

# LUNCH BUNCH 2/6/20

<http://leads3.org/>

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Tuscany Tavern 2/6/20 @ 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. [Russell](#) Hammond - Manager, [Big O Tires Evergreen](#)
11. [Rosa](#) Julian - Team Leader - [State Farm](#) - Nancy Staub's office
12. [Pam](#) Pagliai - Tax Advisor, [H&R Block Tax Advisors](#)
13. [Janice](#) Kaup - Professional Organizer, [Clutterbug of Colorado](#)
14. [Tricia](#) Bass - Professional Home Stager, [Tricia Bass Beautiful Spaces](#)
15. [Lori](#) Milhollan - Relocation Specialist, [Armstrong Relocation & Companies](#)
16. [Joshua](#) Smith - Owner, [ToMMTV Colorado](#)
17. [Greg](#) Ahern - Founder & President, [Ometrics](#)
18. [Daniel](#) Battersby/([Dr. Amber](#)) - Practice Administrator, [The Golden Stethoscope](#)
19. **Will** Traylor - President, [Action Axiom](#)

GUEST! [Penny Randell](#) - Journalist, Author, Speaker, [PennyRandell.com](#)

GUEST! [Mary Pat DeWald](#) - VP, Board of Directors, [Vital Hearts](#)

GUEST! [John Hugger](#) - Attorney, [Evergreen Lawyer](#)

## NOTES

- Upcoming long presentations: **Josh Smith on 2/20/20**
  - **Holly will lead the group on 2/20/20**
- **Today's presentation:** [Lori Mihollan](#) was not present
  - **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
- The [Jefferson County BRC](#) has many [programs](#) and [resources](#) to help you with your business.

## MEMBER UPDATES

*1. Sheree Teller* - communications and marketing techniques, brand awareness and engagement

*2. Charles Holman* - general practitioner. Works on getting people off of pharmaceuticals which can be a band aid but not meant to be long term. Men's clinics are becoming popular in giving testosterone shots which can have terrible side effects. BP, thyroid, sleep, etc. medicines are not good to take long-term. Charles uses applied kinesiology.

*3. Holly Worley* -

*4. Bob Campbell* - website design, membership systems, ecommerce - Wilmot job - Tara and Janice will give recommendations to the PTA President

*5. Cindy Alvarez* - satellite office in Evergreen, main office in Littleton. Does a lot of proactive tax planning as well as identify tax savings for clients, full financial planning, investment planning, small business services, solo 401k tax deferred retirement acct. Will talk more on Secure Act - changes re: taxes on retirement accts.

*6. Lisa Marie Schwartz* -

*7. Tara Cox* - across from Cactus Jack's - 3 treatment rooms focusing on therapeutic massage - 10% off in Feb (Feb Love event - people give gift certificates for Valentine's Day so they are promoting wellness and love.)

*8. Suzanne Levy* -

*9. Tammy Carroll* -

*10. Russell Hammond* -

*11. Rosa Julian* -

*12. Pam Pagliai* -

*13. Janice Kaup* - to cut down on waste, stay productive and utilize technology to its potential, upload anything to [CamScanner](#) - one of my FAVORITE apps!

*14. Tricia Bass* - home redesign - help people get their homes camera-ready and buyer-friendly. At the end of March she will be working for Landed in Denver that helps schoolteachers find the best affordable home loan. Landed hired her for teacher's lounge makeover in inner city Denver school.

*15. Lori Milhollan* -

16. *Josh Smith* -

17. *Greg Ahern* - conversion acquisition (testing to figure out what's wrong with the site), consulting. Live chat will happen soon in which a customer is talking to the chatbot and a live person can jump in. Looking for clients who have ecommerce sites - 15%-30% higher revenue when potential customers engage with chatbot on your website.

18. *Daniel Battersby* -

19. *Will Traylor* - If an organization can't afford a good manager, he can provide bookkeeping services at a fraction of the cost you would normally pay.

**GUEST! Penny Randell** - Currently writes for Canyon Courier, Mountain Connection and a new Evergreen publication. Does bios, reporting on community issues. Wrote a book called [Becoming African](#).

**GUEST! Mary Pat Dewald** - Vital Hearts is a 501(c)3 - does resilience training in vicarious trauma for those who care for others. Local, national, international training re: burnout and compassion fatigue. Caretakers need to care for themselves while caring for others - RNs, social workers, directors of hospitals, those who help people with cancer, lawyers, acupuncturists, physicians, elder care employees like @ Elk Run, LifeCare, Mt. Evans. Wants to bring students to next meeting which is fine with the group.

**GUEST! John Hugger** - Attorney - free initial 30 minute consultation to avoid the 'attorney part' of his practice. His office is a small house behind Tap House on the frontage road of Evergreen Pkwy.

- Lunch Bunch business:
  - **Marketing** - everyone needs to give a few sentences on your business to Bob to put on LB website
  - **Schedule** - is on the website - Josh Smith does presentation next time - you have to get a sub if you can't make it to the meeting
  - **Canned goods** - (like Happy Bucks that [Mountain Foothills Rotary](#) does) bring a canned good so you have the floor for 30 seconds to talk about something personal that you are happy about and Cindy will donate the food to EChO Food Bank.
  - **Treasurer's Report** -
    - \$41.50/year dues if paying through leads3.org.
    - \$40.00/year dues if paying by check.
    - Make checks payable to: Lunch Bunch Leads Group of Evergreen. Sheree emailed invoices in Dec and Holly passed around invoices on 1/23/20.
- Chamber business:
  - Upcoming Chamber [events](#) with [sponsorship opportunities](#):
    - [Breakfast](#) - Mar 4

- [Mixer](#) - Feb 13
- [Speed Networking](#) - Feb 20
- [Honoree Celebration](#) - Mar 5
- **Tara** is new Chamber Board member!!
- Task forces - **SHOP CHAMBER** - to provide tangible value to Chamber members
- **Young leadership committee** - create ideas to get younger members
- **Breakfast** yesterday was awesome with great speakers about wildfires
- [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.
    - [\*\*New Tracker system - new transparent and interactive flipboard - purpose of the group is to give each other leads\*\*](#)

## NEXT MEETING:

Thursday, Feb 20, 2020 @ 11:30 @ Tuscany Tavern