

AGA Chapter Meeting Minutes March 1, 2012

Submitted by Mary Anne Queen, Secretary

The Nashville Area Chapter held its March meeting at the Nashville City Club on Thursday, March 1, 2012.

President Shirley Henry called the meeting to order and said it was good to see everyone. Jerry Durham gave the invocation.

Shirley introduced the individuals at the head table: Andy Valentine, speaker; Jerry Durham, CGFM Chair and Two-Year Director; Gerry Boaz, Corporate Sponsorship Chair; Penny Austin, Newsletter Editor; and Rhonda Williams, Education Co-Chair.

Shirley called on those who brought guests to introduce them. She also recognized three new members who were in attendance.

Shirley announced that March was CGFM Month, and Jerry Durham came to the podium and called the names of all CGFMs who had registered for the meeting so they could be recognized individually and as a group. Jerry presented the proclamation that the chapter had received from the Metropolitan Government of Nashville and Davidson County in recognition of CGFMs. He also announced that the training was ready for those that were interested in taking the CGFM exams. Shirley announced that the chapter currently has 167 CGFMs, and all will be recognized in the March Newsletter. She said the chapter hopes to have some new names to add to the list next year.

Gerry Boaz introduced the speaker, Andy Valentine, CFP, Senior Vice President, Morgan Stanley Smith Barney, who gave a presentation on Volatility and the Long-Term Investor. In appreciation for Mr. Valentine speaking to the chapter, the chapter will make a donation to the Nashville Opera Association, his charity of choice.

Minutes

Shirley Henry asked if there were any corrections to the minutes for the February 2, 2012, chapter meeting, and since no corrections were noted, the minutes were considered to be approved as published on the website.

Shirley then called for announcements from the various committees.

Announcements

Accountability Outreach

Accountability Outreach Chair Karen Hale announced that the chapter will hold a contest and challenge teams of no more than two people to create a citizen-centric report. The chapter will present an award to the Early Careers team with the best report and an award to the full member team with the best report. The prize for each winning team will be a fully paid annual

membership for each member of the team. Karen can be contacted for more information at karen.b.hale@cot.tn.gov.

Program

Shirley said that Britt Wood had asked her to announce that on April 14, the chapter will have a social at the Sounds baseball game. The chapter will rent the Delta Dental Deck, and the event will be free for chapter members and \$5 per guest. More information will be coming out soon. Shirley also announced that the Bunco Party at Bosco's has been cancelled since not enough members signed up for the planned event.

Shirley announced that the next chapter meeting will be held on April 5, and the speaker will be from the Nashville Chamber of Commerce.

Door Prizes

Rhonda Williams won \$25, and Ron Queen won a voucher for a free chapter meeting lunch.

There being no further business, Shirley declared the meeting adjourned.