

## Agenda & Minutes 7/21/2004

Minutes are in *Italics*

- I. Direct Mail
  - A. Steve has ordered approx. 1,200 names of Casualty Brokers in the South Bay area at 15c each \$180, from JART Direct Mail
  - B. Need to develop brochures, letters
    - 1. *Henry will complete this by 8/1*
  - C. Envelopes
    - 1. *Steve will complete by 7/23*
  - D. 1<sup>st</sup> Class or Bulk
    - 1. *We will use JART's bulk rate permit*
  - E. Telephone Contact
- II. CE Credits
  - A. Costs
    - 1. \$64/hour of CE
  - B. Completion of the Application for CE from DOI
    - 1. Getting the information from our speakers
      - a. *Joe will contact the speakers by 7/23*
    - 2. Rescheduling John Kent Esq. on Disability/Workers Comp. Issues
- III. Change Meeting Location or Time?
  - A. *Everyone likes it, as is. Convenient location and ends by 9AM so a minimal amount of work time is lost.*
- IV. How to contact those in CPCU and IIA Classes
  - A. We have a list from National of about 10 CPCU Candidates and maybe 20 IIA Candidates
    - 1. *Joe will contact them*
    - 2. It's a one time list
  - B. See # I above
- V. National Convention
  - A. Marshals
- VI. Other ways to attract more attendance?
  - A. *Pat suggested contacting large employers and pointing out the training benefits. Steve will locate classes and CPCU literature to aid Pat and post to our website www.SouthCoastCPCU.com*
  - B. *Steve will send contact information for our members to those in attendance.*
  - C. *Alan will call the "Past Active" Presidents and Officers*