

National Association of Benefits and Insurance Professionals - Northern Nevada

Board of Directors Meeting Minutes
March 7th, 2023 11:06 AM – 12:33 PM
329 Flint Street, Reno, NV 89501
Via Zoom – Meeting ID = 775 560 7006 Passcode = 652166

Attendance: Don Goldmann, Jason Casey, Aliana Rushing, Joy Gardner, Mika Clauson, Mike Dillon

Virtual Attendance: Julie Ann Evans, Gina Epsinal-Aguerre, Jaudaun Eldridge

Absent: Cambria Williams, Ken LaRovere

Guest: Molly Moreno

1. Virtual zoom meeting was called to order by President Mike Dillon at 11:06 AM.
2. Roll call of attendees was taken verbally for those attending virtually by Secretary Aliana Rushing. Quorum confirmed. Connectivity confirmed.
3. Review of board minutes by Secretary Aliana Rushing.
 - a. A motion to approve the February 2023 board minutes was made by Don Goldmann and seconded by Aliana Rushing. Unanimously approved.
4. Report of the President by Mike Dillon
 - a. Scott Kipper is the new Nevada Division of Insurance Commissioner.
5. Report of the Secretary by Aliana Rushing - None
6. Report of the Vice President by Jaudaun Eldridge
 - a. Nothing has been done.
7. Report of the Vice President of Finance by Joy Gardner
 - a. See emailed report
 - b. Metallic Sponsorship update:
 - I. UHC - Silver \$2,500
 - II. Alignment - Silver \$2,500
 - III. Hometown Health - Silver \$2,500
 - IV. Aetna - Gold \$3,500
 - V. Anthem - Diamond \$7,500
 - VI. Word and Brown - Silver \$2,500
 - VII. Prominence - Silver \$2,500
 - c. Motion made to accept the February 2023 financial report made by Aliana Rushing, seconded by Don Goldman. Unanimously approved.
8. Report of the Past President by Jason Casey

- a. Outsourcing for StarChapter has been boiled down to a company called Jaffy. Jaffy's focus is Starchapter management. Several other chapters use them, and they also manage capitol conference. Pricing is \$60,000 per year. The state chapter is only willing to put in around \$500 per month. The remainder would be split amongst NABIP- NN and NABIP - SN. The goal is to find a sponsor to fund a large portion of these fees. Jaffy will help with event organization, securing venues, social media management, meeting advertisements, etc.
 - b. Extensive discussion was held about how Jaffy would be affordable to the chapter.
 - c. A motion was made to create an Ad Hoc committee for an executive director contract with Joy Gardner as the appointed committee head by Don Goldmann, Seconded by Aliana Rushing. Unanimously Approved.
9. Committee Reports
- a. Medicare Committee Report by Jaudaun Eldridge
 - I. Extensive discussion was held regarding the lack of planning for the annual exposition. The BOD decided that the expo and Medicare summit can be combined into a two-day event like was done in 2021. Discussion was held regarding separate days dedicated to product type, or combining and mixing all lines of products. It was decided that the event will take place the week of September 11th, pending Atlantis availability.
 - b. Vice President of Legislative Affairs report by Jason Casey
 - I. Day on the hill will be on April 5th and 6th.
 - II. See emailed report in addendum
 - c. Vice President of Awards Report by Don Goldmann
 - I. DropBox files have been opened and the loading of documentation is progressing on schedule.
 - II. PaceSetter points are projected to be pretty competitive with other likely chapter's submissions.
 - III. Documentation by an email is needed for who attended the Cap Conference Leadership program.
 - IV. Documentation by an email is needed for NABIP officer training for the President, Vice President, Programs Chair and HUPAC Chair.
 - V. Work is starting in an attempt to submit for a website award.
 - VI. Work is starting in an attempt to submit for a professional development award.
 - VII. Motion made that the annual membership meeting will be held on May 10th at the monthly luncheon made by Don Goldmann.
Seconded by Aliana Rushing
 - d. Vice President of Membership Report by Gina Espinal-Aguerre

- I. Membership count is at 94 members. There are two that will be added once Cambria William's membership renewal goes through, along with a new one that Gina was able to secure.
- II. Membership orientation meetings are continuing on the fourth Thursday of the month via Zoom. So far, not many have attended.
- III. It was encouraged that the board completes all the operation shout outs that are sent out by NABIP.
- IV. Promotion of the Triple Crown Award criteria includes a member recruiting two or more members, sending out three or more Operations Shouts and contributing to NABIP Pac \$150 or be on an automatic draft of \$12 for 12 months.
 - 1. Julie Ann Evans, and Joy Gardner, only need to recruit one more member to qualify this award's year.
- e. Vice President of Communications/Media Report by Mika Clauson
 - I. Discussion was held regarding what the speaker line up will be for the May 10th Luncheon.
 - II. Discussion was held regarding the StarChapter website redesign.
 - 1. Motion to pay Starchapter \$799 to redesign the website to the NABIP layout made by Jason Casey, seconded by Aliana Rushing. Unanimously approved.
 - III. Mika will purchase the new domain names through GoDaddy and will work with Joy Gardner to get the payment done on it.
- f. Vice President of Professional Development Report by Julie Ann Evans
 - I. Monthly Luncheons
 - 1. April 12, 2023 - Previously, Ryan High with SSHIX was to present a post open enrollment update and Nick Stosic with the NV DOI to present an annual update, insurance regulations, changes, etc.; however, due to the changes at the NV DOI, Commissioner Scott Kipper, will be the speaker, and possibly Justin Worthington.
 - 2. Speaker bios and headshots will be provided to Mika Clauson shortly so that the event can be advertised.
 - 3. May 10, 2023 - The goal is to secure someone to present on disability insurance, as May is Disability Insurance Awareness Month. This would be an alternative to the Expo, just in case.
 - II. CE Submission Process
 - 1. As a reminder, if there are going to be CE courses offered at the Expo in May, all necessary requirements need to be submitted by no later than March 10, 2023, to comply with filing requirements.
 - III. Membership Survey

1. There is discussion about/planning to survey our membership to solicit topics and speakers for upcoming monthly luncheons, fun events, etc.
- g. Programs Chairperson Report by Ken LaRovere - absent
 - I. There was a great presentation made by Joy Gardner regarding LPRT at the February 15th monthly luncheon.
 - II. There was a great presentation made by Aliana Rushing regarding DEI at the February 15th luncheon.
 - III. There will be a presentation at the March 8th Luncheon for the Educational Foundation given by Julie Ann Evans, and for Vanguard by Gina Espinol-Aguirre.
- h. HUPAC Chairperson Report by Cambria Williams - absent
 - I. See addendum
- i. Bylaws and P&P Committee Chairperson Report by Donald Goldmann
 - I. A motion was made to approve bylaw changes that were made and for them to be sent to the membership for approval at the annual meeting by Aliana Rushing, seconded by Jason Casey. Unanimously approved.
- j. Nominations Committee Chairperson Report by Donald Goldmann
 - I. All positions are confirmed for the officer elections, except for the Vice President of Awards. Some advertisement of the open position will be sent out to the membership by Mika Clauson.
10. Motion made to accept all reports in toto by Aliana Rushing, seconded by Don Goldmann. Unanimously approved.
11. Old Business - None
12. New Business
 - a. Suggestion was made to also purchase the domain NAPIB just in case for misspelling for those newly adjusting to the new name. BOD decided not to do that.
13. A motion to adjourn was made by Mike Dillon and seconded by Aliana Rushing. Unanimously approved.
14. Mike Dillon adjourned the meeting at 12:33 PM.

Submitted by Aliana Rushing, NABIP - Northern Nevada Secretary

Addendum

A	B	C	D	E	F	G	H	I	J	K
ID	Name	Giving Level	2023	2022	Last Amount	Last Date	Chapter	E-mail	Region	Phone Number
351855	Gardner, Joy	Gold	\$50.00	\$714.00	\$50.00	1/24/23	NVNORTHERN	joykgardner@gmail.com	RVIII	(775) 345-3626
353011	Clark, Valerie	Capitol Club Platinum	\$85.00	\$680.00	\$85.00	1/17/23	NVNORTHERN	valerie@clarkandassoc.com	RVIII	(775) 828-7420
420093	Daidone, Grace	Bronze	\$30.00	\$360.00	\$30.00	1/14/23	NVNORTHERN	gDaidone@aandhins.com	RVIII	(775) 300-3884
344025	Dillon, Michael	Capitol Club Double Diamond	\$365.00	\$3,725.00	\$365.00	1/10/23	NVNORTHERN	mdillon@dillonhealth.com	RVIII	(775) 560-7006
497074	Eldridge, Jaudaun	Silver	\$42.00	\$504.00	\$42.00	1/8/23	NVNORTHERN	jaudaun@eldridgeagency.com	RVIII	(775) 328-1197
414381	Furr, Kenneth	Bronze	\$0.00	\$330.00	\$30.00	10/28/22	NVNORTHERN	gfurr@menath.com	RVIII	(775) 473-4101
494045	Espinal-Aguerre, Gina	Bronze	\$0.00	\$365.00	\$365.00	6/26/22	NVNORTHERN	ginaeaguere@gmail.com	RVIII	(775) 829-1221
495856	Kilcourse, Brendan	Member	\$0.00	\$60.00	\$12.00	5/13/22	NVNORTHERN	Brendan.Kilcourse@hometownhe	RVIII	
428198	Ware, Aaron	Bronze	\$0.00	\$150.00	\$30.00	5/5/22	NVNORTHERN	aaron@awarehealthinsurance.co	RVIII	(775) 432-7559
319504	Goldmann, Donald	Capitol Club Triple Diamond	\$0.00	\$5,000.00	\$5,000.00	3/1/22	NVNORTHERN	dongoldmann@yahoo.com	RVIII	(714) 900-0594
418990	Casey, Jason	None	\$0.00	\$150.00	\$150.00	3/1/22	NVNORTHERN	jason@seniorinsuranceagency.co	RVIII	(775) 829-9600
387175	Clauson, Mika	Member	\$0.00	\$150.00	\$150.00	2/17/22	NVNORTHERN	mclauson@onedigital.com	RVIII	(408) 395-3303
497143	Rushing, Aliana	None	\$0.00	\$0.00	\$12.00	5/12/21	NVNORTHERN	aliana@robberushing.com	RVIII	(775) 829-9600
494379	Moreno, Molly	None	\$0.00	\$0.00	\$12.00	11/12/20	NVNORTHERN	mmoreno@ahcusa.com	RVIII	(775) 481-5108
498279	Tevini, Andrea	None	\$0.00	\$0.00	\$150.00	9/24/20	NVNORTHERN	andrea@annadelins.com	RVIII	(775) 440-6773
428811	Davidson, Pamela	None	\$0.00	\$0.00	\$12.00	2/2/20	NVNORTHERN		RVIII	(775) 221-9043
ID	Name	Giving Level	2023	2022	Last Amount	Last Date	Chapter	E-mail	Region	Phone Number
ADMIN FUND DONORS										
356798	Evans, Julie Ann	Supporter	\$0.00	\$150.00	\$150.00	12/31/22	NVNORTHERN	julieann@jewelsbenefits.com	RVIII	(775) 883-6052
467489	Curtis, Kevin	Silver	\$0.00	\$378.00	\$42.00	9/27/22	NVNORTHERN	kevin_curtis@us.afac.com	RVIII	(775) 824-9900
319504	Goldmann, Donald	Capitol Club Triple Diamond	\$0.00	\$1,150.00	\$1,000.00	6/28/22	NVNORTHERN	dongoldmann@yahoo.com	RVIII	(714) 900-0594



NABIP-NN VP of Legislative Affairs Report March, 2023

- Capital Conference ended on March 1 with a lot of success in speakers and attendance. Those who did attend always report a great time.
 - Northern Nevada met with Congressman Mark Amodei and was able to bend his ear regarding possible upcoming bills on a total of 14 different issues.
 - Senators Cortez-Masto and Rosen held their first Silver State Breakfast since the beginning of Covid while we were there. A number of us from Nevada attended, spoke with, and had our pictures taken with the Senators. Later that same day, a number from the Nevada delegation met with the staff for both Senators.
- Nevada Legislator is in full right now with a total of 1094 BDR's submitted and a total of 495 bills open for discussion as of today.
 - March 20 is the last date to submit bills except those given special status
- The NABIP-NV Legislative Committee have so far been identified as possible interest for our group.
 - 1. A couple bills that have been released to pay attention to
 - 1. SB30- Revises provisions relating to associations of self-insured public or private employers.
 - 2. SB57- DOI Omnibus bill
 - 3. AB127-Medicare Supplement Birthday Rule Commission Fix
 - 4. AB85- Establishes procedures to fix rates for certain health care goods and services
 - 5. AB155- Potential mandate that could effect LTC or Life insurance
 - 6. SB4- HHS wants to expand the SPAP to non-medicare recipients- Biomarker Testing
 - 7. SB134- vision insurance network fix
- The NABIP-NV Day on the Hill is set for April 5th and 6th
 - Day 1- We meet in Carson City with those from the Southern Nevada Chapter along with NAIFA and The Big I
 - So far the agenda is
 - Policy Briefing
 - Sit down with the DOI commissioner and staff
 - Meet with SSHIX at their offices
 - Evening has a Meet and Greet with NHL
 - Day 2- Meet with legislators

Northern Nevada Association of Health Underwriters

NNAHU CHECKING, Period Ending 02/28/2023

RECONCILIATION REPORT

Reconciled on: 03/04/2023

Reconciled by: Dawn Hamm

Any changes made to transactions after this date aren't included in this report.

Summary	USD
Statement beginning balance	64,699.68
Checks and payments cleared (8)	-3,371.78
Deposits and other credits cleared (15)	10,942.36
Statement ending balance	72,270.26
Register balance as of 02/28/2023	72,270.26
Cleared transactions after 02/28/2023	0.00
Uncleared transactions after 02/28/2023	-79.15
Register balance as of 03/04/2023	72,191.11

Details

Checks and payments cleared (8)

DATE	TYPE	REF NO.	PAYEE	AMOUNT (USD)
02/02/2023	Expense		Authnet Gateway Billing	-15.45
02/02/2023	Expense		Star Chapter LLC	-100.00
02/02/2023	Expense		Nevada State AHU	-1,150.00
02/03/2023	Expense		Intuit	-68.00
02/03/2023	Expense		Wells Fargo	-420.55
02/24/2023	Expense		Atlantis Casino	-1,432.65
02/28/2023	Expense			-15.00
02/28/2023	Expense			-170.13
Total				-3,371.78

Deposits and other credits cleared (15)

DATE	TYPE	REF NO.	PAYEE	AMOUNT (USD)
02/01/2023	Deposit		NAHU	93.68
02/01/2023	Receive Payment		United Healthcare UHC	3,500.00
02/07/2023	Deposit		Aetna - Anna	1,750.00
02/08/2023	Deposit			1,810.00
02/09/2023	Deposit		Aetna - Anna	150.00
02/13/2023	Deposit		Aetna - Anna	30.00
02/13/2023	Deposit		Aetna - Anna	65.00
02/15/2023	Receive Payment		Alignment Health	2,900.00
02/15/2023	Deposit			135.00
02/16/2023	Deposit			115.00
02/23/2023	Deposit			35.00
02/24/2023	Deposit			175.00
02/27/2023	Deposit			70.00
02/28/2023	Deposit		NAHU	68.68
02/28/2023	Deposit			45.00
Total				10,942.36

Additional Information

Uncleared checks and payments after 02/28/2023

DATE	TYPE	REF NO.	PAYEE	AMOUNT (USD)
03/02/2023	Expense		Authnet Gateway Billing	-14.15
03/02/2023	Expense		Star Chapter LLC	-100.00
Total				-114.15

Uncleared deposits and other credits after 02/28/2023

DATE	TYPE	REF NO.	PAYEE	AMOUNT (USD)
03/02/2023	Deposit			35.00
Total				35.00

Northern Nevada Association of Health Underwriters

Budget vs. Actuals: NABIP-NN Budget Jan 2023 - Dec 2023 - FY23 P&L

February 2023

	FEB 2023				TOTAL			
	ACTUAL	BUDGET	OVER BUDGET	% OF BUDGET	ACTUAL	BUDGET	OVER BUDGET	% OF BUDGET
Income								
4090 NABIP Membership Dues	162.36	167.00	-4.64	97.22 %	\$162.36	\$167.00	\$ -4.64	97.22 %
EXPO Income	400.00	0.00	400.00		\$400.00	\$0.00	\$400.00	0.00%
Holiday Party Income		0.00	0.00		\$0.00	\$0.00	\$0.00	0.00%
Luncheon Income	665.00	890.00	-225.00	74.72 %	\$665.00	\$890.00	\$ -225.00	74.72 %
Medicare Summit Income		0.00	0.00		\$0.00	\$0.00	\$0.00	0.00%
Metallic Sponsors	9,500.00	1,667.00	7,833.00	569.89 %	\$9,500.00	\$1,667.00	\$7,833.00	569.89 %
Raffle Income	215.00	167.00	48.00	128.74 %	\$215.00	\$167.00	\$48.00	128.74 %
Total Income	\$10,942.36	\$2,891.00	\$8,051.36	378.50 %	\$10,942.36	\$2,891.00	\$8,051.36	378.50 %
GROSS PROFIT	\$10,942.36	\$2,891.00	\$8,051.36	378.50 %	\$10,942.36	\$2,891.00	\$8,051.36	378.50 %
Expenses								
6180 Insurance					\$0.00	\$0.00	\$0.00	0.00%
6185 Liability Insurance		0.00	0.00		\$0.00	\$0.00	\$0.00	0.00%
D & O Coverage		0.00	0.00		\$0.00	\$0.00	\$0.00	0.00%
Total 6180 Insurance		0.00	0.00		\$0.00	\$0.00	\$0.00	0.00%
6270 Professional Fees					\$0.00	\$0.00	\$0.00	0.00%
Lobbyest Fees	1,150.00	0.00	1,150.00		\$1,150.00	\$0.00	\$1,150.00	0.00%
Total 6270 Professional Fees	1,150.00	0.00	1,150.00		\$1,150.00	\$0.00	\$1,150.00	0.00%
6550 Office Expenses					\$0.00	\$0.00	\$0.00	0.00%
6250 Postage and Delivery		0.00	0.00		\$0.00	\$0.00	\$0.00	0.00%
Name Badges		0.00	0.00		\$0.00	\$0.00	\$0.00	0.00%
Office Supplies		8.00	-8.00		\$0.00	\$8.00	\$ -8.00	0.00%
Total 6550 Office Expenses		8.00	-8.00		\$0.00	\$8.00	\$ -8.00	0.00%
6670 Program Expense					\$0.00	\$0.00	\$0.00	0.00%
CC Authorize.net Credit Card processing - Expenses	451.00	250.00	201.00	180.40 %	\$451.00	\$250.00	\$201.00	180.40 %
CE filing fee		62.50	-62.50		\$0.00	\$62.50	\$ -62.50	0.00%
Total 6670 Program Expense	451.00	312.50	138.50	144.32 %	\$451.00	\$312.50	\$138.50	144.32 %
Administrative Expenses					\$0.00	\$0.00	\$0.00	0.00%
Constant Contact		42.00	-42.00		\$0.00	\$42.00	\$ -42.00	0.00%

Northern Nevada Association of Health Underwriters

Budget vs. Actuals: NABIP-NN Budget Jan 2023 - Dec 2023 - FY23 P&L

February 2023

	FEB 2023				TOTAL			
	ACTUAL	BUDGET	OVER BUDGET	% OF BUDGET	ACTUAL	BUDGET	OVER BUDGET	% OF BUDGET
Name Change Expenses 2023		0.00	0.00		\$0.00	\$0.00	\$0.00	0.00%
Quickbooks On Line Fees	68.00	68.00	0.00	100.00 %	\$68.00	\$68.00	\$0.00	100.00 %
Registered Agent, Inc		0.00	0.00		\$0.00	\$0.00	\$0.00	0.00%
Star Chapter LLC	100.00	100.00	0.00	100.00 %	\$100.00	\$100.00	\$0.00	100.00 %
Total Administrative Expenses	168.00	210.00	-42.00	80.00 %	\$168.00	\$210.00	\$ -42.00	80.00 %
Board Strategy Meeting		0.00	0.00		\$0.00	\$0.00	\$0.00	0.00%
Charitable Donations					\$0.00	\$0.00	\$0.00	0.00%
Local Charities		0.00	0.00		\$0.00	\$0.00	\$0.00	0.00%
National Charities		0.00	0.00		\$0.00	\$0.00	\$0.00	0.00%
Total Charitable Donations		0.00	0.00		\$0.00	\$0.00	\$0.00	0.00%
Discretionary Spending					\$0.00	\$0.00	\$0.00	0.00%
Capital Conference Expense	170.13	0.00	170.13		\$170.13	\$0.00	\$170.13	0.00%
Day on the Hill		0.00	0.00		\$0.00	\$0.00	\$0.00	0.00%
Hupac		500.00	-500.00		\$0.00	\$500.00	\$ -500.00	0.00%
Miscellaneous Spending		21.00	-21.00		\$0.00	\$21.00	\$ -21.00	0.00%
National Conventions		0.00	0.00		\$0.00	\$0.00	\$0.00	0.00%
President's Discretionary Spending		21.00	-21.00		\$0.00	\$21.00	\$ -21.00	0.00%
Total Discretionary Spending	170.13	542.00	-371.87	31.39 %	\$170.13	\$542.00	\$ -371.87	31.39 %
Event Expenses					\$0.00	\$0.00	\$0.00	0.00%
EXPO Expenses		0.00	0.00		\$0.00	\$0.00	\$0.00	0.00%
Holiday Party Expense		0.00	0.00		\$0.00	\$0.00	\$0.00	0.00%
Luncheon Costs	1,432.65	1,055.00	377.65	135.80 %	\$1,432.65	\$1,055.00	\$377.65	135.80 %
Medicare Summit Expenses		0.00	0.00		\$0.00	\$0.00	\$0.00	0.00%
Total Event Expenses	1,432.65	1,055.00	377.65	135.80 %	\$1,432.65	\$1,055.00	\$377.65	135.80 %
Uncategorized Expenses					\$0.00	\$0.00	\$0.00	0.00%
Awards		0.00	0.00		\$0.00	\$0.00	\$0.00	0.00%
Media Budget		80.00	-80.00		\$0.00	\$80.00	\$ -80.00	0.00%
Total Uncategorized Expenses		80.00	-80.00		\$0.00	\$80.00	\$ -80.00	0.00%
Total Expenses	\$3,371.78	\$2,207.50	\$1,164.28	152.74 %	\$3,371.78	\$2,207.50	\$1,164.28	152.74 %

Northern Nevada Association of Health Underwriters

Budget vs. Actuals: NABIP-NN Budget Jan 2023 - Dec 2023 - FY23 P&L

February 2023

	FEB 2023				TOTAL			
	ACTUAL	BUDGET	OVER BUDGET	% OF BUDGET	ACTUAL	BUDGET	OVER BUDGET	% OF BUDGET
NET OPERATING INCOME	\$7,570.58	\$683.50	\$6,887.08	1,107.62 %	\$7,570.58	\$683.50	\$6,887.08	1,107.62 %
NET INCOME	\$7,570.58	\$683.50	\$6,887.08	1,107.62 %	\$7,570.58	\$683.50	\$6,887.08	1,107.62 %



UMPQUA BANK

February 28, 2023 Page: 1 of 2

Customer Service:
1-866-486-7782

N.N.A.H.U.
PO BOX 20129
RENO NV 89515-0129

Last statement: January 31, 2023
This statement: February 28, 2023

Please be aware that items may be presented for payment multiple times when your account does not contain sufficient funds to pay the item(s). We may charge you a fee each time an item is presented and you do not have sufficient funds in your account to pay the item. For services to help you manage your account, visit www.umpquabank.com/globalassets/media/documents/overdraft_disclosure_for_business_accounts.pdf

COMMUNITY BUSINESS CHECKING

Account number	974492837	Beginning balance	\$64,699.68
Low balance	\$66,539.36	Deposits/Additions	\$10,942.36
Average balance	\$70,869.64	Withdrawals/Subtractions	\$3,371.78
Interest earned	\$0.00	Ending balance	\$72,270.26

Deposits/Additions

<u>Date</u>	<u>Description</u>	<u>Additions</u>
02-01	Deposit	3,500.00
02-15	Deposit	2,900.00
02-15	Deposit	135.00
Total Additions		\$6,535.00

ACH and Electronic Payments/Subtractions

<u>Date</u>	<u>Description</u>	<u>Subtractions</u>
02-02	ACH Debit Authnet Gateway Billing 127012812 20230202	15.45
02-02	ACH Debit Nevada State Ahu Bill Paymt 20230202	1,150.00
02-03	ACH Debit Merchant Bankcd Discount 496206203887 20230203	420.55
02-24	ACH Debit Atlantis Casino Bill Paymt 20230224	1,432.65
Total ACH and Electronic Payments/Subtractions		\$3,018.65

NNAHU Treasurer's Report

For month end 2/28/2023

Sponsorships 2023:

Diamond-Anthem \$7,500

Gold-Aetna & United Healthcare-NV \$3,500

Silver-Alignment, Hometown Health, Prominence & Word & Brown \$2,500

Bank Account Balance:

2/28/23 \$72,270.26

See attached bank statement.

Budget: Attached

Luncheon: February Luncheon

Attendance: 40 (4 comps) Actual attendance 36

No Shows: 5 (2 comps)

Walk Ins: 1

Income: \$1,375

Cost: \$1,432.65

Raffle Income: \$215

Additional Information:

Still working on cleaning up QuickBooks. Almost there.

Received a \$2,900 check from Alignment for the Partnership Plan for the Medicare Summit

Includes \$400 for the EXPO Booth

~~Sircon~~—invoice for \$120—with credit we owe \$69. Need confirmation this is correct.

Hometown Health, Prominence and Word & Brown Partnerships still need to be paid

USLIC Policy (D&O) renews 5/1/23. Cost is \$1,580 same as last year. Our portion is \$530

The Hartford-Liability Policy renews 3/29/23 Cost is \$1,126 up from \$1,005. Our Portion is \$375

PO Box Name has been changed. I have copies for future treasurers if changes need to be made.

Respectfully submitted:

Joy K Gardner

