

Memo

To: XPX South FL Members; Mary Adams; Angie
From: Executive Committee
Date: January 12, 2021
Re: Agenda for XPX SFL Zoom Call January 12,
2021 4:30-5:15 PM

1. **Call to Order:** Three new members will each give a 30 second introduction. Two Sponsors will each give a one-minute introduction.
2. **Welcome** to our Chapter's New Members who joined in December 2020: **Michael Aronson, Morgan Stanley; Jeffrey Hogue, USB Financial Services, Inc.;** and **Marc Horowitz, Amerivest Group. We now have 44 members.**
3. **EVENTS:** Power of Five continues to be successful for getting to know the Members of our Chapter and the Members from other Chapters of XPX. Please go to our XPX South Florida Website at "Events" to sign up for February.

Here is the direct ink for the local and national cross Chapter Power of Five: <https://exitplanningexchange.com/south-florida/events>

4. Latest Event in December 2020.

Our second interactive Web meeting with discussion and networking, was successfully presented by Magda Waszkiewicz (Brown and Brown Insurance) on December 16, 2020 featuring Kara Lynn Joyce, former celebrity Olympic gold medalist, who told us her story about her pivot during Covid when she enhanced and grew her business as CEO of LEAD, a Sport Tech Company.

Members--Do you have a business owner who has recently transitioned or exited a business to nominate to be on the next South Florida Fireside Chat in 2021?

5. XPX South Florida is looking for Speakers and Case Studies for 2021 Panel Events: Will you please contact Rana Gorzeck and Charlie Faron to volunteer for 2021? We are planning panel discussions and a case study series which will need your exit planning expertise and speaking/presentation skills. Please let us know if you are willing to be either a moderator and/or a panelist and send us a few bullet points letting us know your specific expertise/niche. Please send us your ideas for Case Studies showing interesting exit strategies, as well. Please reply to: charles.faron@gmail.com and rgorzeck@warddamon.com.

6. Save the Date; March 9, 2021 @ 4:30 PM: Next Chapter Meeting (Second Tuesday of Every Other Month).

7. New Appointments in our Chapter: Rana Gorzeck (Ward Damon PL) has been appointed Vice President of the Chapter.

8. One Remaining Founding XPX FL Sponsorship: ONE SPONSORSHIP IS AVAILABLE until January 31, 2021 . This will be your last chance for your company to be a Founding and Continuing Sponsor of our Chapter at the reduced rate of \$1,000.00 annually. After January 31, 2021, the annual Membership and Sponsor rates will be raised.

9. Committee Reports: Next Meeting Dates and Chairperson Reports

10. President's Report regarding XPX National Updates and Upcoming Events from the Event Development Committee and Education/ Content Committee (CEF)

Next Members' Meeting scheduled for Tuesday, March 9, 2021 from 4:30 PM to 5:15 PM.

End meeting at 5:15 PM.