

Meeting Minutes
Progressive Referral Group
Thursday, July 20th 2023
Deb's Corner Cafe

President: Dawn Walker
Vice President: Rich Hawkins
Treasurer: Jesse Hamilton
Secretary: Mark Bohach

Members Present: Greg- American Eagle Mortgage. Brenda- APG Media, Kasey- Fairfield Financial Solutions, Dawn- Fairhope Hospice, Sean- Focus Realty Property Management, Michelle- Friendly Bremen Banking Center, Cheryl- Lancaster- Fairfield Co Chamber, Matthew- MMA Insurance-Personal & Commercial Lines, David- National Telehealth Solutions, Jesse- Ruff and Associates, Bill- UR PC Help, Mark- WLOH Radio

A quorum was not met.

Treasurer's Report: \$6082.84
Outstanding invoice- Third qtr- 2

Referrals Given: 8
Talked to someone as a result of a referral: 3
Discussed PRGL with someone outside the group: 4

New Business:

- Executive Committee meeting – Wednesday 7-26-23 Noon at Max and Ermas.

Old Business:

- None

Announcements:

- Athena Banquet- 8-3-23 at The Mill
- Ribbon Cutting- 8-4-23 at Boujee Barn
- State of the County- 8-22-23 11:30 AM at The Wigwam
- Chamber Golf Outing- 9-15-23 at Valleyview

Acknowledgments

- David W. thanked Jon Wymer for his prompt service.

Speaker: Kasey Massatti- Fairfield Financial Solutions.

Kasey is a partner with both Ruff and Associates and Fairfield Financial Solutions. Fairfield Financial Solutions is a full service financial planning company. They are one of only 65 companies authorized to handle life settlements- where you can get paid for unneeded life insurance policies.

Regarding 529 Plans- these have been recently expanded what the money can be used for. These include K-12 education plus college tuition, food and living expenses and books.

Roth IRA's- a great investment because the money grows tax free. There are instances where gains can be taken out prior to age 59 ½. They work with local attorneys on Medicaid Planning.

Kasey loves teaching kids about financial literacy- how to plan responsibly.

Fairfield Financial Solutions offers free initial consultations and free annual followup visits with clients.

Ruff and Associates is currently looking for a Bookkeeper.

Respectfully submitted by
Mark Bohach, Secretary of PRGL