



Year in Review:  
Annual Report  
July 2016 – March 2017

# Year in Review: Annual Report, 2016-17



Under the presidency of Phil Lee, and the board of directors listed below, the Golden Gate Association of Health Underwriters ("GGAHU"), which is an local chapter of the state association (CAHU), and national organization headquarters in Washington, DC, (NAHU), continued its growth as an award winning chapter.

President *	Philip Lee	Lee Health Insurance Services
President Elect *	Cathy Little	Essential Exchange Insurance
Past President*	John Helms	John Helms & Associates
Secretary *	John Fisher	Paylocity
Treasurer *	Janine Wilson	HealthEquity
Legislation/Media	Patrick Burns	Burns Employee Benefits
PAC/HUPAC	Hazel Bright	HB Resources Insurance
Membership - Retention	Sue Wakamoto-Lee	Limelight Health
Membership - New	Patrick Hennessy	Beere & Purves
Foundation	Linda Rose Koehler	Herzog Insurance Agency
Communications	Jonathan Greer	Rockridge Health Insurance
Awards & Recognition	Casey Stratmeyer	Payroll Systems
Hospitality	Maria Leimbach	Word & Brown
Member-At-Large	Mitzy Russom	Rogers Benefit Group

*\* Executive Committee*

GGAHU's leadership has taken a deliberate approach focused on succession planning, committee format, accountability and transparency. These objectives are all driven by our common purpose – to be advocates for our members and their clients, to be a valuable resource and to be a place of camaraderie for our members.

Due to our emphasis on thoughtful succession planning, the new board that was sworn in on July 20<sup>th</sup>, 2016 by CAHU President Rick Coburn, is exceptionally strong and off to a great start. We look forward to another record-breaking year and will report back again this time next year.

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**NAHU CHAPTER AWARDS**

- Pacesetter Award (chapter award)

**NAHU DISTINCTIONS**

- Earned NAHU Gold Certification for the past three years consecutively.
- Four Leading Producer Round Table Qualifiers (LPRT):
  1. Philip Lee – Leading Producer
  2. John Helms – Leading Producer
  3. Hazel Bright – Leading Producer
  4. Linda Rose Koehler – Leading Producer



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## **SPECIAL EVENTS**

- 13 board members attended the NAHU Annual Convention in Albuquerque, NM in June 2016.
- 7 board members attended the CAHU Health Summit in October.
- 7 board members attended the NAHU Region 8 Leadership Training in Irvine in August 2016.
- 15 GGAHU members travelled to Washington DC for NAHU's largest ever Capital Conference in February 2017.
- Annual Sales Symposium at Crowne Plaza, Concord in September 2016 and another planned for May 2017.
- Annual Golf Tournament at Oakhurst Country Club in May 2016 and planning again for September 2017.
- Co-hosted Medicare Summit with two other chapters.
- NAHU Live video webcast on the elections outcome with Janet Trautwein in December 2016 garnered one of the largest member turnouts of any event held all year with the exception of our Annual Sales Symposium.
- Our Foundation chair Linda Rose Koehler was recognized at a PKD gala held to honor individuals outstanding contributions to bring greater public awareness of this devastating disease.

## **MEDIA & PUBLIC RELATIONS**

- Press release on our Technology Initiative was published in HIU Magazine (June 2016)
- Actively participated on social media platforms including Facebook (70 Likes), LinkedIn (288 Members), and Twitter (74 Followers).

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## **LEGISLATIVE AFFAIRS**

- NAHU Capitol Conference in Washington, DC (Feb, 2017)
  - 15 GGAHU Members attended, 8 of which are sitting board members.
  - 6 Legislator Meetings
- CAHU Capitol Summit in Sacramento (May 9-10, 2017)
  - 6 board members will attend from our chapter
- Board members Phil Lee and John Helms attended a fundraiser for Catharine Baker in Blackhawk. Ms. Baker is one of only a few Republicans to hold onto her seat in the November 2016 elections, supported by CAHU PAC.
- As part of the CAHU Adopt a Leg. Program, GGAHU members Phil Lee and John Helms attended multiple town hall meetings featuring the bi-partisan duo of Assemblywoman Catharine Baker and Senator Steven Glazer.

## **POLITICAL ACTION**

- In addition to individual member donations throughout the year, GGAHU donated both to HUPAC (national) and CAHU PAC (state) in the amounts of \$1,000 and \$4,000, respectively.

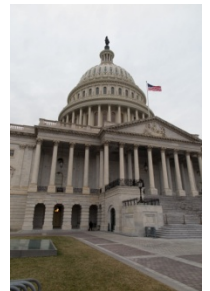
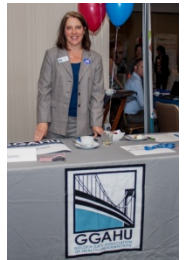
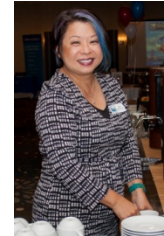
## **PROFESSIONAL DEVELOPMENT**

- Annual Sales Symposium in September, 2016, featuring NAHU CEO Janet Trautwein, NAHU Immediate Past-President Donald Goldmann as well as a special mini town hall visit from Assemblywoman Catharine Baker, (R) 16<sup>th</sup> District.
- Annual Sales Symposium this year will be held on May 18<sup>th</sup>, 2017
- Monthly member meetings focusing on helping brokers grow and retain clients in the changing benefit landscape.
- Donated \$1,000 to NAHU Education Foundation

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## ADDITIONAL MOMENTS FROM THE PAST YEAR



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## CONTACT US

GGAHU  
2520 Venture Oaks Way  
Suite 150  
Sacramento, CA 95833  
[www.ggahu.org](http://www.ggahu.org)  
E-mail: [info@ggahu.com](mailto:info@ggahu.com)  
Toll Free: 1-800-488-2506