

# ANNUAL SUMMARY REPORT OF ACTIVITIES AND ACCOMPLISHMENTS

## JULY 2021 TO APRIL 2022

### **JULY 13<sup>TH</sup> – STRATEGIC PLANNING MEETING**

- Our Annual Strategic Planning Meeting was held at Dove Canyon Country Club where we worked together as a new board to brainstorm our key initiatives for the upcoming year.

### **AUGUST 3<sup>RD</sup> – MONTHLY BOD MEETING – held via GoToMeeting**

### **AUGUST 31<sup>ST</sup> through SEPTEMBER 2<sup>ND</sup> – 9<sup>TH</sup> ANNUAL SENIOR SUMMIT at Pechanga Resort Casino**

### **SEPTEMBER 7<sup>TH</sup> – MONTHLY BOD MEETING – held via GoToMeeting**

- Our Annual motions were held at this meeting #1 through #6

### **SEPTEMBER 22<sup>ND</sup> – ANNUAL CE DAY – held at Tustin Ranch Golf Club**

- Our first back to person monthly meeting

### **OCTOBER 5<sup>TH</sup> – MONTHLY BOD MEETING – held via GoToMeeting**

- Our Annual budget was presented and approved at this meeting

### **OCTOBER 12<sup>TH</sup> – REGULAR MONTHLY LUNCHEON – held at Tustin Ranch Golf Club**

- Carrier Panel – Open Enrollment Strategies for Individual and Small Group

### **NOVEMBER 2<sup>ND</sup> – MONTHLY BOD MEETING – held via GoToMeeting**

- We won the CAHU Large Chapter of the Year and Outstanding Newsletter Awards

### **NOVEMBER 17<sup>TH</sup> – VANGUARD Event – held at Brewery X - Anaheim**

- Take a Break from 4<sup>TH</sup> Quarter – we raised \$250 for PAC during this event.

### **DECEMBER 14<sup>TH</sup> – MONTHLY BOD MEETING – held via GoToMeeting**

### **JANUARY 5<sup>TH</sup> – MONTHLY BOD MEETING – held via GoToMeeting**

### **JANUARY 11<sup>TH</sup> – MONTHLY MEMBERSHIP MEETING – held at Tustin Ranch Golf Club**

- CAHU Leg Update - Dawn McFarland and Brad Davis – CAHIP Leadership speak about upcoming State legislation and name change

### **FEBRUARY 1<sup>ST</sup> – MONTHLY BOD MEETING – held via GoToMeeting**

### **FEBRUARY 8<sup>TH</sup> – MONTHLY MEMBERSHIP MEETING – held at Tustin Ranch Golf Club**

- Ancillary Panel with MetLife, Principal and Colonial Life

### **FEBRUARY 9<sup>TH</sup> – VANGUARD EVENT – lip-syncing – held virtually**

### **FEBRUARY 28<sup>th</sup> – March 2<sup>nd</sup> – Washington DC**

- In addition to our dedicated BOD members that attended, we awarded two scholarships to attend, and the winners were Jennifer Gonzales and Peggy Thomas
- Our chapter was also awarded with the Legislative Excellence Award

### **MARCH 3<sup>rd</sup> – MONTHLY BOD MEETING – held via GoToMeeting**

### **MARCH 11<sup>th</sup> – Sales Symposium – Lake Forest Community Center**

- Taking Care of Business | Elevating your Game – we had Vince Ferragamo as our keynote speaker, provided 3 separate tracks of CE's totaling 3 for each participant that attended.
- Robert Semrow was our Pinnacle Award Winner

### **FUTURE PLANNED EVENTS**

- APRIL 25<sup>th</sup> – 25<sup>th</sup> Annual Take a Swing Fore the Cure Charity Golf Classic
- May 17<sup>th</sup> – Monthly Membership Meeting
- June 10<sup>th</sup> – Women in Business Event
- August 23<sup>rd</sup> – 10<sup>th</sup> Annual Senior Summit