

CLASP AGENDA
March 18, 2020 12:00 P.M.
EXECUTIVE COMMITTEE MEETING

CALL IN: 712-451-0230; code 260636

BPU INVESTMENT MANAGEMENT (NOW WEALTH ENHANCEMENT GROUP)
OFFICES
33rd FLOOR OXFORD CENTER

Officer Reports:

- a. **President** Lisa Standish
- b. **Treasurer** Shelly Magri
- c. **Secretary** Katie Markowski

Committee Reports:

Policies and Procedures Mark Gubinsky/ Joe Williams
Status/vote on new participation agreement
Vice president?
Add data form to protocols?

Marketing Bobby Standish/Bernadette Staroschuck

Education Mary Flaherty
Upcoming events?

Training Dorothy O'Neil/ Deb Gilman
Basic training?

Membership Chris Stachtiaris/ Donna Cheswick
Data form?
Status of dues payments

Ethics Patricia Boswell/ Susan DiGirolamo

Civil Liberty Weyandt

Social Seth Dresbold / Brooke McMorrow

Upcoming events?

Pro Bono Karen Fadzen / Joyce Smith

Retreat

At Large Members Mary Ann Ernette, David Miller, Courtney Knox, Lea Anderson, Bill Steiner, Julia Kramer

Old Business

New Business Kaplan lecture?

Next meetings:
April special format
May 20 regular meeting
June special format – summer party
July 15 regular meeting
August special format