

NACBA – Alamo Chapter
Minutes of June 13, 2013, 11:30 a.m.
Genesis Full Life Fellowship, San Antonio, TX

Officer Attending: David Thomas, President; Butch Gerfers, outgoing Treasurer, Dale Hendrix, incoming Treasurer; Norm Hils, incoming Secretary.

Members Attending: Mark Elliott, Shawna Hajali, Allen Young.

Guests Attending: Gerri Smith (Regnier & Assoc.), Naome Allen (Genesis Full Life Fellowship), Tim Ripp (Associates of Clifton Park).

Dave Thomas opened in prayer.

Report/Action Items:

1. Minutes of the May 9, 2013 meeting were reviewed and approved as presented.
2. Butch Gerfers provided copies and presented the May 2013 financial report. Income: \$130.00. Expenses: \$1,545.00 (included the annual disbursements of the approved gifts to three non-profit organizations). Net Income: (\$1,415.00). Account balance: \$512.12. The report was approved as presented.
3. Dave Thomas thanked those stepping down from officer positions for their leadership, and introduced and “installed” the new officers.

President: Dave Thomas
Vice President: Darla Nelson
Secretary: Norm Hils
Treasurer: Dale Hendrix

4. There will not be a general membership meeting in July. The chapter officers will connect to plan the chapter’s upcoming year of events. Norm Hils will represent the chapter at this year’s NACBA Conference in Charlotte and attend the Chapter President’s Luncheon in Dave Thomas’s place.

Program: “Long Term Care Planning”

- Shawna Hajali of Waddell & Reed Financial Planners introduced Tim Ripp from Associates of Clifton Park who presented a thorough and informative briefing on the importance of preparing for the need of Long Term Care. Tim said, “It’s the greatest gift we can give to our family.” Typical LTC will cost \$50K-\$80K a year.
- A packet was handed out to attendees, and Shawna and Tim offered their services to help any church in any way they can. Even if it’s just educating the congregation. If you missed the meeting, it might be worth giving them a call. Shawna can be reached at 210-826-0685 x122 OR mhajali@wradvisors.com.

Next Meeting: August 8th, 11:30 a.m. at Northern Hills UMC (Mark Elliott’s church) Program TBD.

Mark Elliott adjourned us in prayer.

Respectfully,

Norm Hils