

# LUNCH BUNCH 5/16/19

<http://leads3.org/>

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Tuscany Tavern 5/16/19 @ 11:30 am

MEMBERS (attendees first names are in bold, underlined, italicized)

1. **Sheree Teller** - Owner, [StoryTeller 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. **Cindy Alvarez** - Senior Wealth Management Advisor, [Wambolt & Associates](#)
6. **Lisa Marie Schwartz** - Mortgage Broker, [Fox Valley Mutual](#)
7. **Tara Cox** - Owner/Massage Therapist, [Evergreen Massage](#)
8. **Suzanne Levy** - Positive Psychology Coach, [Evergreen Life & Wellness](#)
9. **Casey Claunch** - Business Banking Specialist, [US Bank Evergreen](#)
10. **Arlene Burgess** - Health and Wellness & Skin Care, [Arbonne](#)
11. **Russell Hammond** - Manager, [Big O Tires Evergreen](#)
12. **Rosa Julian** - Team Leader - [State Farm](#) - Nancy Staub's office
13. **Pam Pagliai** - Tax Advisor, [H&R Block Tax Advisors](#)
14. **Jena Fullmer/Tracy Jones** - Attorney, [Jones Law Office](#)
15. **Will Traylor** - Sales Management, [Action Axiom](#)
16. **Janice Kaup** - Professional Organizer, [Clutterbug of Colorado](#)
17. **Tricia Bass** - Professional Home Stager, [Tricia Bass Beautiful Spaces](#)
18. **Lori Milhollan** - Relocation Specialist, [Armstrong Relocation & Companies](#)
19. **Joshua Smith** - Owner, [ToMMTV Colorado](#)

GUEST! **Chuck** Adams - President, [1Up Aerial Drone Services, Inc.](#)

GUEST! **Greg** Ahern - Founder & President, [Ometrics](#)

GUEST! **Candace** O'Brien - Certified Coach & Practitioner, [Momentum Energy Coaching](#)

## NOTES

- Upcoming long presentations:
  - May 30 - **Tricia Bass**
- Networking groups to know about:

- [Alignable](#) recommendations
- [Fri Afternoon Club meetup](#)
- [Serenity schmoozer](#) **quarterly** - last one was April 17
- [Network After Work](#) if you're looking to expand your business contacts down the hill
- ***In It Together*** - new Chamber program - at the monthly breakfast, you can talk about issues/problems in a small group with a Chamber board member who's experienced with that problem can help out at another time.

## MEMBER UPDATES

**1. Sheree Teller** - Helps small to medium-sized businesses on awareness of what they do through social media mostly but also speaking engagements, media outreach, etc.

**2. Charles Holman** - Pollen season coming up - allergies - see Charles!!

**3. Holly Worley** - Helps people buy and sell real estate - newer listing in Castle Rock

**4. Bob Campbell** - Online event registration, complete web solutions, SEO, and more....

**5. Cindy Alvarez** -

**6. Lisa Marie Schwartz** - Wholesale mortgage broker - rates are better and closing costs are low, does the loan from A-Z and no one in between

**7. Tara Cox** -

**8. Suzanne Levy** -

**9. Casey Claunch** -

**10. Arlene Burgess** -

**11. Russell Hammond** -

**12. Rosa Julian** -

**13. Pam Pagliai** -

**14. Jena Fullmer/Tracy Jones** -

**15. Will Traylor** -

**16. Janice Kaup** - Clients range in all demographics and levels of disorganization

17. *Tricia Bass* -

18. *Lori Milhollan* -

19. *Josh Smith* - graphic design, digital menu, in-between food ads are commercials he builds for small businesses in 32 locations, packages starting at \$100 and 10% discount for Chamber members

*Chuck Adams* - Sells drones for anyone. Also used for land mapping, video and photography, real estate, construction reports, training development and consultation

*Greg Ahern* - Tools (surveys, feedback tabs) and consulting (chatbots - engages customers with ecommerce help, lead generation, market research)

*Candace O'Brien* - Creates a safe space for people to “unpack their bag” - she coaches the energy behind the story (weight loss, relationships, etc.)

PRESENTATION BY : [Lisa Marie Schwartz](#)

- Wholesale mortgage broker -
  - doesn't work for a bank, get prices right out of Wall Street
  - Doesn't do commercial loans and will refer out
  - Usually gets a better/lower rate
  - Title and underwriting fees are about the only fees you have on hard costs
  - Can close in as little as 10 days
- Quicken - her pricing is better than retail
- Interest rates
  - Read the fine print when it sounds really good - go to Fannie Mae - risk price adjustments - you'll find the penalties there (e.g. if you put down 40%, etc. instead of around 3%)
  - There are a lot of different situations/scenarios like debt-to-income ratio, low credit score
- Mortgage insurance
  - You can buy it out on conventional and pay a lower payment
  - USDA loan - 0% down, 640 credit score, primary home, income is <\$113,000
- Jumbo refinancing/loans:
  - 10% down, no mortgage insurance, no closing costs options, escrow optional, etc.
  - See the letter she passed around today

Lunch Bunch business:

- Treasurer's Report - \$40 for year dues. Make checks payable to: Lunch Bunch Leads Group of Evergreen.

- [Homes for our Troops](#) - Holly is looking for volunteers for home building in Pine. Sean Carroll's name is top middle - let's look into this for a community service project
- Give presentations on each other's businesses - let's discuss this further to get to know each other's businesses better and know how to talk intelligently about each other when networking
- Get speakers for Lunch Bunch for some meetings - ask past LE presenters
- [Rotary Club of Evergreen](#) has projects that we could tie into. For example, this week Tall Grass is stuffing boxes for overseas troops.
- 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](#) - **June 5** 7:30 am - 9:00 am @ El Rancho
    - [Mixer](#) - **June 13** 5:00 pm - 7:30 pm @ ReMax Alliance
    - [Thursday Mornings](#) - A 4th leads group that is starting through the Chamber
    - [Blog wars](#) - 39 people submitted blogs for this first round and traffic doubled on the Chamber website!
      - The ideal blog is one that you can walk away with information - tie it to the theme of getting people to visit Evergreen - use keywords & analogies - to recreation such as fishing, hiking, skating, etc.
    - [Taste of Evergreen](#) was great!
      - Lots of new restaurants - My Bakery Basket - Lisa this note's for you :)
    - [Lake Concerts](#) - the first one will be **June 12** - Threatles (Beatles cover band) will be opening for The Long Run (Eagles cover band)

New leads group through the Chamber -

- [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
- 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.

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

**Thursday, May 30, 2019 @ 11:30 @ Tuscany Tavern**