

2021 Tampa Bay ISCEBS Board Monthly Call: April

Date: April 1, 2021

Time: 9:00am – 9:40am

Attendees: Jennifer Chartrand, Anthony Donatelli, Tracy Fennell, Scot Grooms, Steve Hall, Paula Krupa, Rebecca Witherow

Purpose: Monthly Chapter Board call

Discussion topics:

March minutes official approved.

Webinar Coalition

- In connection with changing the outsourced technology to host the coalition webinars, the chapter change to participate will increase from \$150 to \$257; it was approved for the TB chapter to continue to participate.
- (from previous month as reminder) 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 April 28 or 29 from 11:45am to 1pm:
 - focuses on retirement plans – fiduciaries roles and financial wellness (ties into April financial literacy month).
 - brief legislative update in beginning
 - Panelist candidates:
 - Bradley D. Gayheart, Managing Director, Sarasota Private Trust Company
 - Sean Orick, Partner for Retirement Partner Advisors
 - Anthony to seek for additional panelist
 - Next step will be to create an email and share w/ Society for distributions

Financial Update

- Scot confirmed current bank balance is \$11,200.50
- Dave and Scot still working on getting Dave access to Regions account.