

2021 Tampa Bay ISCEBS Board Monthly Call: March

Date: March 4, 2021

Time: 9:00am – 9:45am

Attendees: Jennifer Chartrand, Anthony Donatelli, Scot Grooms, Steve Hall, Paula Krupa, Dave Lohrey, Michelle Padgett, Rebecca Witherow

Purpose: Monthly Chapter Board call

Discussion topics:

Membership outreach -- new grads and past members

- Jennifer, Anthony and Steve making progress and using the email template from the Society to begin an initial general email outreach in the next week or two.
- Related to Fundamentals planning, we can reach out to these folks with survey to gauge interest and timing.
- For Scot, Michelle, Dave and Rebecca, review Paula's Feb 4 email for past year members to see if we can pull some of these folks back in for 2021 membership.

Webinar Coalition – updates via email from Tracy

- Coalition created a LinkedIn page to help streamline communications with all chapters nationwide. Click and follow! <https://www.linkedin.com/company/cebs-cwc/>

Educational Programs/Schedule

- Panel discussion late April:
 - focuses on retirement plans – fiduciaries roles and financial wellness (ties into April financial literacy month).
 - brief legislative update in beginning
 - provide panelist candidates via email and their availability.
- Board in agreement to continue with panel discussions every 3 months or so.

Fundamentals Program

- Discussed an in-person program and timing shifting towards January or February of 2022.
- Agreed two days vs one preferred and lengthy break time in between sessions.
- Content start – Mercer-based deck Dave shared last year that has most of the pieces for the welfare side, so we are looking for similar 101 education deck on retirement plans.

Miscellaneous

- Anthony to inquire with the state (“best government money could buy”) about CE qualification for CEBS (leftover from Feb mtg).
- Dave and Scot visited Regions March 3 and getting Dave set up for Treasurer role.