

# CAHIP-IE BOD Meeting Agenda

CAHIP-IE Board of Directors Meeting		
4.7.2026	11:00am to 12:30pm	IN PERSON @ HRBC & Zoom
Meeting called to order		Cherie Powell
Invocation given by		
Roll Call		Lisa Wood
Approval of Minutes		
Treasurer's Report		Christina Garcia
Voting Items		•
President's Report		Cherie Powell
Old Business		<ul style="list-style-type: none"> <li>CAHIP Capitol Summit: Delegates &amp; Alternatives have been submitted   Who is registered?                             <ul style="list-style-type: none"> <li>March 18 Membership Appreciation Event                                     <ul style="list-style-type: none"> <li>April 9<sup>th</sup> Meeting with Paul Roberts</li> </ul> </li> </ul> </li> </ul>
New Business		<ul style="list-style-type: none"> <li>2026 Golf Tournament Planning – Need Committee Meeting Dates                             <ul style="list-style-type: none"> <li>2 BOD's members to represent at the 2026 NABIP Convention</li> </ul> </li> </ul>
President-Elect		Shelley Hoover
Membership/Retention		Maura Zamarripa
Professional Development		Diane Barrera
Leg Report		Ashley Ingram
PAC Report		David Johnston
Communications & Media		Brandi Potlongo
Awards		OPEN
Community Service		Kristie Scavarda
Medicare Report		Yolanda Webb   Henry Romero
Hospitality Committee		Alanda Dyer
Golf Committee		Henry Romero
Symposium Committee		Cherie Powell

## CALENDAR OF EVENTS

April 2026	May 2026	June 2026
7 <sup>th</sup> Symposium Planning & BOD Meetings	5 <sup>th</sup> & 6 <sup>th</sup> CAHIP Capitol Summit	2 <sup>nd</sup> Monthly BOD Meetings
9 <sup>th</sup> Monthly Chapter CE Course/RIV	12 <sup>th</sup> Symposium Planning & BOD Meetings	8 <sup>th</sup> Golf Tournament @ Victoria Club
11 <sup>th</sup> CAHIP Trail Talks @ Mt Rubidoux	15 <sup>th</sup> Symposium & PD Zoom Meetings	11 <sup>th</sup> Monthly Chapter Mtg - Webinar
17 <sup>th</sup> Symposium & PD Zoom Meetings	19 <sup>th</sup> CAHIP-IE 35 <sup>th</sup> Annual Sales Symposium	27 <sup>th</sup> to 30 <sup>th</sup> NABIP Convention

## ADDITIONAL NOTES

CAHIP Capitol Summit – May 5<sup>th</sup> & 6<sup>th</sup> @ the Capitol Event Center, Sacramento  
 NABIP Annual Conference – June 27 - 30 @Harrah's Resort, Atlantic City, NJ



# CAHIP-IE Board of Directors Meeting Minutes

## March 3, 2026

### Quick recap

The board meeting covered several key topics including the approval of delegates for the upcoming CAHIP Capitol Summit in Sacramento, with Cherie, Henry, and Brandi confirmed as delegates and Alanda and Donna as alternates. The board discussed and approved changes to their monthly meeting schedule, moving from the second Thursday to the third Thursday of each month to avoid conflicts with CAHIP's planned 2027 expo in Riverside. The membership appreciation event scheduled for March 18th was reviewed, with plans for pizza and social activities, while the board also addressed the need to improve member engagement and communication. Updates were provided on various legislative initiatives and bills, including single-payer healthcare efforts in Sacramento, and the board received a report on current membership numbers and retention efforts. The conversation ended with discussions about upcoming events including a hiking trip planned for April 11th and preparations for the Senior Summit in August, with emphasis placed on promoting events and securing venue arrangements.

### Next steps

- [Cherie, Henry, Brandi, Donna, Alanda: Book travel and accommodations for Sacramento trip \(May 5-6\) as soon as possible for best rates](#)
- [Ashley: Set legislative appointments for Sacramento trip attendees, to include Wayne Guzman](#)
- [Dawn: Check with Cherie regarding reimbursement for CAHIP board meeting attendance at Capitol Summit](#)
- [Dawn: Email CAHIP to confirm approval of 2027 Expo in Riverside and accept dates](#)
- [Dawn: Finalize and distribute call script for March 18th membership event by Wednesday](#)
- [All board members: Review and complete calls to member/potential member lists for March 18th event outreach by Thursday](#)
- [Brandi: Send communication blast about membership event tomorrow](#)
- [Brandi: Test text message communication app for March 18th event outreach](#)
- [Diane: Move John Roberts' presentation from June to September](#)
- [All board members: Register for April 11th 8:30am Mount Rubidoux hiking event](#)
- [Kristie: Send out notification about April 11th hiking event](#)
- [All board members: Send bios/information of potential new board members to Dawn and Cherie for review](#)
- [All board members: Donate baskets/containers and filler items to Lisa for golf tournament](#)
- [All board members: Reach out to contacts for additional golf tournament donations](#)
- [All board members: Complete registration for March 18th event](#)
- [Maura: Send information about previously contacted lapsed members to Dawn for list removal](#)
- [Maura: Sponsor and register invited guests for March 18th event](#)



- [Diane: Begin planning speed networking event in late September/early October](#)
- [All board members: Review website for membership application link to share with prospects](#)
- [All board members: Check updated calendar for May 12th board meeting date change](#)
- [All board members: Plan to attend August 30th Senior Summit at Riverside Convention Center](#)
- [Dawn: Launch full advertising push for August 30th Senior Summit beginning April 1st](#)
- [Yolanda: Create live commercials with George Carson for Senior Summit promotion](#)
- [Dawn: Complete hotel contract negotiations for 2026 Senior Summit](#)
- [All board members: Review and provide analytics from text message app test to Brandi for future planning](#)
- [Brandi: Investigate HootSuite social media tool for chapter use](#)
- [All board members: Complete registration for March 18th event \(repeated but noted as separate action\)](#)
- [\[Note: Some actions may be duplicates or variations of the same task - this list consolidates all explicitly stated follow-up items from the transcript\]](#)

## Summary

### Minutes & Financial Review

The board meeting began with Cherie calling it to order at 11:08 AM and an invocation led by Lisa. The board approved the minutes from the February 3rd meeting. Then we reviewed the treasurer's report, which showed an increase in funds due to higher revenue from the Senior Summit compared to the previous year. Lisa moved to approve the report, which was seconded by Ashley, and the motion passed with no opposition.

### Capitol Summit - Sacramento Trip & Delegate Planning

The meeting focused on planning and approving delegates for an upcoming Sacramento trip. Dawn confirmed that Cherie, Henry, and Brandi will serve as official delegates, with Alanda and Donna as alternates, and Yolanda attending on her own. Wayne Guzman will also be attending Capitol Summit in Sacramento. The conversation ended with a discussion about delegates and alternatives for Capitol Summit and budgeted amount for 5 individuals \$1000 each and discussed the need to book accommodations promptly to secure the best rates.

### 2026-2027 Meeting Planning Updates

The meeting covered several key topics, including the approval of monthly meeting dates for 2026-2027, the 2027 Expo location in Riverside, and a trade proposal with California Broker Magazine. Dawn reported on successful events. The group also discussed the Senior Summit, with Dawn highlighting favorable room rates and accommodations for downtown Riverside.

Additionally, the meeting addressed a change in the 2026-2027 chapter monthly meeting schedule from the second to the third Thursday to avoid conflicts with CAHIP's events and allow for better planning.



## **Capitol Conference & Region 8 Leadership Meeting Update**

The group discussed their recent NABIP Capitol Conference and meetings with legislators, where they advocated for changing their professional title from "brokers" to "health advocates" to better represent their work. Ashley mentioned that they typically meet with 6 legislators during their visits to Washington D.C., with 2 of those meetings occurring in their local area. Cherie reflected on recent lobbying visits, noting both helpful and challenging aspects of the experience, including issues with representative allocations and meeting logistics.

The group discussed the upcoming Region 8 meeting in San Francisco on August 16-17, which is optional but provides leadership and CE credits.

## **Members' Appreciation Event Planning**

The board discussed plans for an upcoming Members' Appreciation Event on March 18th, with Dawn and Cherie coordinating outreach to current, potential and former members. They agreed to divide a call list for board members to call. This event will charge \$15 for non-members and offer free membership for current members who attend. Dawn requested board members check the website for membership applications and event details.

The meeting discussed plans for a March 18th event, which will be a pizza and social gathering with a dessert bar and interactive elements. Cherie emphasized the importance of wearing badges and recognizing members, suggesting member appreciation activities like stand-ups or small gifts. Maura proposed including information about the benefits of NABIP, CAHIP, and IE, with short presentations from members about their experiences. The group also discussed the need for RSVPs and registration for the event.

## **Membership Updates**

Maura provided an update on membership numbers and reported on her efforts to contact lapsed members.

## **Legislative Updates**

Ashley provided updates on several legislative bills, noting that most did not advance and are now two-year bills. She highlighted key positions for CAHIP, including opposing AB 298 due to potential cost increases and supporting SB 579 with an amendment for better representation.



Ashley's written Leg report

## 3/3/2026 CAHIP-IE BOD Leg Report

### **Single-payer healthcare effort in Sacramento this year:**

A new **single-payer healthcare bill, AB 1900**, known as the *California Guaranteed Health Care for All Act* or *CalCare*, was introduced by **Assemblymember Ash Kalra (D-San Jose)** in February 2026. This legislation would establish a **statewide universal, single-payer health care system** — covering all residents regardless of immigration status and creating a centralized system to administer and finance healthcare.

This is **Kalra's third try** at single-payer in recent years and again reflects long-standing advocacy from groups like the **California Nurses Association** and other progressive allies.

However, *single-payer legislation has historically struggled to advance*, largely due to **cost concerns, legislative opposition, and complexities with financing and federal waiver requirements**. Previous versions (like AB 2200 and AB 1400) made it through some committees but stalled before full legislative votes.

### **Here's a brief update on key California health policy bills and what CAHIP's position is on each:**

**AB 4 (Arambula)** would expand Covered California eligibility to undocumented individuals starting in 2027, if funding is available. This bill missed legislative deadlines and is now a two-year bill. **CAHIP's position: Watch.**

**AB 280 (Aguiar-Curry)** strengthens provider directory accuracy requirements with phased benchmarks. *It did not pass by deadline* and is now a two-year bill. **CAHIP supports** accurate directories.

**AB 298 (Bonta)** eliminates cost-sharing for in-network services for people under 21. This also *missed deadlines* and is a two-year bill. **CAHIP's position: Oppose. Notes:** CAHIP is OPPOSED to AB 298, which would, effective January 1, 2026, prohibit any deductibles, copayments, coinsurance, or other cost-sharing for in-network health care services provided to individuals under age 21, with limited exceptions. The bill would also prohibit providers from billing or seeking reimbursement for those services. While CAHIP appreciates the author's intent to reduce healthcare costs for young Californians, there are existing cost savings mechanisms in place for this population. The proposed mandate raises significant concerns about unintended consequences – particularly as enhanced APTC subsidies are set to expire this year. In California's current fiscal climate, offering such broad benefits risks cost-shifting onto other payers, including small group and employer sponsored coverage, many of whom cannot absorb these increases. Additionally, this proposal would render affected plans incompatible with Health Savings Accounts (HSAs), creating further disruption in the market.

**AB 577 (Wilson)** prohibits certain pharmacy steering practices. *Did not advance* this session and is now a two-year bill. **CAHIP Opposes**

**AB 787 (Papan)** would require faster insurer responses when members need help finding in-network providers. *Did not move forward* this year and is a two-year bill. **CAHIP's**



**position:** *Watch.* **Notes:** CAHIP is WATCHING AB 787 which would require an insurer to provide a list of providers covered by an enrollee's health plan who are accepting patients within two business days upon a request for assistance from an enrollee, and, requires a health plan's provider directories to include information advising an enrollee to contact their health plan for assistance finding an in-network provider. While we support improved provider directory accuracy we have concerns with the strict response windows in this bill, especially when they involve confirming provider availability which is outside of the plan's prevue.

**AB 1386 (Bains)** makes perinatal services a required basic hospital service statewide. *Did not meet the deadline* and is now a *two-year bill*. **CAHIP's position:** *Support.* **Notes:** CAHIP SUPPORTS AB 1386 which would reclassify perinatal services as an essential service that all general acute-care hospitals must provide. The bill would also require any hospital not currently offering perinatal services to submit a perinatal service compliance plan to the state Department of Public Health. CAHIP supports this effort to expand access to maternal care and improve health outcomes for women and infants across all California communities.

**SB 242 (Blakespear)** would create a guaranteed annual *90-day Medigap enrollment period*; the bill *did not advance* and is now a *two-year bill*. **CAHIP opposed** this change due to concerns about premium increases.

**SB 354 (Limón)** overhauls insurance consumer privacy rules; the bill is now a *two-year bill*. **CAHIP's position:** *Oppose.* **Notes:** In a coalition with other agent organizations, CAHIP is OPPOSED to SB 354 which would repeal the current Insurance Information and Privacy Protection Act (IIPPA) in its entirety and replace that law with a new, highly complicated and expansive set of regulatory prohibitions and obligations.

Independent agents and brokers respect the privacy rights of their clients and support laws and regulations to protect their client's personal information. However, the goal is to achieve a balance that ensures the consumers' personal information is protected and allows independent agents to service their client's insurance needs pursuant to a statute they can readily implement.

**SB 363 (Wiener)** would require more reporting on denials and independent medical reviews; it *did not progress* this session and is also a *two-year bill*. **CAHIP's position:** *Watch.*

**SB 535 (Richardson) – The Obesity Care Access Act** would require coverage of bariatric surgery and at least one FDA-approved anti-obesity medication, including potential GLP-1 drugs, beginning in 2026. The bill is now a two-year bill. **CAHIP position:** *Watch.* While recognizing potential public health benefits, there are significant affordability concerns. With more than 3 million Californians living with obesity, mandated GLP-1 coverage could create substantial premium increases and risk loss of coverage due to cost pressures.

**SB 579 (Padilla)** establishes a Mental Health and Artificial Intelligence Working Group to evaluate AI's role in mental health care, with findings due in 2028. It is now a two-year bill. **CAHIP position:** **Support if Amended** to include an agent representative.



### **Professional Development Updates**

The board agreed to continue with the annual speed networking event, though potentially earlier in the year. Diane confirmed speakers for upcoming professional development events and mentioned plans to start planning the next speed networking event in September.

### **Communications Updates**

Brandi discussed plans for a membership event and inquired about using a texting app for communication, with Dawn clarifying that member permission is required for such methods. The conversation ended with a brief discussion on communication strategies. The meeting covered several topics, including a discussion about text messaging for event notifications, with Dawn suggesting it's better to ask for forgiveness than permission. Brandi reported working with Eileen in Orange County on social media and considering Hootsuite for scheduling posts.

The group discussed a proposed April 11th event at Mount Rubidoux, with Dawn encouraging attendance and planning to send out information. Dawn also provided an update on the Medicare Summit scheduled for September 1-3, 2026 at the Riverside Convention Center, emphasizing the need to promote the venue and discussing potential cost negotiations for 2026.

### **Golf Tournament Updates**

The board discussed several key topics including donations for an upcoming golf tournament, membership retention, and professional development. Lisa oversees donations and will be coordinating with members to collect items. Lisa mentioned she needs help gathering baskets, containers, and fillers for the upcoming golf tournament auction.

04/01/26

INLAND EMPIRE ASSOC HEALTH UNDERWRITERS INC

**Balance Sheet Comparison**

As of March 31, 2026

---

	<u>Mar 31, 26</u>	<u>Mar 31, 25</u>
<b>ASSETS</b>		
Current Assets		
Checking/Savings		
105 Banc of California	52,873	48,805
<b>Total Checking/Savings</b>	<u>52,873</u>	<u>48,805</u>
<b>Total Current Assets</b>	<u>52,873</u>	<u>48,805</u>
<b>TOTAL ASSETS</b>	<u><u>52,873</u></u>	<u><u>48,805</u></u>
<b>LIABILITIES &amp; EQUITY</b>		
Liabilities		
Current Liabilities		
Other Current Liabilities		
205 Prepaid Income	0	0
<b>Total Other Current Liabilities</b>	<u>0</u>	<u>0</u>
<b>Total Current Liabilities</b>	<u>0</u>	<u>0</u>
<b>Total Liabilities</b>	0	0
Equity		
Opening Bal Equity	0	1,219
Retained Earnings	55,573	73,969
Net Income	-2,700	-26,383
<b>Total Equity</b>	<u>52,873</u>	<u>48,805</u>
<b>TOTAL LIABILITIES &amp; EQUITY</b>	<u><u>52,873</u></u>	<u><u>48,805</u></u>

10:29 AM  
04/01/26  
Accrual Basis

INLAND EMPIRE ASSOC HEALTH UNDERWRITERS INC  
Income & Expense Compared to Annual Budget  
July 2025 through March 2026

	<u>Jul '25 - Mar 26</u>	<u>Budget</u>	<u>% of Budget</u>
Ordinary Income/Expense			
Income			
301.1 CAHIP-IE Dues	2,100	2,950	71%
303 MONTHLY MTG			
303a Mtg. Inc.	4,489	4,750	95%
303b Sponsor	2,015	2,400	84%
303c Opportunity Drawing	330	400	83%
Total 303 MONTHLY MTG	6,834	7,550	91%
307 SYMPOSIUM			
307a Sponsors	2,685	25,500	11%
307b Booth	2,125	10,500	20%
307d Attendee	0	11,060	0%
307e Prog. Ads	0	250	0%
307f Other	0	500	0%
Total 307 SYMPOSIUM	4,810	47,810	10%
308 GOLF			
308a Player	487	25,000	2%
308c Tee	0	500	0%
308d Auction	0	5,000	0%
308e Mulligans, Raffle, Putting	0	6,500	0%
308f Sponsors	2,500	7,500	33%
308g Miscellaneous	0	1,080	0%
Total 308 GOLF	2,987	45,580	7%
313 MEDICARE SUMMIT			
313a Medicare Summit Inc	40,000	40,000	100%
Total 313 MEDICARE SUMMIT	40,000	40,000	100%
314 Corporate Partnership	0	950	0%
Total Income	56,731	144,840	39%
Gross Profit	56,731	144,840	39%
Expense			
403 MO. MEETING			
403a Facility	2,117	4,500	47%
403b Speakers	57	0	100%
403i Other	219	204	107%
Total 403 MO. MEETING	2,393	4,704	51%

INLAND EMPIRE ASSOC HEALTH UNDERWRITERS INC  
 Income & Expense Compared to Annual Budget  
 July 2025 through March 2026

	<u>Jul '25 - Mar 26</u>	<u>Budget</u>	<u>% of Budget</u>
407 SYMPOSIUM			
407b Site	1,725	22,808	8%
407d Spkr Fees	0	1,000	0%
407e Spkr Accom	0	300	0%
407f Prizes	0	1,000	0%
407g Printing	0	200	0%
407i Program	0	300	0%
407j Registration	0	1,100	0%
407k Other	0	800	0%
Total 407 SYMPOSIUM	1,725	27,508	6%
408 GOLF			
408a Facilities	0	9,600	0%
408b Meals & Drinks	0	9,500	0%
408c Awards	0	1,100	0%
408d Printing	0	100	0%
408f Prizes	150	750	20%
408g Other	0	1,190	0%
408h Charity	0	7,500	0%
Total 408 GOLF	150	29,740	1%
410 EXECUTIVE DIRECTOR			
410a Compensation	37,717	50,290	75%
Total 410 EXECUTIVE DIRECTOR	37,717	50,290	75%
412 EXEC. DIR. OFF. EXP.			
412a Postage	448	420	107%
412b Printing	239	0	100%
412d Telephone	342	450	76%
412e Misc. Office Exp.	5	0	100%
Total 412 EXEC. DIR. OFF. EXP.	1,034	870	119%
413 MEDICARE SUMMIT			
413a Medicare Summit Expenses	1,588	1,800	88%
Total 413 MEDICARE SUMMIT	1,588	1,800	88%
414 MEDIA			
414c Website	468	378	124%
Total 414 MEDIA	468	378	124%
416 BOARD			
416a Meeting	170	254	67%
416b Misc Board Exp	0	150	0%
Total 416 BOARD	170	404	42%
417 PRESIDENT			
417c CAHIP CAP Summit/SAC	0	650	0%
Total 417 PRESIDENT	0	650	0%

INLAND EMPIRE ASSOC HEALTH UNDERWRITERS INC  
 Income & Expense Compared to Annual Budget  
 July 2025 through March 2026

	<u>Jul '25 - Mar 26</u>	<u>Budget</u>	<u>% of Budget</u>
418 MEMBERSHIP			
418a Promotion	0	250	0%
Total 418 MEMBERSHIP	0	250	0%
419 LEGISLATION			
419b NABIP Capitol Conf/ DC	4,911	5,100	96%
419c CAHIP CAP Summit/SAC	0	5,000	0%
Total 419 LEGISLATION	4,911	10,100	49%
420 PROFESSIONAL FEES			
420a Annual Review/990	3,625	3,625	100%
420c D & O Insurance	1,974	1,939	102%
420d Liability Insurance	729	729	100%
Total 420 PROFESSIONAL FEES	6,328	6,293	101%
421 CONVENTIONS			
421a NABIP Annual Convention	59	5,770	1%
Total 421 CONVENTIONS	59	5,770	1%
422 PAC			
422a CAHIP-PAC	0	1,000	0%
422c NABIP-PAC	1,000	1,000	100%
Total 422 PAC	1,000	2,000	50%
424 CHARITY			
424a Charity	325	325	100%
Total 424 CHARITY	325	325	100%
425 EDUCATION			
425b DOI Fees	23		
Total 425 EDUCATION	23		
435 TREASURER			
435a Bookkeeping Service	5	5	105%
435b Office Expenses	1,049	1,049	100%
Total 435 TREASURER	1,054	1,054	100%
437 Credit Card Fees			
437d Stripe	5		
437e Square Up Inc.	20	700	3%
437f PayPal Fees	153	1,000	15%
437g Autobooks Fees	306	750	41%
Total 437 Credit Card Fees	483	2,450	20%

INLAND EMPIRE ASSOC HEALTH UNDERWRITERS INC  
Income & Expense Compared to Annual Budget  
July 2025 through March 2026

---

	<u>Jul '25 - Mar 26</u>	<u>Budget</u>	<u>% of Budget</u>
499 Contingency Fund	<u>0</u>	<u>254</u>	<u>0%</u>
Total Expense	<u>59,431</u>	<u>144,840</u>	<u>41%</u>
Net Ordinary Income	<u>-2,700</u>	<u>0</u>	<u>100%</u>
Net Income	<u><u>-2,700</u></u>	<u><u>0</u></u>	<u><u>100%</u></u>

04/01/26

## INLAND EMPIRE ASSOC HEALTH UNDERWRITERS INC

Income & Expense Comparison  
July 2025 through March 2026

	<u>Jul '25 - Mar 26</u>	<u>Jul '24 - Mar 25</u>
Ordinary Income/Expense		
Income		
301.1 CAHIP-IE Dues	2,100	1,927
303 MONTHLY MTG	6,834	6,995
307 SYMPOSIUM	4,810	5,150
308 GOLF	2,987	-675
313 MEDICARE SUMMIT	40,000	27,500
314 Corporate Partnership	0	1,041
319 OTHER INCOME	0	7,384
Total Income	<u>56,731</u>	<u>49,323</u>
Gross Profit	56,731	49,323
Expense		
403 MO. MEETING	2,393	3,345
407 SYMPOSIUM	1,725	5,650
408 GOLF	150	0
410 EXECUTIVE DIRECTOR	37,717	36,619
412 EXEC. DIR. OFF. EXP.	1,034	1,196
413 MEDICARE SUMMIT	1,588	1,756
414 MEDIA	468	378
416 BOARD	170	346
419 LEGISLATION	4,911	7,575
420 PROFESSIONAL FEES	6,328	5,919
421 CONVENTIONS	59	0
422 PAC	1,000	1,000
424 CHARITY	325	136
425 EDUCATION	23	0
435 TREASURER	1,054	804
437 Credit Card Fees	483	603
440 MISC/Special Events	0	10,380
Total Expense	<u>59,431</u>	<u>75,706</u>
Net Ordinary Income	<u>-2,700</u>	<u>-26,383</u>
Net Income	<u><u>-2,700</u></u>	<u><u>-26,383</u></u>

**INLAND EMPIRE ASSOC HEALTH UNDERWRITERS INC**

04/01/26

Transaction Detail by Account  
March 2026

Type	Date	Num	Name	Memo	Amount
<b>301.1 CAHIP-IE Dues</b>					
Deposit	03/23/2026	ACH	NABIP	Membership Dues - FEB ...	-303.93
Total 301.1 CAHIP-IE Dues					-303.93
<b>303 MONTHLY MTG</b>					
<b>303a Mtg. Inc.</b>					
Deposit	03/27/2026	PAYPAL	PAYPAL	February 19th 2026 Meeti...	-640.00
Deposit	03/30/2026	STRIPE	STRIPE	March 18th 2026 Member...	-105.00
Total 303a Mtg. Inc.					-745.00
<b>303b Sponsor</b>					
Deposit	03/10/2026	ACH	WORD & BROWN	April 9th Chapter Meeting ...	-400.00
Total 303b Sponsor					-400.00
Total 303 MONTHLY MTG					-1,145.00
<b>307 SYMPOSIUM</b>					
<b>307a Sponsors</b>					
Deposit	03/12/2026	121190	REGAL MEDICAL G...	2026 Symposium - Silver ...	-1,500.00
Total 307a Sponsors					-1,500.00
<b>307b Booth</b>					
Deposit	03/04/2026	ACH	HUMANA	2026 Symposium - Exhibit...	-725.31
Total 307b Booth					-725.31
Total 307 SYMPOSIUM					-2,225.31
<b>403 MO. MEETING</b>					
<b>403a Facility</b>					
Check	03/31/2026	5646	ALANDA DYER	MARCH 18th MEMBERS...	253.12
Total 403a Facility					253.12
<b>403i Other</b>					
Check	03/07/2026	ACH	ZOOM VIDEO COM...	Webinar/Video Conferenc...	16.99
Check	03/31/2026	5646	ALANDA DYER	CERTIFICATE HOLDERS...	53.69
Total 403i Other					70.68
Total 403 MO. MEETING					323.80
<b>410 EXECUTIVE DIRECTOR</b>					
<b>410a Compensation</b>					
Check	03/15/2026	5644	DAWN M CARROLL	Services Rendered 03.01....	2,095.42
Check	03/31/2026	5645	DAWN M CARROLL	Services Rendered 03.16....	2,095.42
Total 410a Compensation					4,190.84
Total 410 EXECUTIVE DIRECTOR					4,190.84
<b>412 EXEC. DIR. OFF. EXP.</b>					
<b>412d Telephone</b>					
Check	03/01/2026	ACH	ONEBOX	FEBRUARY 2026 Phone ...	39.62
Total 412d Telephone					39.62
Total 412 EXEC. DIR. OFF. EXP.					39.62

# INLAND EMPIRE ASSOC HEALTH UNDERWRITERS INC

04/01/26

Transaction Detail by Account  
March 2026

Type	Date	Num	Name	Memo	Amount
<b>419 LEGISLATION</b>					
<b>419b NABIP Capitol Conf/ DC</b>					
Check	03/02/2026	5642	ENRIQUE ROMERO	H. Romero - Registration f...	650.00
Check	03/02/2026	5642	ENRIQUE ROMERO	H. Romero - Hotel Stay fo...	1,200.09
Check	03/02/2026	5642	ENRIQUE ROMERO	H. Romero - Flight for 20...	649.59
Check	03/02/2026	5642	ENRIQUE ROMERO	H. Romero - Shuttles for ...	50.32
Check	03/02/2026	5643	RIVERSIDE COMM...	C. Powell - Registration	650.00
Check	03/02/2026	5643	RIVERSIDE COMM...	C. Powell - Airfare	511.40
Check	03/02/2026	5643	RIVERSIDE COMM...	C. Powell - Hotel (3 night ...	1,200.09
Total 419b NABIP Capitol Conf/ DC					4,911.49
Total 419 LEGISLATION					4,911.49
<b>421 CONVENTIONS</b>					
<b>421a NABIP Annual Convention</b>					
Check	03/02/2026	5643	RIVERSIDE COMM...	C. Powell - UBER (1 trips)	58.86
Total 421a NABIP Annual Convention					58.86
Total 421 CONVENTIONS					58.86
<b>425 EDUCATION</b>					
<b>425b DOI Fees</b>					
Check	03/17/2026	ACH	CAHIP-OC	Sircon Processing Fees f...	9.10
Total 425b DOI Fees					9.10
Total 425 EDUCATION					9.10
<b>437 Credit Card Fees</b>					
<b>437d Stripe</b>					
Deposit	03/30/2026	STRIPE	STRIPE	FEES - March 18 2026 M...	4.87
Total 437d Stripe					4.87
<b>437f PayPal Fees</b>					
Deposit	03/27/2026	PAYPAL	PAYPAL	Fees - Feb 19 2026 Meeti...	29.68
Total 437f PayPal Fees					29.68
Total 437 Credit Card Fees					34.55
<b>TOTAL</b>					<b>5,894.02</b>