

Tampa Bay ISCEBS Board – Monthly Meeting

Date: Friday, June 24, 2022

Time: 9:00am – 9:45am

Attendees: Jennifer Chartrand, Anthony Donatelli, Scot Grooms, Steve Hall, John Phan, Rebecca Witherow

Purpose: Monthly Chapter Board Call

Discussion topics:

1. Call to Order.
2. May minutes approved.
3. Financial Update – \$10,313.47 balance
4. July 14 event -- David Ross, Brown & Brown - How to Build a Winning Health Plan
 - a. Approaching 40 registrants so far
 - b. Concern**
 - i. Brown & Brown advised Tracy/Becca last Thursday of their lack of comfort for other advisors/consultants/brokers to attend due to “proprietary” content
 - ii. B&B expressed the potential wish to disinvite registered advisors (other than board)
 - iii. Board discussed this and there was a consensus for concern of possible “sales” presentation versus education
 - iv. Becca/Tracy to discuss and debrief last Thursday call with B&B and update the board
 - c. Projected event cost around \$4,200
 - d. Becca/Tracy to let us know if any additional help is needed, such as name tags
5. Website Update – Board Meeting Notes were added to the site
 - a. Reminder: Board member roles and responsibilities are up on the site. Take a look if you haven't already
 - b. Here is the link to the site: <https://www.tampaiscebs.org/our-sponsors.html>
6. Newsletter Update – first Newsletter went via email on June 3rd
7. Next board meeting is Friday July 22, 2022 at 9 a.m.