

**CENTRAL FLORIDA DISTRICT DENTAL ASSOCIATION
EXECUTIVE COUNCIL MEETING
Thursday, May 2, 2024 3:30 p.m.
Matanzas Room – Hammock Beach Resort
AGENDA**

Conflict of Interest Statement

Dr. Roderick MacIntyre, III, President, Presiding

I. Call to Order

Dr. Rod MacIntyre

II. Attendance/Quorum

Marlinda Fulton

III. Introduction of Guests

IV. Additional Agenda Items:

- A.
- B.
- C.

V. Adoption of Agenda

VI. Approval of Minutes

A. Executive Council Meeting – September 22, 2023

Pages 1-3

VII. Treasurer's Report

Dr. Bernard Kahn

A. Financial Reports

1. 2023-2024 Profit/Loss Report

Handout

2. Balance Sheet

Handout

B. Proposed Budget 2024-2025

Pages 4-6

VIII. President's Report

Dr. Rod MacIntyre

IX. Executive Director's Annual Report

Marlinda Fulton

Pages 7-8

X. Old Business

A. 2024 FLA MOM

Page 9

B. UF Resident Event

Drs. John Cordoba/Joseph Richardson

C. 2024 ADA Delegation Report

Page 10

D. Howard Prankoff Leadership/Educational Memorial Fund

XI. New Business

A. Report from FDA Trustees

Dr. John Cordoba

- B. Nominating Committee Report Dr. Rod MacIntyre
 1. Marion County Dental Association Candidate for Page 11
 Incoming CFDDA Secretary
- C. Resolutions for June FDA HOD (from the CFDDA)
- D. 2025 FLA MOM Dr. Bert Hughes/Dr. Joseph Richardson
- E. FDA Survey Questions
- F. Policy on CFDDA Check Signing Page 12
(Signers on the Wells Fargo account)
- G. Peer Review Report from the FDA Pages 13-14
- H. Annual Meeting Report 2024 Dr. Rod MacIntyre
- I. Annual Meeting Report 2025 Dr. Joseph Richardson
Program Committee Members: Drs. Bert Hughes, Monique Belin, Joe Richardson, Diego Baratelli, and Katie Miller
- J. Annual Meeting Report 2026 Dr. Gregory Chace

XII. Additional Agenda Items.

XIII. Adjournment

The next CFDDA Executive Council Meeting will be Fall 2024.

**CENTRAL FLORIDA DISTRICT DENTAL ASSOCIATION
EXECUTIVE COUNCIL MEETING**

Minutes

September 22, 2023

Courtyard by Marriott Downtown Orlando

Present: Dr. Rod MacIntyre, President, Dr. Greg Chace, First Vice President, Dr. Katie Miller, Secretary, Dr. Beth Nixon, Immediate Past President, Dr. Bernard Kahn, Treasurer, Dr. Bert Hughes, Trustee, Dr. John Cordoba, Trustee, Dr. Paul Martin, ACDA, Dr. Monique Belin, MCDA, Dr. Matthew Sheldon, BCDS, Dr. Wade Winker, LCDA, Dr. James Kortbus, VFDDA, and Dr. Anthony Wong, DSGO

Staff: Marlinda Fulton, Executive Director

Absent: Dr. Joseph Richardson, President Elect and Dr. Chris Hambrook, Second Vice President

Guests: Dr. Drew Eason, FDA Executive Director, Dr. Jerry Bird, FDA Immediate Past President, and Mr. Steve Miller, Morgan Stanley.

Dr. MacIntyre read the conflict of interest statement.

New executive council meetings introduced themselves: Dr. Paul Martin and Dr. Wade Winker (CFDDA past president).

Mr. Steve Miller, Morgan Stanley, gave an update and overview of the CFDDA account. Reviewed inflation statistics, services still going up. There still is a risk of recession (30% chance) and still being cautious. CFDDA is at 55% equities with some investment cash, and 5% accessible cash in gold, waiting to see what happens before they switch to bonds. Will not commit money into long term investments at this time.

Dr. MacIntyre called the meeting to order at 1:34 p.m. A quorum was declared.

Additional agenda items:

1. Officer Installation at FDC – Room
2. Florida Mission of Mercy Update 2025 – Dr. Hughes
3. LEAD Event in January – Dr. Cordoba

MOTION made to adopt the amended agenda. Seconded. Passed.

Review of Minutes

MOTION to approve the minutes from May 4, 2023. Seconded and passed.

President's Report

Dr. MacIntyre welcomed Dr. Katie Miller to the EC, as the 2023-2024 Secretary. Review of the 23-24 CFDDA Delegation to the FDA. Dr. MacIntyre did his first affiliate visit to Lake County Dental Association.

Treasurer's Report

Dr. Bernard Kahn presented the treasurer's report as printed. He reviewed the profit/loss statement and balance sheet. Motion made to approve the Treasurer's Report. Seconded. Motion adopted unanimously.

Old Business

A. UF Events – Dr. John Cordoba shared the UF D3-D4 will be Thursday, January 25, 2024, in conjunction with the ACD ethics day event. The resident event is not planned due to the departments going through accreditation, but hopefully soon will get something on the calendar.

New Business

A. FDA Trustee Report – Dr. Hughes reported the BOT met August 25-26, 2023, at the Hotel Effie in Sandestin, Florida. FDA President, Dr. Beatriz Terry reported on her meeting/travel highlights. The BOT had a good session on sexual harassment in the workplace. There was a market share discussion addressing all the dentists moving to Florida and the effort to recruit them to join organized dentistry. A membership development officer has been retained by the FDA to visit DSO offices in South Florida to engage on behalf of the ADA and FDA. The FDA won two awards for membership at the ADA this year. The workforce issue is being addressed and the BOT is trying to solve long-term and short-term problems. The Florida Dental Convention was a great success this year. The 2024 FLA MOM will be in Lakeland, Florida, May 30-June 1. The FDA donated \$5000.00 to Hawaii for the fires. The FDA's speaker of the house, treasurer, editor and six at large spots will be opened for the election to be held at the June 2024 House of Delegates. Attendance policy for the BOT was addressed and will continue to be tweaked. Dr. Cordoba addressed the California Dental Association wanting to have membership to the ADA optional.

B. FDA HOD – Dr. MacIntyre asked for resolutions to be taken to the FDA HOD in January, Orlando. Equality in pay act, re: insurance reimbursement was discussed.

C. ADA Protected Positions/ADA Delegation/Alternate 2023 CFDDA Delegation to the FDA Allocation – Reviewed as printed. A nomination form will be included in the November enews for the designated component trustee.

D. BOT Terms Expiring – Dr. Cordoba will run from the floor to continue his BOT position. Dr. Hughes designated position does not expire until 2025.

E. Bylaws Committee – The EC addressed forming a bylaws committee to get them aligned with the FDA, especially since the new governance was passed and implemented. Dr. Beth Nixon volunteered, along with Dr. Paul Martin. Dr. Nixon will reach out to Dr. Suzi Thiems-Heflin. The proposed bylaws will be presented to the January 11, 2024, CFDDA House of Delegates.

F. Dr. Rudy Liddell – Discussion on the component supporting this campaign, which has not been for previous candidates (Buckenheimer, Sabates). Individual support will be encouraged.

G. CFDDA Laptop – A new laptop for the CFDDA, with all the applications needed, will be between \$1000.00-\$1,500.00. The current laptop is over six years old. The EC encouraged her to move forward with a purchase.

H. Howard Pranikoff Leadership Educational Foundation – The EC discussed the best way to honor Dr. Pranikoff is to establish a leadership/educational fund to provide leadership training to assist young members. Motion to place the Dr. Howard L. Pranikoff Leadership/Educational Memorial Fund as a line item on the 2024 CFDDA Budget. Seconded. Approved. Motion made for the CFDDA to designate \$3000.00 as a start-up for the fund. Seconded. Approved.

Drs. Monique Belin, Roderick MacIntyre, Wade Winker, and Bernard Kahn agreed to serve on a task group to work out the details.

Additional Agenda Items

1. Installation of 2024-2025 CFDDA Officers – To be held at the CFDDA Annual Meeting in May at Hammock Beach prior to the “beach party” on Friday afternoon and families will be able to attend.
2. FLA MOM 2025 – Dr. Hughes reported the application to host has been received by the Florida Dental Association Foundation Board. Dr. Oscar Morejon has agreed to serve as the finance chair. Sites being looked at are Daytona State College and Bethune (both have gyms), also Embry Riddle – gym/multipurpose center, which has a nice campus and plenty of parking. Dr. McIntyre will reach out to Embry Riddle. Another option is Mainland High School, along with Daytona 500, space upstairs and downstairs.
3. LEAD event – Dr. Cordoba promoted this upcoming event, which will happen the day before the January HOD in Orlando.

Announcements

- A. 2024 Annual Meeting Update – The venue is the Hammock Beach Resort and speakers are being finalized.
- B. 2025 Annual Meeting Update – Returning to Hammock Beach Resort, more information to follow.

Adjournment – Being no further business the meeting adjourned at 3:08 p.m.

At this time, Mr. Drew Eason, Florida Dental Association, then reviewed membership statistics, focusing on market share percentages for the FDA/CFDDA. The EC, divided into two teams, participated in a Hack-a-thon to brainstorm ideas on how to get dentists to join the tripartite.

Some ideas/thoughts:

- Consider where information (membership) is provided – is it where potential new members will be looking?
- Market to the transient dentist upon entering the state.
- Find ways to make membership more fun and attractive-new generation of dentists want balance, not more work.
- Extend new member free/pro-rated fees for longer period of time.
- Have a “power hour” and have affiliate membership chairs/presidents reach out one-on-one with a phone call.
- Direct contact (as mentioned above).
- Provide a nice atmosphere for a meet/greet.
- Do indirect and direct marketing.

CENTRAL FLORIDA DISTRICT DENTAL ASSN.

Profit & Loss Budget Overview

July 2024 through June 2025

	Jul '24 - Jun 25
Ordinary Income/Expense	
Income	
Morgan Stanley Invest Income	
MS Interest - Cash Account	900.00
MS Interest - Invest Account	0.54
MS ST Cap Gain +/-	-700.00
MS LT Cap Gain +/-	1,800.00
MS LT Cap Gain Distribution	5,000.00
MS Other Dividends	6,000.00
MS Other Credits	82.66
MS unrealized +/-	10,000.00
MS Prior Year Adjustment	-2,000.00
Total Morgan Stanley Invest Income	21,083.20
Affiliate Admin Asst.	500.00
E-News Advertising	600.00
Leadership Directory	500.00
Meeting Reim.-ED-In-state	250.00
DUES	133,000.00
Mail List Revenue	36,000.00
M.B.N.A. CREDIT CARD ROYALTY	3,600.00
NEWSLETTER ADVERTISING	2,800.00
ANNUAL MTG.	
50/50 Raffle Funds Collect-Cash	500.00
Member Benefit Registration	23,000.00
Onsite Registration	50.00
registration - non mbr	550.00
Speaker sponsor	4,000.00
registration-FDA/ADA Mbr	400.00
Exhibits	24,000.00
Total ANNUAL MTG.	52,500.00
Total Income	250,833.20
Gross Profit	250,833.20
Expense	
Pres Reim-Affiliate Visits	500.00
Plaques/Awards	300.00
CC Proc Fee Charge FDA	2,700.00
CC Proc. Fee Charge-DSGO	1,000.00
Morgan Stanley Maintenance	3,800.00
Credit card fee-AE	175.00
EXEC. COUNCIL MTGS.	
Reim for EC Meeting	300.00
EXEC. COUNCIL MTGS. - Other	2,000.00
Total EXEC. COUNCIL MTGS.	2,300.00
CFDDA HOUSE OF DELEGATES	2,500.00
ANNUAL MEETING	
games	175.00

CENTRAL FLORIDA DISTRICT DENTAL ASSN.

Profit & Loss Budget Overview

July 2024 through June 2025

	<u>Jul '24 - Jun 25</u>
Hotel Room Credit	-1,000.00
Welcome Reception - Entertainme	300.00
Member Benefit Registration	23,000.00
Speaker Expense (i.e. travel)	1,500.00
Hotel Deposit Adj.	-20,000.00
Welcome Reception-Drink	2,400.00
Door Prizes	50.00
AV-Sat	2,600.00
AV-Friday	3,300.00
Electric to vendors	400.00
Breakfast-Sat	4,500.00
Breakfast-Friday	6,000.00
Break-Sat-AM	2,000.00
Break-Fri-AM	2,400.00
Hotel Rooms	2,000.00
Hotel Deposit	20,000.00
Welcome reception-Food	3,000.00
Staff Reim.	500.00
Exh. Refund	1,000.00
Registration Refund	300.00
Exhibitor Expense	800.00
Print/Post-Mtg. Brochure	3,200.00
CLINICIANS	
HONORARIUM	<u>13,000.00</u>
Total CLINICIANS	<u>13,000.00</u>
Total ANNUAL MEETING	71,425.00
GENERAL EXPENSES	
Leadership Directory	600.00
Recruitment	
UF Event	<u>1,700.00</u>
Total Recruitment	1,700.00
CONTRIBUTIONS	
FLA. DENTAL HEALTH FND.	<u>2,500.00</u>
Total CONTRIBUTIONS	2,500.00
INSURANCE	
Annual Meeting Insurance	140.00
BUILDING PACKAGE	900.00
FDA LIABILITY INS.	500.00
WORKMAN'S COMP.	<u>700.00</u>
Total INSURANCE	2,240.00
LEGAL AND ACCT.	1,800.00
NEWSLETTER	
EMail Program	1,200.00
Postage	3,300.00
Print/Graphics Newltr.	14,000.00

CENTRAL FLORIDA DISTRICT DENTAL ASSN.
Profit & Loss Budget Overview
July 2024 through June 2025

	<u>Jul '24 - Jun 25</u>
Website	600.00
Total NEWSLETTER	19,100.00
TAXES AND LICENSES DEPT/CORP. REPORT	61.25
Total TAXES AND LICENSES	61.25
FDA HOD Meetings	
Delegate/Alt. Reimbursement	9,800.00
FDA HOD Meetings - Other	5,000.00
Total FDA HOD Meetings	14,800.00
Total GENERAL EXPENSES	42,801.25
OFFICE	
online reg form - Jotform	250.00
Storage Fee	3,600.00
Contract Labor EOY	1,473.00
Contract Labor	70,700.00
Computer	1,200.00
MEETING EXPENSE	
Mtgs.-In State - ED	1,800.00
Total MEETING EXPENSE	1,800.00
Postage	
Meter Rental	370.00
Postage - Other	900.00
Total Postage	1,270.00
Supplies	708.04
TELEPHONE - GENERAL EXPENSE	700.00
Total OFFICE	81,701.04
PAYROLL EXPENSES	10,200.00
Total Expense	219,402.29
Net Ordinary Income	31,430.91
Net Income	<u>31,430.91</u>

Executive Director Report – EC Meeting, May 2, 2024

Membership

Total membership as of 11/23/2023: 1668

Total membership as of 12/31/2022: 1655 12/31/2021: 1727

Currently: 3/27/2024: 1679

year	total active mbrs	% market share	% g/l	Total dentists in area	FDA % for dele. alloc. for the next yr	#drop in July by ADA	total all members eoy
y/e 2014	1194	60.9		1875	22%		1452
2015	1231	61.3	0.97	1961	21%	66	1487
2016	1265	63.1	1.80	2007	21%	83	1518
2017	1329	65.4	2.30	2033	21%	88	1610
2018	1368	65.7	0.30	2081	21%	121	1659
2019	1399	64.7	-1.00	2161	22%	131	1707
2020	1340	60.9	-0.50		22%	169	1640
2021	1404	61.7	0.90	2272	22%	126	1718
2022	1333	58	-3.70	2298	21%	168	1655
2023	1316	56	-2.00	2349	TBD		133 1668 (11/23/23)

Retention Efforts for 2024 as of March 27, 2024

December Sharon calling those who are on last year of free or reduced dues

December 2023 Enews Reminder with link to pay

1/8/24 512 non renews

1/15/24 451 non renews

1/22/24 419 non renews

Feb Enews Renew Reminder

2/12/24 329 non renews

2/19/2024 316 non renews

Mar Enews Reminder and info on the 20 ADA wins – article from ADA

March 4, 2024 279 ('23 – 248, '22-369)

March 18, 2024 266 ('23 – 211, '22-282)

March 18, 2024 Mass email to the above 266 – membership will be dropped 4/1/24

Spring Newsletter Quick and Easy to renew blurb

March 27, 2024 237 non-renews – sent another quick email out. Drop date – March 31st.

(March 31, 2023 – 179, in 2022 – 279, in 2021 – 206, in 2020 – 284)

Fonteva – Training begins at the end April for components and will end in June. CFDDA has access to the support website to track updates, etc. Aptify goes dead on July 8.

Website

The free Medical Errors remains on the website as it is now through the Doctors Company, members self-report. The Howard Pranicoff Scholarship information is on the website. CFDDA continues to update the website as necessary.

Facebook – 718 followers as of March 27, 2024. (673 followers as of March 2023).

Affiliates

Have sent request out to all affiliates for new leadership ('24-'25) and delegates/alternate delegates. Due date May 31, 2024. Will be sending the new leadership the use of CFDDA CE Provider Number

requirements and processes. Also, will be reviewing affiliate membership lists. Because CFDDA sends dues statement and maintains membership databases for ACDA, LCDA, MCDA, and VFCDA – most members are now members of the ADA/FDA/CFDDA. Those that are not receive a letter encouraging them to join and their affiliate membership is at risk.

UF – Will be working with Dr. Cordoba and Dr. Richardson to set-up an events for dental residents and then for dental students,

Newsletter/E-News

Newsletter continues to go out quarterly. Will be highlighting new leadership in July 2024. This Spring Edition went out early to promote the CFDDA Annual Meeting.

E-News – Continue to utilize the easier to read structure. From March 2023-March 2024, the CFDDA sent 22 emails.

Financials

Fiscal year winds down June 30, 2024. Tax return will be filed August 2024. Continue to monitor operating expenses and when able, transfer funds to MS account.

Meetings

Will be planning Fall EC meeting with Dr. Richardson soon, followed by January 2024 HOD/in-person caucus in Orlando in preparation of FDA HOD in Tampa.



545 John Knox Road, Ste. 200 ■ Tallahassee, FL 32303
850.681.3629 ■ 800.877.9922 ■ Fax: 850.561.0504
foundation@floridadental.org

March 8, 2024

Dr. Rod McIntyre
Central Florida District Dental Association
800 North Mills Ave
Orlando, FL 32803

Dear Dr. McIntyre,

On behalf of the Florida Dental Association Foundation, I would like to thank the Central Florida District Dental Association for being a Bronze Sponsor for the 2024 *Florida Mission of Mercy*. The Central Florida District Dental Association's generous sponsorship of \$2,500 will help provide dental care for patients at the next *FLA-MOM* in Lakeland May 31–June 1, 2024.

FLA-MOM is the largest charitable dental clinic in the state. Our program provides care to patients at no cost to them, with the goal of serving the underserved and uninsured in Florida—those who would otherwise go without care. Since 2014, *FLA-MOM* has provided \$14.67 million in donated dental care to more than 13,000 patients.

Your support is an essential component of everything we do, and it is an honor to partner with the Central Florida District Dental Association as we change lives through the gift of dentistry. Thank you again for your gift!

Sincerely,

A handwritten signature in green ink that reads 'R. Jai Gillum'.

R. Jai Gillum
Director of Foundation Affairs

As required by the Internal Revenue Service, please accept this letter as our acknowledgement that you received no goods or services for your tax-deductible contribution. Please keep this letter for your records. Florida Dental Association Foundation, Inc. FEIN: 59-2019148

The FDA Foundation is the philanthropic arm of the Florida Dental Association promoting dental health for all Floridians. A COPY OF THE OFFICIAL REGISTRATION (CH2435) AND FINANCIAL INFORMATION MAY BE OBTAINED FROM THE DIVISION OF CONSUMER SERVICES BY CALLING 1-800-HELP-FLA TOLL-FREE WITHIN THE STATE OR GO TO www.freshfromflorida.com. REGISTRATION DOES NOT IMPLY ENDORSEMENT, APPROVAL, OR RECOMMENDATION BY THE STATE.

2024

Florida Delegation to the ADA

June 2024 - June 2025

Delegates

Capacity	Name	On Del. Since	Current Term Began	Current Term Ends	Term Length	Last Eligible Term	Notes
Automatic Positions							
ADA 17th District Trustee:	Rudy Liddell	2011	10/20	10/24	4		
ADA 17th District Trustee-elect:	Andy Brown	2011	10/24	10/28	4		
1 FDA Pres (Automatic Del)	Jeff Ottley	2016	6/24	6/25	1		
2 FDA P-E (Automatic Del)	John Paul	2009	6/24	6/25	1		Vice-chair
3 FDA IPP (Automatic Del)	Beatriz Terry	2018	6/24	6/25	1		
Component Designated							
4 ACDDA Delegate	Donovan Essen	2022	6/22	6/25	3	6/22-6/25	
5 CFDDA Delegate	Monique Belin	2023	6/24	6/27	3	6/24-6/27	
6 NEDDA Delegate	Bethany Douglas	2021	6/24	6/27	3	6/24-6/27	
7 NWDDA Delegate	Reese Harrison	2019	6/22	6/25	3	6/22-6/25	
8 SFDDA Delegate	Melissa Sedeno	2024	6/24	6/25	3	6/24-6/27	
9 WCDDA Delegate	James Wilson	2024	6/24	6/27	3	6/24-6/27	
At Large Positions							
10 Delegate	Natalie Carr Bustillo	2018	6/24	6/27	3		
11 Delegate	Steve Zuknick	2009	6/24	6/27	3		Whip
12 Delegate	Paul Palo	2013	6/24	6/27	3		
13 Delegate	Zack Kalarickal	2006	6/24	6/27	3		
14 Delegate	Reza Iranmanesh	2020	6/24	6/27	3		
15 Delegate	Bert Hughes	2013	6/22	6/25	3		
16 Delegate	Chris Bulnes	2013	6/22	6/25	3		
17 Delegate	vacant		6/22	6/25	3		*Andy's old spot
18 Delegate	Robin Nguyen	2015	6/22	6/25	3		
19 Delegate	Linda Trotter	2013	6/22	6/25	3		
20 Delegate	Tom Brown	2019	6/23	6/26	3		
21 Delegate	Paul Miller	1999	6/23	6/26	3		
22 Delegate	Johnny Johnson	2023	6/23	6/26	3		
23 Delegate	John Cordoba	2015	6/22	6/25	3		

Alternates

Capacity	Name	On Del. Since	Current Term Began	Current Term Ends	Term Length	Last Eligible Term	Notes
Automatic Positions							
1 FDA 1st VP (Automatic Alt)	Dan Gesek	2011	6/24	6/25	1		Chair
Component Designated							
2 ACDDA Alternate	Alana Humberson	2023	6/23	6/25	2	6/23-6/25	
3 CFDDA Alternate	Katie Miller	2023	6/23	6/25	2	6/23-6/25	
4 NEDDA Alternate	Kenjula Brown	2024	6/23	6/25	2	6/23-6/25	took Mike Stratton's term
5 NWDDA Alternate	Jenna Pascoli	2024	6/24	6/26	2	6/24-6/26	
6 SFDDA Alternate	vacant		6/24	6/26	2	6/24-6/26	
7 WCDDA Alternate	Stephanie Mazariegos	2024	6/24	6/26	2	6/24-6/26	
At Large Positions							
8 Alternate	Susan Byrne	2022	6/24	6/26	2		
9 Alternate	Rodrigo Romano	2022	6/24	6/26	2		
10 Alternate	Suzi Thiems-Heflin	2013	6/24	6/26	2		
11 Alternate	Gerald Bird	2009	6/24	6/26	2		
12 Alternate	Steve Hochfelder	2024	6/24	6/26	2		
13 Alternate	Karen Glerum	2017	6/24	6/26	2		
14 Alternate	ArNelle Wright	2022	6/24	6/26	2		
15 Alternate	Lisa Klein	2024	6/24	6/26	2		
16 Alternate	Eva Ackley	2006	6/23	6/25	2		
17 Alternate	Joe Richardson	2021	6/23	6/25	2		
18 Alternate	Steve Cochran	2017	6/22	6/25	2		
19 Alternate	Anthony Wong	2020	6/23	6/25	2		
20 Alternate	Rick Stevenson	2006	6/23	6/25	2		
21 Alternate	Alla Bizanti	2023	6/23	6/25	2		
22 Alternate	Rachel Perez	2024	6/24	6/26	2		
23 Alternate	Jason Portnof	2024	6/24	6/26	2		



Marion County, Florida

Excellence in Dentistry in Florida's natural and beautiful horse country

February 18, 2024

Dear Executive Council Central Florida District Dental Association,

On behalf of the executive council and the entire body of membership for the Marion County Dental Association, we are pleased to nominate Dr. Monique Belin for the position of incoming Secretary of the Central Florida District Dental Association. 2024-2025.

Best Regards,

A handwritten signature in black ink, appearing to read "MB", written over a light blue horizontal line.

Dr. Mauricia Brown

President- Elect Marion County Dental Association

Section 6. The Treasurer

A. The Treasurer shall serve as the financial officer of the Association. As such, the Treasurer shall oversee the conduct of annual audits of the Association's financial affairs, review budget proposals, monitor year-to-date performance, and ensure the prudent investment of Association assets.

B. The Treasurer, in conjunction with the Executive Director, shall act as custodian for all monies belonging or owing to this Association, and shall hold, invest, disburse, or convey such funds in the name of the Association at direction of the Executive Council and/or the Association. All disbursements shall be made by check, which shall be signed by the Treasurer. In the event that the Treasurer is unavailable or incapacitated, the individuals elected, per CFDDA policy, of the Association shall be authorized to sign checks for the proper disbursements of the Association.

C. The Treasurer, shall see that the Budget and Finance Committee review the financial records of the Association immediately following the end of the fiscal year and before they are turned over to the new Treasurer. The audit of the financial records of the Association by a CPA is to be done at the discretion of the Executive Council. The Treasurer shall submit all records to the Executive Council or its auditors when requested to do so by the Executive Council.

D. The Treasurer, in conjunction with the Executive Director, shall report to the Executive Council all members who are under suspension from membership for non-payment of dues.

E. The Treasurer, in conjunction with the Executive Director, shall, within a period of thirty (30) days following the installation of his successor, remit all records, forms, and physical assets of this Association to the duly installed successor.

2022

Date	Outcome	Settled By	PR Chair
Quarter 2			
5/25/2022	Ref. PT. \$5,000.	L. Tucker	Dr. Dr. Wade Winker —
6/3/2022	Ref. PT. \$5,500.	L. Tucker	Dr. Cecil Abraham
6/7/2022	Case Closed	L. Tucker	Dr. Don Thomas —
6/8/2022	Ref. PT. \$2,666./Writeoff \$1,200.	PR Chair	Dr. Mark Abdoney
6/13/2022	Ref. PT. \$13,016.	PR Chair	Dr. Thomas Rubino
6/14/2022	Ref. PT. \$7,500.	L. Tucker	Dr. Ethan Pansick
6/22/2022	Ref. PT. \$3,000./Ref. Ins. \$5,204.74	L. Tucker	Dr. Carl Mallick
6/24/2022	Ref. PT. \$3,493.08	L. Tucker	Dr. Stephen Peirce
6/24/2022	Case Closed	PR Chair	Dr. Jose Sarasola
6/27/2022	Ref. PT. \$1,500.	L. Tucker	Dr. Ethan Pansick
Quarter 3			
7/6/2022	Ref. PT. \$338.	L. Tucker	Dr. Brett Laggan
7/12/2022	Ref. PT. \$3,561.	PR Chair	Dr. Mark Abdoney
7/14/2022	Ref. PT. \$10,500.	PR Chair	Dr. Deirdre Campbell-Catlin
8/2/2022	Ref. PT. \$460./Ref. Ins. \$1,014.	L. Tucker	Dr. Sudhir Agarwal
8/15/2022	Case Closed	PR Chair	Dr. Mark Obman
8/30/2022	Ref. PT. \$6,000.	L. Tucker	Dr. James Edwards
8/30/2022	Case Closed	PR Chair	Dr. Harley Richards
9/9/2022	Ref. PT. \$3,048./Writeoff \$900.	L. Tucker	Dr. Don Thomas —
9/12/2022	Ref. PT. \$618./Writeoff \$73.50	L. Tucker	Dr. Jose Sarasola
9/15/2022	Ref. PT. \$6,961.	PR Chair	Dr. Stephen Peirce
9/15/2022	Ref. PT. \$635./Writeoff Crn. Balance	L. Tucker	Dr. James Edwards —
9/28/2022	Case Closed	PR Chair	Dr. Deirdre Campbell-Catlin
Quarter 4			
10/10/2022	Ref. PT. \$5,587.	L. Tucker	Dr. James Edwards —
11/1/2022	Ref. PT. \$285.	PR Chair	Dr. James Hansen
11/3/2022	Case Closed	PR Chair	Dr. Mark Obman
11/4/2022	Case Closed	PR Chair	Dr. David Cardman
11/30/2022	Ref. PT. \$3,500.	L. Tucker	Dr. Cecil Abraham
12/1/2022	Ref. PT. \$800.	L. Tucker	Dr. Ryan Askeland
12/15/2022	Ref. PT. \$1,029.93	L. Tucker	Dr. Roger Scott

2023

Date	Outcome	Settled By	PR Chair
Quarter 1			
1/24/2023	Ref. PT. \$3,590/ Ref. Ins.	L.Tucker	Dr. Luis Martinez
1/27/2023	Ref. PT. \$4,010	L. Tucker	Dr. Sudhir Agarwal
2/7/2023	Case Closed	L. Tucker	Dr. Jose Sarasola
2/17/2023	Ref. PT. \$1,100.	PR Chair	Dr. Gay Jacobs
Quarter 2			
4/6/2023	Case Closed	PR Chair	Dr. Jose Sarasola
4/18/2023	Case Closed	L. Tucker	Dr. Greg Jacobs
5/8/2023	Case Closed	PR Chair	Dr. Ethan Pansick
5/11/2023	Ref. PT. \$5,500	PR Chair	Dr. James Hansen
5/15/2023	Case Closed	L. Tucker	Dr. Jose Sarasola
5/15/2023	Case Closed	PR Chair	Dr. Cecil Abraham
5/18/2023	Case Closed	L. Tucker	Dr. Phillip Kraver
6/6/2023	Treatment (Crown)	L.Tucker	Dr. Gary Palsis
6/7/2023	Writeoff \$16,000./ Ref. Pt \$5,000.	L. Tucker	Dr. Luis Martinez
6/26/2023	Still Open		Dr. Don Thomas —
6/26/2023	Case Closed	L. Tucker	Dr. Wade Winker —
Quarter 3			
7/24/2023	Ref. PT. \$1,329.45	L.Tucker	Dr. Gary Palsis
7/24/2023	Case Closed	L. Tucker	Dr. Don Thomas —
7/27/2023	Ref. PT. \$11,000	PR Chair	Dr. Wade Winker —
8/10/2023	Writeoff \$2,810./Ref. PT. \$390.	L. Tucker	Dr. Ethan Pansick
8/17/2023	Case Closed	PR Chair	Dr. Jose Sarasola
8/24/2023	Ref. PT. \$5,500	L. Tucker	Dr. Carl Mallick
8/25/2023	Case Closed	L. Tucker	Dr. Don Thomas —
8/25/2023	Ref. PT. \$1,020./ Ref. Ins. \$826.	L. Tucker	Dr. Gary Palsis
9/5/2023	Ref. PT. \$7,220.	PR Chair	Dr. Sudhir Agarwal
9/13/2023	Case Closed	L. Tucker	Dr. Jose Sarasola
9/19/2023	Case Closed	PR Chair	Dr. Don Thomas —
9/26/2023	Case Closed	L. Tucker	Dr. Stephen Peirce
Quarter 4			
10/17/2023	Case Closed	PR Chair	Dr. Don Thomas —
11/6/2023	Ref. PT. \$3,701.40	L. Tucker	Dr. Cecil Abraham
12/11/2023	Ref. PT. \$7,650.	PR Chair	Dr. Gary Palsis
12/11/2023	Still Open	PR Chair	Dr. Wade Winker —
12/11/2023	Case Closed	L. Tucker	Dr. Ethan Pansick
12/13/2023	Case Closed	L. Tucker	Dr. Ethan Pansick