

# 2021 Tampa Bay ISCEBS Board Monthly Call: January

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**Date:** January 7, 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:

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**Welcome new board members!**

**Webinar Coalition** – no update

### **Treasurer role**

- The chapter will continue to have a primary and secondary authorized board member to access the chapter's bank account
- Scot to work with Dave and Regions Bank to arrange access and Michelle will discontinue her access

### **New grad outreach**

- At-large board members (3) to coordinate outreach to new grads and test takers

### **Fundamentals Program**

- Discussed an in-person program late summer or early fall
- Chapter will discuss again during the February call to determine timing and venue considerations

### **Educational Programs/Schedule**

- First program – panel discussion on FSAs and new special rules
  - February 10 or 11 from 12:30pm to 1:30pm
  - Flexible Spending Account special flexibility options for employers through the Consolidated Appropriations Act of 2021
  - Dave/Anthony to work on FSA vendor representation
  - Scot to work on compliance representation
  - 2-3 additional panelists needed - tbd
  - Dave to facilitate / moderate
  - Webinar coalition conflict? Michelle to confirm
- Future programs
  - Legislative update in connection with new President/Congress
  - board members come prepared for topics at next mtg