

The EAOC Weekly

August 30, 2023



WITH 12 REPORTING, EAOC MEMBERS HAD \$51,573,300 IN TOTAL SALES IN 2022.

The EAOC Weekly

THE FOUR PARTS OF ESTATE PLANNING WITH TRACY ROBERTS

In this week's morning meeting, our EAOC members were treated to one of the many benefits of membership: a legal update that is helpful for everyone!

Longtime EAOC member and Estate Planning

Attorney Tracy Roberts explained exactly what estate planning is generally meant to achieve, which is to keep loved ones out of probate court if the unthinkable happens. Estate planning also identifies goals for who will take your assets after your death, and creates a set of documents meant to carry out those objectives, which can make things tremendously easier for loved ones.



**TO SUCCEED IN
BUSINESS IT'S NOT
WHAT
YOU KNOW BUT
WHO
YOU KNOW THAT
COUNTS MOST!**

UPCOMING SPEAKER SCHEDULE

SEPTEMBER 6TH, 2023

NO MEETING—Happy Labor Day!

SEPTEMBER 13TH, 2023

Ron Dymek with Dymek's Freedom Plumbing



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Tracy also presented on the documents that make up an estate plan:

1. A revocable or “living” trust
2. “Funding” the trust
3. A “pour-over” will
4. A durable power of attorney for assets
5. An Advance Health Care Directive
6. Nomination of guardians for minor children

While some people might believe they don’t need to think about estate planning at their age or income level, they’re wrong. Anyone who lives in California most likely needs an estate plan. Even if a will was created in the past, tax laws may have changed, and there may be exposure that could land loved ones in probate court. If in doubt, give Tracy a call and make sure your assets are protected.

To learn more about protecting yourself and your loved ones, please call Tracy at 562.340.6277.



MEMBERSHIP MOMENT

Hello EAOC'rs

With Labor Day upon us and no meeting schedule for Wednesday the 6th of September, please take this time to plan a visit/lunch/coffee with one of our members. A great way to get to know another member on a more personal basis.

Meet up with one of our newer members, help them feel welcomed to our organization and get to know them sooner rather than waiting for their presentation.

Or.....

Seek out someone that may be a power partner to you and create a plan for the two of you to do a marketing plan together. Search out your client database and see if this power partner can be of assistance to your clients, and vice versa.

See you September 13th with a great share of who you spent your Labor Day with. I can't wait to hear the stories.

Happy Labor Day!

Gizi

Gizi Clemmer

Membership Lead

First Team Real Estate



NEW MEMBER RECRUITMENT BONUS

Reminder: EAOC proudly encourages its members in expanding and empowering their fellow prestigious Orange County execs!

More quality members means more quality referrals.

An EAOC sponsor receives a \$150 bonus for recruiting a new EAOC team member, after three months of successful membership.

***Please contact
Katie for more
information!***



SEPTEMBER CELEBRATIONS

HAPPY EAOC ANNIVERSARY

5 YRS—Ron Dymek
Dymek's Freedom Plumbing

BIRTHDAY BONANZA

9/2—Dan Tatum
Eberhardt's Tire & Automotive

5 YRS—Tracy Roberts
Law Office of Tracy J. Roberts

9/5—Carlos Salazar
Salazar Associates

4 YRS—Gizi Clemmer
FirstTeam Real Estate

9/30—Jonathan Judge
*Atkinson, Andelson, Loya, Ruud
& Romo*

2 YRS—Yon Himelman
ATOMY

WEDDING ANNIVERSARIES

9/11—Bill & Candi Cecil
Merrill Lynch

9/17—Gizi & Gordon Clemmer
FirstTeam Real Estate

9/24—Dan & Alison Tatum
Eberhardt's Tire & Automotive

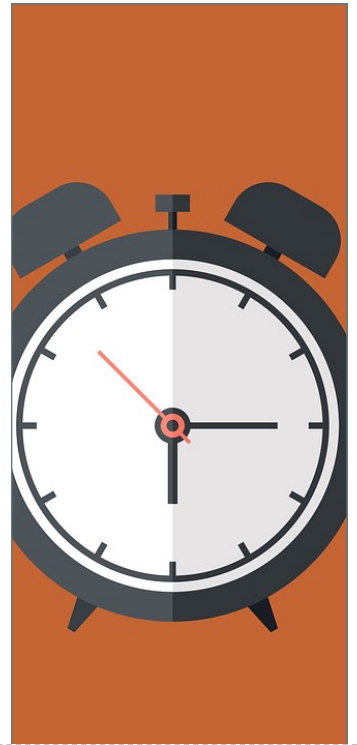
Please Note: If the 'Celebration Information' above is incorrect or missing, please email the correct information to the EAOC office immediately.

GOOD MORNING EAOC!

EAOC MEMBERS: Meetings will now begin promptly at 7:00 am, with breakfast served at 6:45 am.

We encourage you to arrive early to catch up with your fellow teammates before the meeting begins.

We look forward to seeing you!



THOUGHT OF THE WEEK

“Change before you have to.”

- Jack Welch, Former CEO of General Electric

WELCOME ABOARD!

Please join us in welcoming our newest EAOC member!

Carlos Camacho Gil

Federated Insurance

Serving Fullerton, Anaheim, Placentia, Buena Park,
and Orange

phone: 562.447.3972

Classification: Commercial Insurance

Sponsor: Ron Dymek



Target Classification of the Month: **Physical Therapist**



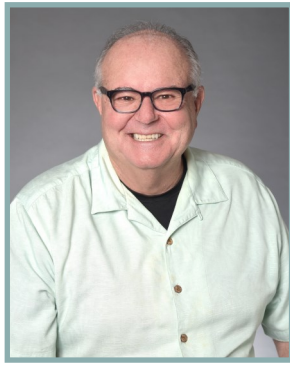
Calling all Physical Therapists!

EAOB members: we are actively seeking a qualified, trusted, tried and true Physical Therapist to fill our Target Classification of the Month.

Please consider your entire network, and invite your favorite Physical Therapist to breakfast next week!

Email Katie to get them on our guest list.

Thank you!



PRESIDENT'S MESSAGE

Hello EAOC!

Thank you to Gizi Clemmer for standing in for me for the last two weeks. From what I could see and hear from Zoom Land, we had a great turnout for the last meeting of August. We are dark next Wednesday for Labor Day, and will see everyone I hope on September the 13th for my plumbing presentation.

Also, thank you to Tracy Roberts for a very informative presentation on the benefits of a Living Trust, and the downside of having a Will or not being prepared at all. Do you want the State of California deciding how your estate is settled? Call Tracy today for a free meeting evaluation.

Stay tuned for the details on our October Green Parrot Villa EAOC gathering. I'm hearing from a good source that we will be hosting a member's brunch on October the 22nd.

We welcomed our newest member, Carlos Camacho Gil from Federated Insurance this week. Carlos is our new trusted Commercial Insurance Broker. Please reach out and introduce yourself, if you haven't already met in person.

I hope everyone will enjoy a safe and relaxing Labor Day weekend.

- Ron

Ron Dymek

DYMEK'S FREEDOM PLUMBING
EAOC 2022-2023 President



NEW MEMBER TARGETING

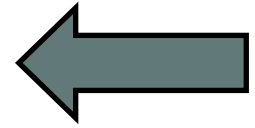
We are actively seeking new members in the following classifications:

- Chiropractor
- Long-Term Care
- Pastry Chef
- Window Washing
- **Solar Panels**
- Wifi Expert
- Vinyl Fencing
- Acupuncture
- Dry Cleaning

Please email Katie for more details!



EAOC QUICK LINKS

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