable to: Lunch Bunch Leads Group of Evergreen.
- Chamber business:
 - Upcoming Chamber [events](#) with sponsorship opportunities:

- [Let's Do Lunch!](#) - every Fri @ 1:00 pm - Lunch with Betsy to talk about how EACC can better serve you. No agenda. You pay for your own lunch. Don't need to RSVP, just show up.
- [Monthly Breakfast](#) - **Mar 6** 7:30 am - 9:00 am @ El Rancho Brewing Co.
- [Honoree Celebration](#) - **Mar 7** 5:30 pm - 8:30 pm - EACC and Leadership Evergreen partner in this annual event
- [Mixer](#) - **Mar 14** 5:00 pm-7:30 pm @ Mountain Hearth & Patio
- [Policy](#) for Lunch Bunch membership (click on link)
 - In order to be a member, you have to pay dues!!
 - Trackers -
 - Giving qualified leads is the goal - see tracking sheet
 - 4th quarter - Sheree won!! Lunch Bunch & Morning Edition combined - Myra Purkey won with 176 points for the year
 - quarterly and yearly winners for the most leads, meeting with Lunch Bunch members, attending Chamber events, and business transactions.
 - Quarters are Jan-Feb-Mar, Apr-May-Jun, Jul-Aug-Sep, Oct-Nov-Dec.
 - 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.

ACTION ITEMS

Everyone's name that is in **red** has their action item listed above.

NEXT WEEK'S MEETING:

Thursday, Mar 7, 2019 @ 11:30 @ Tuscany Tavern