

# Agenda

# 2025 AACBNC Business Meeting

## Date, Time & Location of Meeting

January 17, 2025 • 11:30AM Local Time • Union Room 2&3

## Expected Attendees

Robling (President) • Executive Committee • Membership

## Order of Business

1. Approval of minutes of January 26th, 2024 Business meeting
2. Review of Current office holders

President: Alex Robling (2023-25, terms ends 2025 meeting)  
President-elect: Gary Bassell (2023-25, will run 2026 meeting)  
Past President: Rick Sumner (2023-2025)  
Secretary-Treasurer: Raj Ettarh\* (2023-2026)

Councilors:  
Wendy Macklin\* • David Morton (2023-2025)  
Kirk McHugh • Douglas Gould (2022-2024)  
Representative CFAS: Jeff Laitman\* (2023-2026)

*\*Second term*

### **In-coming office holders**

President: Gary Bassell (2025-27)  
President-elect: Kirk McHugh (2025-27, will run program 2026 & 2027 meetings)  
Past President: Alex Robling (2025-2027)  
Secretary-Treasurer: Raj Ettarh\* (2023-2026)

### **Councilors**

Douglas Gould (2024-2026) • Wendy Macklin • David Morton (2025-2027)  
Carmen Canavier • Ken Kramer (2025-2027)  
Representative CFAS: Jeff Laitman\* (2023-2026)

3. **President's Report and Announcements (Robling).**
  - a. FASEB Hill Day 2024 (Sumner)
  - b. CFAS Rep report (Laitman)
  - c. Memberships: (Robling) – AAMC/CFAS, Research!America? Annual renewal
  - d. Sign-on letters. No sign-on requests were received during the year
4. **Nominating committee and elections (Robling):** elections for president-elect and councilors on the Executive Committee were held late in November 2024. McHugh was duly elected as president-elect. Carmen Canavier and Ken Kramer were duly elected to serve as councilors.
5. **Greetings from AAA:** (Robling) – from Martine Dunnwald (AAA President) Christine Ross (AAA Executive Director)
6. **New Chairs**
7. **Candidates for Emeritus Membership Status:** (Robling) – none
8. **In memoriam**
9. **Auditors' Report:** (Robling) auditors for 2024 financial accounts
10. **Financial Report:** (Ettarh) - see pages below
11. **Proposed Budget:** (Ettarh) - see pages below
12. **Membership & Asset history:** (Ettarh) - see pages below

13. Other Business: (Robling)

# Minutes

# 2024 AACBNC Business Meeting

## Date, Time & Location of Meeting

**January 26, 2024 • 11:30AM Atlantic Time • Saba Room**

Robling (President) started the meeting 11:50AM Atlantic Time. Members were reminded that agenda and documentation is on the AACBNC website.

## Order of Business

1. **Approval of minutes** – The March 17th, 2023 business meeting minutes were approved unanimously
2. **Current office holders**

President: Alex Robling (2023-25, terms ends 2025 meeting)  
President-elect: Gary Bassell (2023-25, will run 2026 meeting)  
Past President: Rick Sumner (2023-2025)  
Secretary-Treasurer: Raj Ettarh\* (2023-2026)

Councilors  
Wendy Macklin\* • David Morton (2023-2025)  
Kirk McHugh • Douglas Gould (2022-2024)  
Representative CFAS: Jeff Laitman\* (2023-2026)

*\*Second term*

### **In-coming office holders**

Councilors  
Kirk McHugh • Douglas Gould (2024-2026)

3. **President's Report and Announcements (Robling):**
  - a. FASEB Hill Day 2023 (Sumner) – No report for Hill Day in 2023.
  - b. CFAS Rep report (Laitman) – Laitman presented a report that outlined the 2023 CFAS Connect and Annual meetings which were mostly online/virtual, and provided updates for upcoming 2024 meetings. The 2023 annual CFAS meeting date conflicted with the 2023 AAA meeting, so AACBNC was not represented at the 2023 annual CFAS meeting.
  - c. Memberships: (Robling) – AAMC/CFAS, Research!America – Annual renewal. Exec Committee approved renewal of subscriptions to Research!America and AAMC/CFAS for the year. This item was approved for inclusion on the Business meeting agenda for vote by membership.
  - d. Sign-on letter – No sign-on requests were received during the year.
4. **Nominating committee & Elections (Robling):** Robling announced the outcomes of the elections of councilors to the Executive Committee that were held in November 2023. He welcomed Kirk McHugh and Douglas Gould who were duly elected to serve second terms.
5. **Greetings from AAA (Robling)** – Martine Dunnwald (AAA President) Christine Ross (AAA Executive Director) presented some of the initiatives that AAA is engaged in and planning for 2024.
6. **New Chairs (Robling)** – First time attendees and new chairs present at the meeting presented themselves briefly to membership: William Albabish (Cleveland Clinic Lerner CoM), Carmen Canavier (LSU)
7. **Candidates for Emeritus status (Robling):** Candidates for emeritus status were approved by membership.
  - a. Carol Gregorio (U Arizona)
  - b. Sylvia Smith (Augusta U)
8. **In memoriam:** None.
9. **Auditors' Report:** (Robling) – Membership approved the nomination of Doug Gould and William Albabish by Robling to audit the 2023 financial accounts.

10. **Financial Report:** (Ettarh) – The 2023 financial accounts were circulated ahead of the meeting, discussed and approved by membership.
11. **Proposed Budget:** (Ettarh) – The proposed budget for 2024 was circulated ahead of the meeting, discussed and approved by membership.
12. **Membership & Asset history:** (Ettarh) – The asset history was presented and discussed with the budget..
13. **Other Business**
  - a. Ettarh presented the updates to the website requested by members since the 2023 meeting: credit card payments, list of meeting attendees and members.
  - b. McHugh introduced discussion on the future of the association, how membership and engagement could be improved and increased, as well as the process for a potential change in name of the association.
  - c. Canavier introduced discussion on standardizing a common approach to donor collections across the country. Consensus was to coalesce discussion among already active groups in Louisiana, New York and the AAA to move forward.

### Closing

Meeting ended at 12:56PM Atlantic Time. Minutes submitted by R. Ettarh on 1/26/2024.

Itemized Expenses & Revenue CY 24

Date of transaction	Entered by	Method of payment	Check #	Category	Description	Revenue amount - incoming	Disbursement amount - outgoing	Chase Bank Statement	Reconciled with Chase Bank Statement	Account Balance	
Category:						Sum:	Sum:	Sum:			
▼ Opening Account Balance						0	0	\$63450.61			
1/1/24				Opening Account Balance	Total Opening Chase Accounts Balance - 1/1/24			\$63450.61		\$63450.61	
1/1/24				Opening Account Balance	Opening Chase Savings Account Balance - 1/1/24					\$15095.14	
1/1/24				Opening Account Balance	Opening Chase Checking Account Balance - 1/1/24					\$48355.47	
▼ Membership Dues						\$12890.56	0	\$12890.56			
1/2/24	Raj	Wix Payments		Membership Dues	Dues	David Morton annual membership	\$460.92	\$460.92	OK	\$48816.39	
1/19/24	Raj	Wix Payments		Membership Dues	Dues	Peter Kondrashov annual membership	\$460.92	\$460.92	OK	\$49277.31	Appears as \$145.65 debit on bank statement
1/19/24	Raj	Chase Debit		Membership Dues	Dues	William Albabish annual membership	\$460.92	\$460.92	OK	\$49738.23	
5/28/24	Raj	Wix Payments		Membership Dues	Dues	Membership Kenneth Kramer	\$460.92	\$460.92	OK	\$50199.15	
6/4/24	Raj	Wix Payments		Membership Dues	Dues	Membership Douglas Gould	\$460.92	\$460.92	OK	\$50660.07	
6/27/24	Raj	Wix Payments		Membership Dues	Dues	Membership Elizabeth McKenna	\$460.92	\$460.92	OK	\$51120.99	
7/2/24	Raj	Wix Payments		Membership Dues	Dues	Membership David Piston	\$460.92	\$460.92	OK	\$51581.91	
7/3/24	Raj	Wix Payments		Membership Dues	Dues	Membership Jeff Laitman (Amex card)	\$457.12	\$457.12	OK	\$52039.03	
7/8/24	Raj	Wix Payments		Membership Dues	Dues	Membership Kirk McHugh	\$460.92	\$460.92	OK	\$52499.95	
7/11/24	Raj	Wix Payments		Membership Dues	Dues	Membership Kevin McCarthy	\$460.92	\$460.92	OK	\$52960.87	
7/12/24	Raj	Wix Payments		Membership Dues	Dues	Membership Alexander Robling	\$460.92	\$460.92	OK	\$53421.79	
7/18/24	Raj	Wix Payments		Membership Dues	Dues	Membership John Martin (Amex card)	\$457.12	\$457.12	OK	\$53878.91	
8/26/24	Raj	Wix Payments		Membership Dues	Meeting 2025	Membership Teresita Bellido	\$460.92	\$460.92	OK	\$54339.83	
8/28/24	Raj	Wix Payments		Membership Dues	Meeting 2025	Membership Pamela Knapp	\$460.92	\$460.92	OK	\$54800.75	
9/3/24	Raj	Wix Payments		Membership Dues	Dues	Membership Carmen Canavier	\$460.92	\$460.92	OK	\$55261.67	
9/4/24	Raj	Wix Payments		Membership Dues	Dues	Membership Paul Drew	\$460.92	\$460.92	OK	\$55722.59	
9/16/24	Raj	Wix Payments		Membership Dues	Dues	Membership Kenneth Kramer	\$460.92	\$460.92	OK	\$56183.51	
9/18/24	Raj	Wix Payments		Membership Dues	Dues	Membership Rick Sumner	\$460.92	\$460.92	OK	\$56644.43	
10/3/24	Raj	Wix Payments		Membership Dues	Dues	Membership Barry Waterhouse	\$460.92	\$460.92	OK	\$57105.35	
10/7/24	Raj	Wix Payments		Membership Dues	Dues	Membership William Albabish	\$460.92	\$460.92	OK	\$57566.27	
10/28/24	Raj	Wix Payments		Membership Dues	Dues	Membership Steven Popoff	\$460.92	\$460.92	OK	\$58027.19	
10/28/24	Raj	Wix Payments		Membership Dues	Dues	Membership Maria Serrat	\$460.92	\$460.92	OK	\$58488.11	
11/4/24	Raj	Wix Payments		Membership Dues	Dues	Membership Joy Balta	\$460.92	\$460.92	OK	\$58949.03	
11/4/24	Raj	Wix Payments		Membership Dues	Dues	Membership Peter Kondrashov AMEX	\$457.12	\$457.12	OK	\$59406.15	
11/5/24	Raj	Wix Payments		Membership Dues	Dues	Membership Wendy Macklin	\$460.92	\$460.92	OK	\$59867.07	
11/6/24	Raj	Wix Payments		Membership Dues	Dues	Membership Grace Stutzmann	\$460.92	\$460.92	OK	\$60327.99	
11/6/24	Raj	Wix Payments		Membership Dues	Dues	Membership David Morton AMEX	\$457.12	\$457.12	OK	\$60785.11	

	Date of transaction	Entered by	Method of payment	Check #	Category	Description	Revenue amount - incoming	Disbursement amount - outgoing	Chase Bank Statement	Reconciled with Chase Bank Statement	Account Balance	
	12/4/24	Raj	Wix Payments		Membership Dues	Dues	Membership William Frost	\$460.92		\$460.92	OK	\$61246.03
<b>▼ Meetings</b>							<b>\$24388.89</b>	<b>\$70117.85</b>	<b>\$94506.74</b>			
	1/1/24	Raj	Wix Payments		Meetings	Meeting 2024	Jason Malley meeting registration	\$606.57		\$606.57	OK	\$61852.60
	1/2/24	Raj	Wix Payments		Meetings	Meeting 2024	Larry Kennedy Sponsor guest registration	\$388.10		\$388.10	OK	\$62240.70
	1/2/24	Raj	Wix Payments		Meetings	Meeting 2024	Larry Kennedy Sponsor guest registration for Barbara Kennedy	\$388.10		\$388.10	OK	\$62628.80
	1/3/24	Raj	Chase Debit		Meetings	Meeting 2024	Airport transportation St. Kitts Sunlinc		\$128.00	\$128.00	OK	\$62500.80
	1/3/24	Raj	Chase Debit		Meetings	Meeting 2024	Margaret McNulty guest registration	\$388.10		\$388.10	OK	\$62888.90
	1/3/24	Raj	Chase Debit		Meetings	Meeting 2024	Danielle Royer meeting registration	\$606.57		\$606.57	OK	\$63495.47
	1/4/24	Raj	Wix Payments		Meetings	Meeting 2024	John Bethea meeting registration (Siobhan Hanna)	\$606.57		\$606.57	OK	\$64102.04
	1/4/24	Raj	Wix Payments		Meetings	Meeting 2024	John Bethea guest registration	\$388.10		\$388.10	OK	\$64490.14
	1/19/24	Raj	Chase Debit		Meetings	Meeting 2024	William Albabish meeting registration	\$606.57		\$606.57	OK	\$65096.71
	1/20/24	Raj	Chase Debit		Meetings	Meeting 2024	Miami Internal Airport Hotel reservation outbound, Raj		\$246.21	\$246.21	OK	\$64850.50
	1/25/24	Raj	Chase Debit		Meetings	Meeting 2024	Gift for Andrew Hotel Mgr St Kitts		\$52.00	\$52.00	OK	\$64798.50
	1/25/24	Raj	Chase Debit		Meetings	Meeting 2024	Dinner with AACBNC President, St Kitts		\$64.00	\$64.00	OK	\$64734.50
	1/27/24	Raj	Chase Debit		Meetings	Meeting 2024	Miami Internal Airport Hotel reservation returning, America		\$224.87	\$224.87	OK	\$64509.63
	1/27/24	Raj	Chase Debit		Meetings	Meeting 2024	Dinner America + Raj, Miami airport		\$100.12	\$100.12	OK	\$64409.51
	2/3/24	Raj	Check		Meetings	Meeting 2024	Hotel and travel reimbursement check Derek Harmon (speaker)		\$2010.54	\$2010.54	OK	\$62398.97
	2/3/24	Raj	Check		Meetings	Meeting 2024	Hotel and travel reimbursement check Margaret McNulty (speaker)		\$2149.54	\$2149.54	OK	\$60249.43
	2/6/24	Raj	Check		Meetings	Meeting 2024	Hotel and travel reimbursement check Jesse Spencer-Smith (speaker)		\$1816.63	\$1816.63	OK	\$58432.80
	2/8/24	Raj	Check		Meetings	Meeting 2024	Hotel and travel Lela Giannaris (speaker)		\$2112.86	\$2112.86	OK	\$56319.94
	2/16/24	Raj			Meetings	Meeting 2024	Refund from St. Kitts, final bill reconciliation - wire	\$614.84		\$614.84	OK	\$56934.78
	2/20/24	Raj	Check		Meetings	Meeting 2024	Hotel and travel reimbursement check Yaa Kumah-Crystal (speaker)		\$1810.31	\$1810.31	OK	\$55124.47
	3/14/24	Raj	Wire		Meetings	Meeting 2025	Deposit #1 2025 Meeting		\$5000.00	\$5000.00	OK	\$50124.47
	6/5/24	Raj	Wix Payments		Meetings	Meeting 2025	Meeting registration Christine Ross	\$703.67		\$703.67	OK	\$50828.14
	6/27/24	Raj	Wix Payments		Meetings	Meeting 2025	Meeting registration Lynne Opperman	\$388.10		\$388.10	OK	\$51216.24
	6/27/24	Raj	Wix Payments		Meetings	Meeting 2025	Meeting guest registration Lynne Opperman	\$388.10		\$388.10	OK	\$51604.34
	7/2/24	Raj	Wix Payments		Meetings	Meeting 2025	Meeting registration Douglas Gould	\$703.67		\$703.67	OK	\$52308.01
	8/1/24	Raj	Chase Debit		Meetings	Meeting 2026	Expedia travel insurance site visit		\$43.57	\$43.57	OK	\$52264.44
	8/2/24	Raj	Chase Debit		Meetings	Meeting 2026	Alaska Air Flight site visit		\$461.53	\$461.53	OK	\$51802.91
	8/19/24	Raj	Wire		Meetings	Meeting 2025	Deposit #2 2025 Meeting		\$10000.00	\$10000.00	OK	\$41802.91
	8/20/24	Raj	Chase Debit		Meetings	Meeting 2026	United Flight site visit		\$800.51	\$800.51	OK	\$41002.40

	Date of transaction	Entered by	Method of payment	Check #	Category	Description	Revenue amount - incoming	Disbursement amount - outgoing	Chase Bank Statement	Reconciled with Chase Bank Statement	Account Balance
		Raj	Wix Payments		Meetings	Meeting 2025 Meeting Registration Rick Sumner, Judy Welk	\$1091.77		\$1091.77	OK	\$42094.17
	9/9/24	Raj	Chase Debit		Meetings	Meeting 2026 Site Visit 2025 — EGz Hotel		\$123.42	\$123.42	OK	\$41970.75
	9/9/24	Raj	Chase Debit		Meetings	Meeting 2026 Site Visit 2025 — EGz Hotel		\$3.04	\$3.04	OK	\$41967.71
	9/9/24	Raj	Chase Debit		Meetings	Meeting 2026 Site Visit 2025 — EGz Hotel		\$61.71	\$61.71	OK	\$41906.00
	9/9/24	Raj	Chase Debit		Meetings	Meeting 2026 Site Visit 2025 — EGz Hotel forex adjustment		\$1.85	\$1.85	OK	\$41904.15
	9/9/24	Raj	Chase Debit		Meetings	Meeting 2026 Site Visit 2025 — EGz Hotel forex adjustment		\$0.09	\$0.09	OK	\$41904.06
	9/10/24	Raj	Chase Debit		Meetings	Meeting 2026 Site Visit 2025 — HaC Hotel		\$47.84	\$47.84	OK	\$41856.22
	9/10/24	Raj	Chase Debit		Meetings	Meeting 2026 Site Visit 2025 — HaC Hotel forex adjustment		\$1.43	\$1.43	OK	\$41854.79
	9/23/24	Raj	Wix Payments		Meetings	Meeting 2025 Membership Carmen Canavier + Guest	\$1091.77		\$1091.77	OK	\$42946.56
	10/2/24	Raj	Wix Payments		Meetings	Meeting 2025 John Bethea meeting registration (Siobhan Hanna)	\$703.67		\$703.67	OK	\$43650.23
	10/7/24	Raj	Wix Payments		Meetings	Meeting 2025 Kirk McHugh meeting registration	\$703.67		\$703.67	OK	\$44353.90
	10/7/24	Raj	Wix Payments		Meetings	Meeting 2025 Kirk McHugh guest meeting registration	\$388.10		\$388.10	OK	\$44742.00
	10/15/24	Raj	Wix Payments		Meetings	Meeting 2025 James Cray guest meeting registration	\$388.10		\$388.10	OK	\$45130.10
	10/18/24	Raj	Wix Payments		Meetings	Meeting 2025 Gary Bassell meeting registration	\$703.67		\$703.67	OK	\$45833.77
	10/28/24	Raj	Wix Payments		Meetings	Meeting 2025 WIX Refund fee — Maria Serrat wrong card payment		\$14.08	\$14.08	OK	\$45819.69
	10/30/24	Raj	Wix Payments		Meetings	Meeting 2025 Alex Robling meeting registration	\$703.67		\$703.67	OK	\$46523.36
	11/4/24	Raj	Wix Payments		Meetings	Meeting 2025 David Morton meeting registration AMEX	\$697.87		\$697.87	OK	\$47221.23
	11/4/24	Raj	Wix Payments		Meetings	Meeting 2025 David Morton guest meeting registration AMEX	\$384.90		\$384.90	OK	\$47606.13
	11/4/24	Raj	Wix Payments		Meetings	Meeting 2025 Jeff Laitman meeting registration AMEX	\$697.87		\$697.87	OK	\$48304.00
	11/4/24	Raj	Wix Payments		Meetings	Meeting 2025 Jeff Laitman guest meeting registration AMEX	\$384.90		\$384.90	OK	\$48688.90
	11/4/24	Raj	Wix Payments		Meetings	Meeting 2025 Peter Kondrashov meeting registration AMEX	\$697.87		\$697.87	OK	\$49386.77
	11/5/24	Raj	Chase Debit		Meetings	Meeting 2025 Flight America to CR + seats/insurance		\$1161.16	\$1161.16	OK	\$48225.61
	11/5/24	Raj	Wix Payments		Meetings	Meeting 2025 Wendy Macklin meeting registration	\$703.67		\$703.67	OK	\$48929.28
	11/6/24	Raj	Wix Payments		Meetings	Meeting 2025 Grace Stutzmann meeting registration	\$703.67		\$703.67	OK	\$49632.95
	11/13/24	Raj	Wix Payments		Meetings	Meeting 2025 Pamela Knapp meeting registration	\$703.67		\$703.67	OK	\$50336.62
	11/18/24	Raj	Wix Payments		Meetings	Meeting 2025 Mira Krendel meeting registration	\$703.67		\$703.67	OK	\$51040.29
	11/25/24	Raj	Wire		Meetings	Meeting 2026 First Deposit Payment Hac. Marriott		\$5000.00	\$5000.00	OK	\$46040.29
	11/25/24	Raj	Wix Payments		Meetings	Meeting 2025 Martine Dunwald meeting registration	\$703.67		\$703.67	OK	\$46743.96
	11/29/24	Raj	Wix Payments		Meetings	Meeting 2025 Margaret McNulty meeting registration	\$703.67		\$703.67	OK	\$47447.63
	12/4/24	Raj	Wix Payments		Meetings	Meeting 2025 William Frost meeting registration	\$703.67		\$703.67	OK	\$48151.30
	12/7/24	Raj	Wix Payments		Meetings	Meeting 2025 Scott Brady emeritus mtg registration	\$388.10		\$388.10	OK	\$48539.40
	12/10/24	Raj	Wix Payments		Meetings	Meeting 2025 Ken Kramer meeting registration	\$703.67		\$703.67	OK	\$49243.07

Date of transaction	Entered by	Method of payment	Check #	Category	Description	Revenue amount - incoming	Disbursement amount - outgoing	Chase Bank Statement	Reconciled with Chase Bank Statement	Account Balance
12/10/24	Raj	Wix Payments		Meetings	Meeting 2025 Ken Kramer guest mtg registration	\$388.10		\$388.10	OK	\$49631.17
12/12/24	Raj	Wix Payments		Meetings	Meeting 2025 Kevin McCarthy meeting registration	\$703.67		\$703.67	OK	\$50334.84
12/16/24	Raj	Wix Payments		Meetings	Meeting 2025 Graham Whiteside guest mtg registration AMEX	\$384.90		\$384.90	OK	\$50719.74
12/19/24	Raj	Wix Payments		Meetings	Meeting 2025 Kevin McCarthy guest mtg registration	\$388.10		\$388.10	OK	\$51107.84
12/20/24	Raj	Wix Payments		Meetings	Meeting 2025 Chakravarthy Sadacharan mtg registration	\$703.67		\$703.67	OK	\$51811.51
12/20/24	Raj	Wix Payments		Meetings	Meeting 2025 Christine Ross guest mtg registration	\$388.10		\$388.10	OK	\$52199.61
12/18/24	Raj	Wire		Meetings	Meeting 2025 Final Deposit Payment 2025 Meeting		\$11318.80	\$11318.80	OK	\$40880.81
1/18/24	Raj	ACH		Meetings	Meeting 2024 Final Deposit – wire		\$25363.74	\$25363.74	OK	\$15517.07
<b>▼ Sponsors &amp; Ads</b>						<b>\$12400.42</b>	<b>0</b>	<b>\$12400.42</b>		
7/16/24	Raj	Wix Payments		Sponsors & Ads	Meeting 2025 Graham Whiteside Anat Excellence	\$3370.20		\$3370.20	OK	\$18887.27
7/30/24	Raj	Wix Payments		Sponsors & Ads	Meeting 2025 Tracy Tang Anatomage	\$3370.20		\$3370.20	OK	\$22257.47
11/19/24	Raj	Wix Payments		Sponsors & Ads	Meeting 2025 Sponsor Greg Spitzer [Gold]	\$5296.20		\$5296.20	OK	\$27553.67
12/5/24	Raj	Wix Payments		Sponsors & Ads	Website Paul Drew UAMS job posting	\$363.82		\$363.82	OK	\$27917.49
<b>▼ Office</b>						<b>0</b>	<b>\$9174.36</b>	<b>\$9174.36</b>		
1/1/24	Raj	Zelle		Office	Wages December stipend		\$600.00	\$600.00	OK	\$27317.49
1/1/24	Raj	Zelle		Office	Wages January stipend		\$600.00	\$600.00	OK	\$26717.49
1/8/24	Raj	Chase Debit		Office	Website Google GSuite monthly fee		\$18.00	\$18.00	OK	\$26699.49
1/8/24	Raj	Chase Debit		Office	Other AACBNC Lapel pins (National Insigna Inc)		\$249.00	\$249.00	OK	\$26450.49
1/25/24	Raj	Chase Debit		Office	Other Zoom license renewal		\$159.90	\$159.90	OK	\$26290.59
2/1/24	Raj	Chase Debit		Office	Website Google GSuite monthly fee		\$18.00	\$18.00	OK	\$26272.59
2/2/24	Raj	Chase Debit		Office	Other Condolence Flowers to Dr. Engelhardt		\$105.94	\$105.94	OK	\$26166.65
2/3/24	Raj	Chase Debit		Office	Postage & Shipping Postage for checks		\$2.91	\$2.91	OK	\$26163.74
2/6/24	Raj	Chase Debit		Office	Postage & Shipping Postage for checks		\$0.68	\$0.68	OK	\$26163.06
2/8/24	Raj	Chase Debit		Office	Postage & Shipping Postage for checks		\$0.68	\$0.68	OK	\$26162.38
2/20/24	Raj	Check		Office	Postage & Shipping Postage for checks		\$5.08	\$5.08	OK	\$26157.30
2/29/24	Raj	Zelle		Office	Wages February stipend		\$600.00	\$600.00	OK	\$25557.30
3/1/24	Raj	Chase Debit		Office	Website Google GSuite monthly fee		\$19.85	\$19.85	OK	\$25537.45
4/1/24	Raj	Zelle		Office	Wages March stipend		\$600.00	\$600.00	OK	\$24937.45
4/1/24	Raj	Chase Debit		Office	Website Google GSuite monthly fee		\$21.60	\$21.60	OK	\$24915.85
4/19/24	Raj	Chase Debit		Office	Other AAMC Faculty Salary Publication		\$60.00	\$60.00	OK	\$24855.85
4/30/24	Raj	Zelle		Office	Wages April stipend		\$600.00	\$600.00	OK	\$24255.85
5/1/24	Raj	Chase Debit		Office	Website Google GSuite monthly fee		\$21.60	\$21.60	OK	\$24234.25
5/30/24	Raj	Zelle		Office	Wages May stipend		\$600.00	\$600.00	OK	\$23634.25
6/3/24	Raj	Chase Debit		Office	Website Google GSuite monthly fee		\$21.60	\$21.60	OK	\$23612.65



	Date of transaction	Entered by	Method of payment	Check #	Category	Description	Revenue amount - incoming	Disbursement amount - outgoing	Chase Bank Statement	Reconciled with Chase Bank Statement	Account Balance
	7/1/24	Raj	Zelle		Office	Wages		\$600.00	\$600.00	OK	\$23012.65
	7/1/24	Raj	Chase Debit		Office	Website		\$21.60	\$21.60	OK	\$22991.05
	7/30/24	Raj	Zelle		Office	Wages		\$600.00	\$600.00	OK	\$22391.05
	8/1/24	Raj	Chase Debit		Office	Website		\$21.60	\$21.60	OK	\$22369.45
	8/30/24	Raj	Zelle		Office	Wages		\$600.00	\$600.00	OK	\$21769.45
	9/1/24	Raj	Chase Debit		Office	Website		\$21.60	\$21.60	OK	\$21747.85
	9/30/24	Raj	Zelle		Office	Wages		\$600.00	\$600.00	OK	\$21147.85
	10/1/24	Raj	Chase Debit		Office	Website		\$21.60	\$21.60	OK	\$21126.25
	10/23/24	Raj	Chase Debit		Office	Website		\$446.93	\$446.93	OK	\$20679.32
	10/30/04	Raj	Zelle		Office	Wages		\$600.00	\$600.00	OK	\$20079.32
	11/1/24	Raj	Chase Debit		Office	Website		\$21.60	\$21.60	OK	\$20057.72
	11/7/24	Raj	Chase Debit		Office	Other		\$92.99	\$92.99	OK	\$19964.73
	12/2/24	Raj	Zelle		Office	Wages		\$600.00	\$600.00	OK	\$19364.73
	12/2/24	Raj	Chase Debit		Office	Website		\$21.60	\$21.60	OK	\$19343.13
	12/30/24	Raj	Zelle		Office	Wages		\$600.00	\$600.00	OK	\$18743.13
<b>▼ Fees &amp; Dues</b>							<b>0</b>	<b>\$1574.00</b>	<b>\$1574.00</b>		
	3/5/24	Raj	ACH		Fees & Dues	Fees		\$30.00	\$30.00	OK	\$18713.13
	4/3/24	Raj	ACH		Fees & Dues	Fees		\$74.00	\$74.00	OK	\$18639.13
	5/3/24	Raj	ACH		Fees & Dues	Fees		\$30.00	\$30.00	OK	\$18609.13
	6/5/24	Raj	ACH		Fees & Dues	Fees		\$30.00	\$30.00	OK	\$18579.13
	6/5/24	Raj	Chase Debit		Fees & Dues	Dues		\$650.00	\$650.00	OK	\$17929.13
	7/2/24	Raj	ACH		Fees & Dues	Fees		\$30.00	\$30.00	OK	\$17899.13
	8/5/24	Raj	ACH		Fees & Dues	Fees		\$30.00	\$30.00	OK	\$17869.13
	9/5/24	Raj	ACH		Fees & Dues	Fees		\$70.00	\$70.00	OK	\$17799.13
	10/3/24	Raj	Wix Payments		Fees & Dues	Fees		\$30.00	\$30.00	OK	\$17769.13
	11/5/24	Raj	Chase Debit		Fees & Dues	Fees		\$30.00	\$30.00	OK	\$17739.13
	11/25/24	Raj	Chase Debit		Fees & Dues	Dues		\$500.00	\$500.00	OK	\$17239.13
	12/4/24	Raj	Chase Debit		Fees & Dues	Fees		\$70.00	\$70.00	OK	\$17169.13
<b>▼ Annual Filing &amp; Insurance</b>							<b>0</b>	<b>\$1764.00</b>	<b>\$1764.00</b>		
	1/2/24	Raj	Chase Debit		Annual Filing & Insurance	Insurance		\$369.00	\$369.00	OK	\$16800.13
	4/30/24	Raj	Chase Debit		Annual Filing & Insurance	CPA Fees		\$1200.00	\$1200.00	OK	\$15600.13
	9/1/24	Raj	Chase Debit		Annual Filing & Insurance	Registered Agent Fees		\$120.00	\$120.00	OK	\$15480.13
	9/1/24	Raj	Chase Debit		Annual Filing & Insurance	Registered Agent Fees		\$65.00	\$65.00	OK	\$15415.13
	9/9/24	Raj	Chase Debit		Annual Filing & Insurance	Registered Agent Fees		\$10.00	\$10.00	OK	\$15405.13

	Date of transaction	Entered by	Method of payment	Check #	Category	Description	Revenue amount - incoming	Disbursement amount - outgoing	Chase Bank Statement	Reconciled with Chase Bank Statement	Account Balance		
▼	<b>Refund</b>						<b>0</b>	<b>\$4958.03</b>	<b>\$4958.03</b>				
	1/1/24	Raj	Wix Payments		Refund	Refund		\$400.00	\$400.00	OK	\$15005.13		
	1/4/24	Raj	Wix Payments		Refund	Refund		\$460.92	\$460.92	OK	\$14544.21		
	1/8/24	Raj	Wix Payments		Refund	Refund		\$388.10	\$388.10	OK	\$14156.11		
	1/8/24	Raj	Wix Payments		Refund	Refund		\$606.57	\$606.57	OK	\$13549.54		
	1/22/24	Raj	Wix Payments		Refund	Refund		\$606.57	\$606.57	OK	\$12942.97	Appears as \$145.65 debit on bank statement	
	1/22/24	Raj	Wix Payments		Refund	Refund		\$388.10	\$388.10	OK	\$12554.87		
	1/20/24	Raj	Wix Payments		Refund	Refund		\$388.10	\$388.10	OK	\$12166.77		
	1/30/24	Raj	Chase Debit		Refund	Refund		\$606.57	\$606.57	OK	\$11560.20		
	1/30/24	Raj	Chase Debit		Refund	Refund		\$388.10	\$388.10	OK	\$11172.10		
	12/9/24	America	Wix Payments		Refund	Refund		\$725.00	\$725.00	OK	\$10447.10		
▼	<b>Chase Savings Interest</b>						<b>\$3.00</b>	<b>0</b>	<b>\$3.00</b>				
	1/31/24	Raj	ACH		Chase Savings Interest	Chase Savings Interest for January	\$0.27		\$0.27		\$15095.41		
	2/28/24	Raj	ACH		Chase Savings Interest	Chase Savings Interest for February	\$0.24		\$0.24		\$15095.65		
	3/31/24	Raj	ACH		Chase Savings Interest	Chase Savings Interest for March	\$0.24		\$0.24		\$15095.89		
	4/28/24	Raj	ACH		Chase Savings Interest	Chase Savings Interest for April	\$0.26		\$0.26		\$15096.15		
	5/31/24	Raj	ACH		Chase Savings Interest	Chase Savings Interest for May	\$0.25		\$0.25		\$15096.40		
	6/30/24	Raj	ACH		Chase Savings Interest	Chase Savings Interest for June	\$0.23		\$0.23		\$15096.63		
	7/31/24	Raj	ACH		Chase Savings Interest	Chase Savings Interest for July	\$0.27		\$0.27		\$15096.90		
	8/31/24	Raj	ACH		Chase Savings Interest	Chase Savings Interest for August	\$0.24		\$0.24		\$15097.14		
	9/29/24	Raj	ACH		Chase Savings Interest	Chase Savings Interest for September	\$0.25		\$0.25		\$15097.39		
	10/31/24	Raj	ACH		Chase Savings Interest	Chase Savings Interest for October	\$0.25		\$0.25		\$15097.64		
	11/30/24	Raj	ACH		Chase Savings Interest	Chase Savings Interest for November	\$0.24		\$0.24		\$15097.88		
	12/31/24	Raj	ACH		Chase Savings Interest	Chase Savings Interest for December	\$0.26		\$0.26		\$15098.14		
▼	<b>Total</b>						<b>\$49682.87</b>	<b>\$87588.24</b>	<b>0</b>				
					Total	Total Revenue	\$49682.87						
					Total	Total Disbursements		\$87588.24					
▼	<b>(blank)</b>						<b>0</b>	<b>0</b>	<b>0</b>				

**AACBNC -- 2025 Proposed CY Budget**  
**Income**  
**Actual 2024 v Projected 2025**

Category	Actual Income	Projected Income	Actual Income	Projected Income	Projected Change	
	1/1/2023 - 12/31/2023	1/1/2024 - 12/31/2024	1/1/2024 - 12/31/2024	1/1/2025 - 12/31/2025		
Membership Dues	18,126.62	15,000.00	12,890.56	11,875.00	(1,015.56)	assume 25 member dues @ \$475
Meeting Income	36,673.77	40,000.00	24,388.89	25,000	611.11	\$24,317 in 2024 mtg, 48 attendees
Sponsors & Ads	35,261.60	10,000.00	12,400.42	10,000	(2,400.42)	\$35K (in 2024 mtg), \$23K (in 2023 mtg)
Money Fund Earnings	2.96	3.00	3.00	3.00	0	
Contributions	0.67	-	-	-	0	
Miscellaneous/Carry Over	31.12	-	-	-	0	
<b>Total Income</b>	<b>90,096.74</b>	<b>65,003.00</b>	<b>49,682.87</b>	<b>46,878.00</b>	<b>(2,804.87)</b>	

**AACBNC -- 2025 Proposed CY Budget**  
**Expenses**  
**Actual 2024 v Projected 2025**

Category	Actual Disbursements	Projected Disbursements	Actual Disbursements	Projected Disbursements	Projected Change	
	1/1/2023 - 12/31/2023	1/1/2024 - 12/31/2024	1/1/2024 - 12/31/2024	1/1/2025 - 12/31/2025		
Meetings	68,569.26	90,000.00	70,117.85	45,000.00	(25,117.85)	F&B+Dep 22K, Spkrs 11K, Inc 12K
Office	8,202.82	10,000.00	9,174.36	12,000.00	2,825.64	
Fees & Dues	3,598.44	1,800.00	1,574.00	3,500.00	1,926.00	Wix fees 2.9%, ~\$1500; Insurance \$800
CPA and Registered Agent	1,739.00	2,000.00	1,764.00	3,000.00	1,236.00	
Society Reps Travel	-	1,000.00	-	1,000.00	1,000.00	
Refunds	4,807.51	4,000.00	4,958.03	6,000.00	1,041.97	Refunds for mtg cancellations
Contributions	2,500.00	2,500.00	-	2,500.00	2,500.00	To 2025 AAA Annual mtg
Miscellaneous/Carry Over	31.12	-	-	-	0	
<b>Total Disbursements</b>	<b>89,448.15</b>	<b>111,300.00</b>	<b>87,588.24</b>	<b>73,000.00</b>	<b>(14,588.24)</b>	

**AACBNC -- 2025 Proposed CY Budget**  
**Actual 2024 v Projected 2025**

	Actual 2023	Projected 2024	Actual 2024	Projected 2025	Projected Change
	1/1/2023 - 12/31/2023	1/1/2024 - 12/31/2024	1/1/2024 - 12/31/2024	1/1/2025 - 12/31/2025	
Total Income	90,096.74	65,003.00	49,682.87	46,878.00	(2,804.87)
Total Disbursements	89,448.15	111,300.00	87,588.24	73,000.00	(14,588.24)
"Profit" ("Loss")	648.59	(46,297.00)	(37,905.37)	(26,122.00)	11,783.37

## Membership, Meeting & Asset history

Year	Location	#Membership	#Member Attendees	Revenues	Expenses	Net	Yr-End Total Assets	
2013	Puerto Rico	79	33	\$ 29,110.00	\$ 31,274.44	\$ (2,164.44)	\$ 86,616.82	
2014	Islamardo	65	45	\$ 30,755.00	\$ 50,724.67	\$ (19,969.67)	\$ 82,283.46	joint meeting
2015	Los Cabos	60	40	\$ 32,730.00	\$ 20,754.57	\$ 11,975.43	\$ 53,489.56	all inclusive
2016	Hawaii	64	43	\$ 34,150.00	\$ 75,172.20	\$ (41,022.20)	\$ 89,204.95	
2017	Marco Island	67	55	\$ 49,960.00	\$ 65,230.14	\$ (15,270.14)	\$ 99,018.01	joint meeting
2018	Cancun	63	46	\$ 46,300.00	\$ 24,596.94	\$ 21,703.06	\$ 132,828.00	all inclusive
2019	Key West	60	43	\$ 49,438.00	\$ 96,431.54	\$ (46,993.54)	\$ 112,110.19	joint meeting
2020	Bahamas	53	33	\$ 41,652.00	\$ 76,161.32	\$ (34,509.32)	\$ 76,183.96	co-located
2021	Virtual	43	34	\$ -	\$ 822.50	\$ (822.50)	\$ 81,308.08	joint meeting
2022	Virtual	57	36	\$ -	\$ -	\$ -	\$ 62,802.08	
2023	St Petersburg	49	24	\$ 44,900.00	\$ 75,844.51	\$ (30,944.51)	\$ 63,911.53	
2024	St. Kitts	38	24	\$ 59,578.00	\$ 25,363.74	\$ 34,214.26	\$ 25,545.24	
2025	Costa Rica	28	21					

