

BNW notes 5/16/18

Members Present

Lee, Aaron, Mike, Jerry, Tracy, Steve, Mark, Liz, John, Joe, Bill

Members Absent: none

Guests: None

Greeter: Mike

Events in Woodbury

- Summer of Wellness if Woodbury May 19-Oct 14
- Chamber after hours at O'Malley's - light attendance
- Chamber Luncheon thus Friday
- Friday US Bank Stadium - PULSE - free event doors open at 6:30
- June 4th Chamber golf outing
- June 18th Young Life golf tourney

Prompter: Liz

Where are we in terms of goals and how we're staying focused (round table discussion)

Headliner: Mark

- Born in Woodbury, went to Gustavus, where he found his entrepreneurial spirit by throwing 1 party a month to pay for utilities and kegs for upcoming parties.
- managing \$53,000,000 of assets
- vision is to get to \$100,000,000 after that goal hoping to get to \$200,000,000 in assets
- new software E-Money, brings all accounts from all institutions to one place, easy to adjust things as well
- 50% of his clients don't have a will and he's hoping to help guide them through getting one to make things easier for their loved ones
- market- some corrections in the 1st quarter occurred, which is normal

30 second commercials

Next Week:

Greeter: Aaron

Prompter: Mark

Headliner: John