

Agenda & Minutes 8/18/2004
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
 - 1. This should be at the Post Office on Wednesday or Thursday
 - B. Telephone Contact
 - 1. *No plans to contact Non-CPCU's at this time, priority is to get better and more interesting meetings planned*
- 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
 - b. *Joe's computer is down, Steve will use snail mail for him and Henry - Joe will contact our 11/17 speaker on completing the CE applicaiton*
 - 2. Rescheduling John Kent Esq. on Disability/Workers Comp. Issues
 - a. *Postponed - Earl will get a Worker's Compensation Speaker for 9/15*
 - (1) *Joe will contact Alpine Village to let them know we will be there in September*
- III. 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*
 - a. Has this been done?
 - b. *Joe has contact 5/10 of them and they are very interested*
 - (1) *Joe will provide email addresses to Steve so they can be added to the distribution list*
 - 2. It's a one time list
 - B. See # I above
- IV. National Convention
 - A. Marshals
- V. 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*
 - 1. Status?

- B. *Steve will send contact information for our members to those in attendance.*
 - 1. Completed?
- C. Alan will call the "Past Active" Presidents and Officers
 - 1. Status?
 - a. *Unknown - Alan wasn't at meeting*
 - b. *Henry & Joe will divide up the list for calling and fax copy to Steve*
- D. *Earl suggested that we need more Telephone contacts, warm & fuzzy, more personal, networking & comraderie, people want value for their time, we are competing for people's time.*
- E. *Steve is now using the www.Evite.com system. It allows people to RSVP and make comments. Steve & Joe will discuss privacy issues, email addresses and letting the whole group view who's coming*
- F. *Henry will work on a 25th Anniversay Dinner Dance 1/24/2005 Alpine Village Emerald Room*