

# LUNCH BUNCH 10/31/19

<http://leads3.org/>

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Wild Game 10/31/19 @ 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. **Tammy Carroll** - Assistant VP/Branch Manager, [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](#)

## GUEST!!

- ❖ **Mindy Lawnicki** - Registered Dietician, private practice and Senior Resource Center

## NOTES

- Upcoming long presentations:
  - Nov 14 - Bob Campbell
  - Presentation today by Cindy Alvarez
    - Discussed community housing issue in her neighborhood

- Cindy will send out info to the group on this issue

- Networking groups to know about:

- [Alignable](#) recommendations
- [Fri Afternoon Club meetup](#)
- [Serenity Schmoozer](#) - look on Facebook for postings on what appears to be a monthly event
- [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** - social media marketing for small businesses

**2. Charles Holman** - for the month of Nov Charles is running a special for \$50 off for new patients and \$25 for existing patients for those who bring in a coupon. With technology today, we can use lasers pain-free. Charles works with kids with allergies, women with hormonal issues, etc.

**3. Holly Worley** - specialize in buying and selling real estate. She makes a smooth and successful transition in buying and selling.

**4. Bob Campbell** -

**5. Cindy Alvarez** - financial planning and wealth management. Works with people where they are and how to get to their next goal in life. Tax planning to be tax efficient such as an IRA/Roth Conversion to go tax-free for the rest of your life.

**6. Lisa Marie Schwartz** - Does jumbos, gov't loans, and others. Interest rates just dropped - call Lisa Marie!

**7. Tara Cox** - 6 therapists and focus on therapeutic massage. Open 7 days a week by appointment only and walk-ins are not guaranteed.

**8. Suzanne Levy** - Board Certified Health and Wellness Coach. Womens' group from 4-5pm on Mondays that has openings. She is working with a company to work with *their* clients - employees who need coaching on life issues - to look at the whole person (home, work, recreation) and how to bring your best self to all those aspects of life.

9. *Tammy Carroll* - full range of products for businesses and consumers. If you have CC debt - platinum card - transfer balances from other cards for 15 months at 0%

10. *Arlene Burgess* -

11. *Russell Hammond* -

12. *Rosa Julian* -

13. *Pam Pagliai* -

14. *Jena Fullmer/Tracy Jones* -

15. *Will Traylor* -

16. *Janice Kaup* - helping people make room in their lives for what really matters. Mentoring another budding Professional Organizer and having fun being cooperative instead of competitive with other POs.

17. *Tricia Bass* - Holly has referred Tricia several times for re-design and staging. Is also an oil painter.

18. *Lori Milhollan* -

19. *Josh Smith* -

20. *Greg Ahern* - conversion optimization (analysis on what is actually working) - tools like chatbot, consulting, \$500 service as well as other, less expensive, services.

21. *Andrew Stevens* - luxury travel advisor. Does consulting with folks to work out their travel dreams - he was dressed at Steve Erwin today for Halloween!!

**GUEST! Mindy Lawnicki** - Dietician for Senior Resource Center - go back to basics with diet, organics, protein for older folks. Her clients consist of people who need weight loss, have hypertension, have high cholesterol.

Lunch Bunch business:

- **DATE CHANGES:** Our upcoming meetings will be Nov 14, Dec 5 and Dec 19. Bob, please update our website with the new dates.
- ***Nov 7th Happy Hour at Cindy's house!!*** Please RSVP to Cindy with your availability and what you can bring - a light appetizer or other food..
- ***Dec Happy Hour at Charles' house!!*** Look for upcoming emails on this. Everyone look at your schedule to throw out any dates.
- CHANGE OF VENUE?? Discussion around changing the venue (Tuscany Tavern) that we have meetings for Lunch Bunch.

- Ideas were thrown out and Sheree, Cindy, Suzanne and Holly will check out some other restaurants.
    - Issues to think about - RSVPs for the meeting so restaurant knows how many to expect, separate checks, tell wait staff if leaving early
  - Let's work on our exposure more. Suggestions:
    - Post on social media - events, especially important meeting info
    - Canned good and happy bucks like at Rotary:
 

We will call this our "happy thought donations" and you will have the floor for roughly 30-60 seconds when donating your food item. Cindy will collect canned goods during every Lunch Bunch meeting and take them over to Echo. This allows us to get more personal with one another and start building deeper bonds and relationships.
  - Treasurer's Report - \$40 for year dues. Make checks payable to: Lunch Bunch Leads Group of Evergreen. Sheree will give those who owe an invoice.
  - Talk about Treasurer and Secretary positions next meeting
- Chamber business:
  - Upcoming Chamber [events](#) with **sponsorship opportunities**:
    - [Business Expo Mixer](#) - **Nov 13\*** 5:00 pm -7:30 pm @ Evergreen Elks Lodge - *there is a table for Lunch Bunch. Please bring your brochures, business cards and other materials to display.*
      - *\*Note Special Date - This is a Wednesday\**
    - [Monthly Breakfast](#) - **Nov 6** 7:30 am - 9:00 am @ El Rancho
    - [In It Together](#) - at the end of the Monthly Breakfast - break out into small groups to talk about things going on in their businesses and usually a board member will be in those small groups
    - [Santa breakfast](#) on Nov 30 is SOLD OUT
    - Chamber Board has working goals for next year so that Chamber members see the value of being a member - committees tasked to work on strategic visions, fiduciary, etc. to get

specific on how to help businesses achieve their goals as well as reaching out to key community leaders.

- [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, Nov 14, 2019 @ 11:30 @ Tuscany Tavern**