



TRUSTEE ORIENTATION AGENDA

June 30, 2022

The Clear Lake City Community Association, Inc. will meet at 3:00p.m. on Thursday, June 30th. The meeting will be held at the Clear Lake Recreation Center located at 16511 Diana Lane, Room B.

PLEASE NOTE:

**THIS IS A TRUSTEE ORIENTATION / WORKSHOP FOR TRAINING PURPOSES ONLY.
NO PUBLIC BUSINESS WILL BE CONDUCTED AT THIS WORKSHOP.
NOT OPEN TO THE PUBLIC OR CLCCA PROPERTY OWNERS.**

To all present:

Please Turn Off your CELL Phones

AGENDA:

- 3:00 President Introduction - This orientation is being provided in accordance with Bylaw 3.3 for the benefit of the CLCCA Board of Trustees to better understand how to administer their duties and fiduciary responsibilities.
- 3:05 Kevin Kimmel, Risk Advisor, BCH Insurance [20 Min]
- 3:30 Jeff Aboloff, UBS, Financial Advisor [20 Min]
- 4:00 Margaret Maddox - Daughtry & Farine, Attorney [60 Min]
- 5:00 Break
- 5:10 Scott Scarborough – Canady & Canady, Auditor [20 Min]
- 5:30 Stan Cook, 2022-23 CLCCA Board President [5 Min]
- 5:35 Glenda Stroud - Fiscal Year End Closeout, Check Registers, and Asset Management [10 Min]
- 5:45 Dismissal