

# LUNCH BUNCH 10/3/19

<http://leads3.org/>

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Tuscany Tavern 10/3/19 @ 11:30 am

## MEMBERS (attendees first names are in bold and underlined)

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](#)
20. **Greg Ahern** - Founder & President, [Ometrics](#)
21. [Andrew Stevens](#) - Travel Advisor, [Expert Adventures](#)

## GUESTS!!

- ❖ Mike Coleman & Liz Merwin - [Evergreen Security and Investigations](#)

## NOTES

- Upcoming long presentations:
  - Oct 17 - [Suzanne Levy](#)
  - Today's presentation: Pam Pagliai with Meredith Mefferd
    - Why to come to Block vs CPAs?

- Open year-round
  - CPAs don't necessarily specialize in tax
  - Products Block Advisors give away or include in their services: changes like marriage, death, inheritance
  - One important product - scans tax id with the black market/dark web to make sure your identity isn't being used illegally
  - Restoration agent - help to restore identity
  - Refund transfer and refund advance - 2 ways to pay tax prep fee: Transfer is when they withhold the tax prep fee from the refund. Advance is when you get your refund in Jan or early Feb at 0%.
  - Second look - will look at your taxes for free even if you have already done them or a CPA did it. This is a double-check. Many times Block Advisors end up finding deductions that people overlooked doing TurboTax. You get all Block guarantees if there are no changes to be found in the double-check.
  - Audits - can do a few hours for free but if it goes in-depth and more hours of work, will charge \$50/hour.
- Block Advisors Peace of Mind
    - \$49.95
    - Correcting errors for free, reimburse tax liability, pay penalties and interest, handle everything from beginning to end like talking with IRS, etc.
  - Promote Lunch Bunch businesses to Block clients
    - They recommend other local businesses
    - Their clients trust them
    - Put your business card in their office & get referrals - ask Pam!
  - Fees of Block Advisors vs CPAs
    - Block Advisors charge by form and CPAs charge by the minute/hour
    - Up front pricing (not always exact) but can give a ballpark until they know more details
    - Fee covers everything for the whole year

- Proactive - tax planning, capital gain impact on investment properties, IRAs and 401ks tax credits, worksheet to know what the max is to contribute to your retirement plan
- Community service
  - Non profits that pair with them - non profit gets \$20 off
  - Local influencers that they pair with - mortgage brokers, realtors, etc. - those businesses get free returns and give coupons to clients
- Networking groups to know about:
  - [Alignable](#) recommendations
  - [Fri Afternoon Club meetup](#)
  - [Serenity Schmoover](#) - look on Facebook for the upcoming one in Oct
  - [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.
- ★ The [Jefferson County BRC](#) has many [programs](#) and [resources](#) to help you with your business.

## MEMBER UPDATES

1. *Sheree Teller* - every business has a story worth telling in an informative and compelling way.

2. *Charles Holman* -

3. *Holly Worley* - market conditions - single family homes on the market in Denver (incl 5 counties) compared to last month are down but compared to last year they are up. Condos on the market are up from last year. Sold homes and condos compared to last month and last year are down.

4. *Bob Campbell* - online event registration and e-commerce membership systems.

5. *Cindy Alvarez* - Wambolt is a registered independent firm, different from Wells Fargo, Merrill Lynch (big firms) in that they can give a more personalized approach and not have a bunch of rules like bigger firms have. No minimums so everyone is treated the same. Core of what they do is financial planning.

6. *Lisa Marie Schwartz* - rates are almost always lower than the banks and there are no third party fees. Product in the mountains is USDA (no PMI, no money down, like a VA loan without being a veteran) If you know of anyone is comparing and looking, think of her.

7. *Tara Cox* -

8. *Suzanne Levy* -

9. *Casey Claunch* - business banking specialist but soon transitioning into the credit side as an analyst. Tammy Carroll, Evergreen Branch Mgr. , attended with Casey and just celebrated 19 years with the bank.

10. *Arlene Burgess* -

11. *Russell Hammond* -

12. *Rosa Julian* - with Nancy Staub's office and gets lots of referrals from Lisa Marie!

13. *Pam Pagliai* - manages Block Advisor offices, they do more complex tax returns but also do more "vanilla" regular taxes. Meredith Mefferd is a Tax Advisor that attended with Pam.

14. *Jena Fullmer/Tracy Jones* -

15. *Will Traylor* -

16. *Janice Kaup* - if you know of anyone who needs Professional Organizing in the mountain area, think of me.

17. *Tricia Bass* -

18. *Lori Milhollan* - largest moving company. Just moved a client of Holly's. She specializes in long distance moves. She would like help with LinkedIn profile.

19. *Josh Smith* - graphic design and builds commercials - very eye-catching! Great way to reach thousands of people each month. Some Evergreen restaurants are Cactus Jack's, Wild Game, El Rancho, Casa Tequila's, Rocky Mountain High. Evergreen Brewery coming soon. Lots in Denver as well!

20. *Greg Ahern* - tools like AI chatbots and pop-ups. He is looking for companies that have e-commerce sites.

21. *Andrew Stevens* -

**GUESTS!!** *Mike Coleman & Liz Merwin* - assist clients in protecting their assets. Opening new field. Officers are military or ex-law enforcement. They offer self defense courses with non lethal moves. See handout.

Lunch Bunch business:

- Text messaging - DON'T reply to these messages. They are informational only to inform members of events, meetings, things to know, requests from other members, etc.
- If you want to send a text message to all members of Lunch Bunch:
  - Go to [our website](#)
  - You're on the Members tab

- Click link that says “Send SMS msg to Everyone”
  - Sheree suggested ideas surrounding “2020 vision” - everyone be thinking about this theme for the new year
  - Let’s work on our exposure more. Suggestions:
    - Fun event like bowling or BBQ and post on social media - Holly & Janice
    - Getting personal - in addition to SWOT - things you might not know about each other
    - Canned good and happy bucks like at Rotary
  - Treasurer’s Report - \$40 for year dues. Make checks payable to: Lunch Bunch Leads Group of Evergreen.
  - 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
  - Pam - Block Advisor open house in Oct or Nov - would like representatives from LB to hand out business cards and info - **great networking opportunity!! Thanks, Pam!!!**
- Chamber business:
  - Upcoming Chamber [events](#) with **sponsorship opportunities**:
    - [Mixer](#) - **Oct 10** 5:00 pm-7:30 pm @ Roofing Outfitters and The Andersen Group/ReMax Alliance
    - [Marketing event](#) - **TODAY Oct 3 & Oct 17** 1:00 pm - 4:00 pm @ Jeffco Business Resource Center
    - [Monthly Breakfast](#) - **Nov 6** 7:30 am - 9:00 am @ El Rancho
- [Policy](#) for Lunch Bunch membership
  - 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, Oct 17, 2019 @ 11:30 @ Tuscany Tavern**