

MINUTES - BOARD OF DIRECTORS MEETING

April 16, 2024 – Videoconference, 7:00 PM

Attendees

Board Members – Kyle Milliman, Chris Alvey, Jim Roach, Jeff Henderson, Stephen Foster, Monica Vogel, Joe Dobos, Rachel Donato, Eric Miller, Kevin Wroblewski, Sarah Wroblewski, Devonie Townsend, Tracy Rudd

Others – Prof Jason Fettig, UM Director of Bands

1. Call to Order – 7:03 pm
2. Meeting Minutes Approval – Minutes from January 2024 meeting: Motion to approve, Stephen; second, Jeff; motion passed.
3. Conductor's Forum – We were pleased to have new DoB Jason Fettig join us for this first portion of our meeting. Board members introduced themselves and shared their backgrounds, Prof. Fettig briefly shared some of his vision for the UM Band programs, and we enjoyed an informal Q & A session before he left the call.
4. President's Update (Eric)
 - 2025 MMB European trip - Details on MMB website (Germany and Austria, June 26-July 13, 2025). If an accompanying alumni trip is planned, that information will be shared at a later date.
 - Last Friday's Symphony Band concert was reported to be great!
 - Planning to get an UMBAA membership email to new grads before Homecoming registration opens up
5. Review of Action Items (Eric)
 - a. MMB Mentorship Project – On Hold (no updates)
 - b. Merchandise – Alumni Band apparel (Chris) – lots to report; will cover at end of meeting
 - c. Away Game Excursion – Indiana Nov. 9 (Eric, Tex) – Eric confirmed that Tex is on board, but still on Eric's plate to follow up and get things rolling.
 - d. Website security upgrades (Jim K) - no updates
 - e. Social media, Twitter/X vs Instagram (Kyle, Monica) – Kyle has started looking at how to coordinate Facebook and Instagram postings; a "Meta Business Suite" looks like the way to go. It is free. Devonie has some experience with that for her business. Further investigation still needed. Monica checked our bylaws for anything specific about social media, and there is nothing, which is not surprisingly given that the bylaws were largely written before social media was a thing. **ACTION:** Kyle and Monica will dig into this more before our next board meeting.
6. Treasurer's Report / Finance Committee (Jeff)
 - a. Treasurer's Report – Jeff shared & discussed finances for the fiscal year to date (July 2023-March 2024). Chris will post a copy to Google Drive with these minutes.
 - i. Jeff has yet to get word on where to send the check with the funds we approved to support the Rose Bowl Reunion event in LA. Eric indicated that Jeff should send the check (written to MMB) to Revelli; Eric will make sure KB knows it's coming and she will allocate it appropriately. Amount: full amount of what we approved, i.e. \$4000.

- ii. New Finance Item #1: Jeff has been looking into better returns for UMBAA savings, currently earning about 0.02% interest in our PNC Bank money market account. Details of what he found are included in the Treasurer's Report. His recommended option is Vibe Credit Unione (CU) which currently offers a high-yield (HY) savings account at 3% interest and 6-month CDs with a return of 5.1%. Jeff proposed moving about 50K of our 60K in PNC Savings to a combination of HY savings and 6-month CDs. **MOTION from Jeff for the Finance Committee (no second required):** *Authorize the Treasurer to to open a HY Savings Account at Vibe CU, and use the account to maximize safe returns on existing funds.* Discussion was generally favorable. Devonie suggested Vanguard brokerage funds as a possible alternative to the CU accounts. **Motion was tabled with an ACTION for Jeff** to follow up with Devonie and discuss/research further, for an e-vote to be taken later.
 - iii. New Finance Item #2 – UMBAA annual gross receipts in the last couple of years have increased (largely due to Homecoming ticket money passing through) to a level >\$50,000 and that requires a slightly more complicated tax return form. Jeff would like professional help with that, for this first year at least, to be sure it's done correctly. Additional notes are included in the Treasurer's Report. **MOTION from Jeff for the Finance Committee (no second required):** *Authorize the Treasurer to engage with Family Tax Advantage professional services to support tax filing for Calendar Year 2023, amount not to exceed \$1000. Motion passes.* (Note filing deadline is May 15.)
 - b. Auditor's Update (Chris, Rachel) – Reviewed all account statements through March 2024; no concerns.
 - c. Scholarships – In discussing the Treasurer's report, Jeff noted that we have increased our annual scholarship amounts to about \$35,000, about what we decided to aim for several years ago. The estimated "expendable fund value" annually based on our current assets is \$68,000 so we still have funds to spare..
 - d. Funding Requests/Items on the horizon
 - i. Concert Band Instrument Fund – Eric reached out to Richard (Frey) & John (Pasquale); they're still interested, and will join next meeting to discuss.
 - ii. Website maintenance/enhancements – no updates
 - e. Sponsorship for Side-by-side Concert (Eric, Jeff): UMBAA provided support for March 17 UM Concert Band performance with students from Detroit (as discussed and approved by e-vote in February for an amount not to exceed \$1000). The concert was a success and Courtney (Snyder) thanks us!
 - f. Fundraising Subcommittee –
 - i. Golf Outing (Mike K) Eric confirmed planning is ongoing. If anyone has ideas for sponsorships, let Eric know.
7. Homecoming (Devonie)
- a. General Homecoming updates (Devonie) – No updates at this time (will start rolling in summer).
 - b. Awards list – No updates
 - c. Flag silks (Sheri) – no updates
8. Other Reunions

- a. Maybe try to engage some concert band folks in 2025? Joe notes that MSU has been doing a concert band alumni event in the spring for many years. **Add to agenda for next meeting.**
- 9. Other Committee Reports
 - a. Membership Activities Committee (Tex, Eric):
 - i. Concert Events – UMS / Symphony Band / Other – no updates
 - ii. Away Game – Indiana Nov. 9, discussed briefly under Action Items above
 - iii. Other Events – No updates
 - b. Communications Committee (Kyle, Monica)
 - i. Membership Update – No updates
 - ii. Website (Jim K) – No updates
 - iii. M Fanfare – No updates
 - iv. M-Notes (Kyle) – No updates
 - v. Social Media (Kyle, Monica) – Continuation of discussion started under Action Items above. Kyle has been exploring during the meeting and found that everyone who's a Facebook Admin (for our UMBAA page) would have access to the Meta Business Suite, and could post from there to both Instagram & Facebook. He suggests we create an Instagram account around the time the first Homecoming registration email goes out. **ACTION** for Communications Committee. Kyle will reach out to Izzy to see how MMB manages this for their social media.
 - vi. New Item – Kyle proposes changing communication 'defaults' so that communications/requests from SMTD or MMB to UMBAA go to the whole board, not just President/VP. No objections raised. **ACTION** for Communications Committee.
 - c. Governance Committee (Tex, Jim, Monica) – Monica: should we have something in bylaws about social media? Eric – what we have now is standing rules for UMBAA Facebook group. **ACTION:** Monica will look into what might be appropriate in this area.
 - d. Ensembles Committee (Jim K)
 - i. Concert Band Subcommittee – No formal updates (Jim K not present); Spring Concert Band performance just took place (Sunday April 14).
 - ii. Pep Band Subcommittee (Tracy) – first softball gig was tonight! Tracy also gave a quick listing of upcoming gigs. Jeff & Eric noted conductors need to be paid for this year (we were late doing this last year).
 - e. Nominations Committee (Kyle)
 - i. New candidates for next year's Pres/VP – no volunteers yet! Eric and Kyle are trying to make it a community effort, less "top down" than it's been, and they will help whoever steps up!! Contact them if you're interested.
 - ii. Election of a Chair for General Meeting at Homecoming this fall (neither Eric nor Kyle will be present) – let Eric know if you're interested; we will confirm someone at the next meeting.
 - f. Student Liaison (Sarah, Kevin, Issac) – Either Sarah or Kevin will be at the MMB spring meeting; Issac will be there if he can.
 - g. New Member Lunch (Devonie) – No current updates.

- h. NAOAB Liaison (Jim R) No updates from Jim. Update from Eric: if you're interesting in trip to Montana (late May/early June) to represent UMBAA at the NAOAB national meeting, contact Eric.
 - i. Merchandise (Chris)
 - i. Summaries of discussions with Underground Printing (UGP) and Merchandise Subcommittee are on Google Drive website. Decisions needed on (1) scheduling of Pop-Up store, (2) items to include, and (3) new idea (since last meeting) about purchasing baseball hats for all Homecoming registrants, independent of the Pop-Up store.
 - ii. Re (1) scheduling: **ACTION** for Chris, check with UGP on expected timing from when the online store closes through printing/shipping of items; come back to Board with proposed dates for the store.
 - iii. Re (2) items to include, Chris suggests keeping it relatively simple with just 4 items: two polo shirts (men's & women's sizes), long-sleeve tees, and short-sleeve tees. Consider adding rain jackets or other items in future years. Samples of all proposed items (including rain jackets and baseball hats) will be available at UGP for us to see before making a final decision. Chris asked who else might like to see things in person; Devonie and Stephen are interested, so Chris will be in touch with them.
 - iv. Re (3) purchasing baseball hats for all Homecoming registrants: Board was supportive of this idea (generally favorable discussion, no objections). It would give us a uniform appearance on the field while still allowing for different shirt preferences, and attendees would likely appreciate hats being provided for them. Cost quoted by UGP is \$19.96 each for 300 hats. In future years we could continue offer them to any registrants who didn't already get one - e.g. "check this box on the registration form if you need a hat." (We don't anticipate there would be much, if any, abuse of that offer.) **ACTION** for Chris: check with UGP on pricing for a larger number, e.g. 400 or 500 hats; we may consider 'stocking up' for future years at a lower price point. *(UGP quote also added sales tax, but note as a 501(c)(3) charitable organization we should be exempt from paying sales tax.)*
10. Future Dates:
- a. Next Board Meeting: June 18, 2024, 8:00 PM
 - b. Homecoming: September 14, 2024
 - c. Upcoming Concert Dates and Events – No updates
11. Review New Action Items
- a. Chris - Merchandise Plans: Check with UGP on printing/shipping time, and come back to the Board with proposed dates for the Pop-Up store; check with UGP on pricing for 400 or 500 baseball caps; contact Devonie & Stephen about going in to see sample items at the UGP store.
 - b. Kyle and Monica – Continue looking into social media improvements e.g. Meta Business Suite for Instagram & Facebook, and possible additions to our bylaws with respect to social media.
 - c. Jeff – Further research on options for earning better returns on our Savings.
12. For the Good of the Association – Joe has identified a couple of items for the "Other Reunions" category: 2024 September is 60th anniversary of the move to the new School of Music; 2025 is 90th anniversary of Revelli coming to Ann Arbor
13. Adjournment – Motion, Kyle; second, Monica; Meeting Adjourned at 9:20 pm.

April 2024 Finance Update

FY2024: July 2023 - Mar 2024



Prepared by

Jeff Henderson

Prepared on

April 14, 2024

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FY2024 Profit and Loss by Month

July 2023 - March 2024

	Jul 2023	Aug 2023	Sep 2023	Oct 2023	Nov 2023	Dec 2023	Jan 2024	Feb 2024	Mar 2024	Total
INCOME										
Alumni Concert Band										0.00
Concert Band Participation Fees		1,720.00	880.00	40.00			1,240.00	80.00		3,960.00
Total Alumni Concert Band		1,720.00	880.00	40.00			1,240.00	80.00		3,960.00
Giving								1,150.00		1,150.00
Concert Instrument Fund	75.00	340.00				700.00		250.00		1,365.00
Endowment (General)	110.00	910.00								1,020.00
Total Giving	185.00	1,250.00				700.00		1,400.00		3,535.00
Golf Outing										0.00
Mulligans	20.00	115.00								135.00
Participant	2,430.00									2,430.00
Putting Contest		-440.00								-440.00
Raffle Tickets		1,220.00								1,220.00
Skins	30.00	210.00								240.00
Sponsor	3,700.00	-400.00							1,000.00	4,300.00
Total Golf Outing	6,180.00	705.00							1,000.00	7,885.00
Homecoming										0.00
Homecoming BBQ	105.00	75.00								180.00
Homecoming Participation Fee	1,590.00	2,910.00	-30.00							4,470.00
Homecoming Participation Game Ticket	3,180.00	5,820.00	-60.00							8,940.00
Total Homecoming	4,875.00	8,805.00	-90.00							13,590.00
Membership										0.00
Membership - Annual	1,720.00	5,140.00	2,820.00	1,120.00	660.00	460.00	360.00	120.00	160.00	12,560.00
Membership - Associate				10.00						10.00
Membership - Lifetime	400.00	400.00	400.00		400.00					1,600.00
Total Membership	2,120.00	5,540.00	3,220.00	1,130.00	1,060.00	460.00	360.00	120.00	160.00	14,170.00
Other Revenue										0.00
Interest Income	0.47	0.47	0.43	0.49	0.45	0.44	0.52	0.48	0.47	4.22
Total Other Revenue	0.47	0.47	0.43	0.49	0.45	0.44	0.52	0.48	0.47	4.22
Total Income	13,360.47	18,020.47	4,010.43	1,170.49	1,060.45	1,160.44	1,600.52	1,600.48	1,160.47	43,144.22
GROSS PROFIT	13,360.47	18,020.47	4,010.43	1,170.49	1,060.45	1,160.44	1,600.52	1,600.48	1,160.47	43,144.22
EXPENSES										
Communications	80.00	80.00	80.00	80.00	80.00	92.00	92.00	92.00	92.00	768.00
Ensembles										0.00
Conductor Fees		1,000.00					1,160.00			2,160.00
Facility Rental						560.00	540.00			1,100.00
Supplies						0.00		318.10		318.10
Total Ensembles		1,000.00				560.00	1,700.00	318.10		3,578.10
Finance										0.00

	Jul 2023	Aug 2023	Sep 2023	Oct 2023	Nov 2023	Dec 2023	Jan 2024	Feb 2024	Mar 2024	Total
Bank Charges, Processing Fees	32.00	86.99	32.01	32.01	32.01	32.00	32.01	32.01	32.01	343.05
Dues & subscriptions	200.00								45.34	245.34
Insurance		250.00								250.00
Michigan Annual Report			20.00							20.00
Stripe Fees	192.04	391.56	60.88				45.26	2.92		692.66
Stripe - Membership Dues	74.80	240.70	108.98	49.28	40.94	20.24	16.14	5.28	7.04	563.40
Total Stripe Fees	266.84	632.26	169.86	49.28	40.94	20.24	61.40	8.20	7.04	1,256.06
Total Finance	498.84	969.25	221.87	81.29	72.95	52.24	93.41	40.21	84.39	2,114.45
Golf Outing Expenses										0.00
Catering		1,000.00	8,651.45							9,651.45
Endowment (Golf Outing Proceeds)						4,248.00				4,248.00
Greens Fees		7,068.00								7,068.00
Prizes		971.00								971.00
Signage	880.86	8.48								889.34
Stripe Fee - Golf Outing	94.01	62.48								156.49
Total Golf Outing Expenses	974.87	9,109.96	8,651.45			4,248.00				22,984.28
Homecoming Expenses			2,664.25	449.52						3,113.77
Friday BBQ			4,403.50							4,403.50
Homecoming Game Tickets					18,600.00					18,600.00
Supplies		387.20		279.20						666.40
Total Homecoming Expenses		387.20	7,067.75	728.72	18,600.00					26,783.67
Membership Activities									1,143.50	1,143.50
Band Week Lunch		1,608.20								1,608.20
Endowment (General)						3,340.00				3,340.00
Remembrances			90.00							90.00
Total Membership Activities		1,608.20	90.00			3,340.00			1,143.50	6,181.70
Total Expenses	1,553.71	13,154.61	16,111.07	890.01	18,752.95	8,292.24	1,885.41	450.31	1,319.89	62,410.20
NET OPERATING INCOME	11,806.76	4,865.86	-12,100.64	280.48	-17,692.50	-7,131.80	-284.89	1,150.17	-159.42	-19,265.98
NET INCOME	\$11,806.76	\$4,865.86	\$ -12,100.64	\$280.48	\$ -17,692.50	\$ -7,131.80	\$ -284.89	\$1,150.17	\$ -159.42	\$ -19,265.98

NOTE

Homecoming income figures distorted by impact of cross fiscal year registrations.

Open Tasks:
None

FY2024 Profit and Loss by Month w/o Golf Outing

July 2023 - March 2024

	Jul 2023	Aug 2023	Sep 2023	Oct 2023	Nov 2023	Dec 2023	Jan 2024	Feb 2024	Mar 2024	Total
INCOME										
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Total Alumni Concert Band		1,720.00	880.00	40.00			1,240.00	80.00		3,960.00
Giving								1,150.00		1,150.00
Concert Instrument Fund	75.00	340.00				700.00		250.00		1,365.00
Endowment (General)	110.00	910.00								1,020.00
Total Giving	185.00	1,250.00				700.00		1,400.00		3,535.00
Homecoming										0.00
Homecoming BBQ	105.00	75.00								180.00
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Total Homecoming	4,875.00	8,805.00	-90.00							13,590.00
Membership										0.00
Membership - Annual	1,720.00	5,140.00	2,820.00	1,120.00	660.00	460.00	360.00	120.00	160.00	12,560.00
Membership - Associate				10.00						10.00
Membership - Lifetime	400.00	400.00	400.00		400.00					1,600.00
Total Membership	2,120.00	5,540.00	3,220.00	1,130.00	1,060.00	460.00	360.00	120.00	160.00	14,170.00
Other Revenue										0.00
Interest Income	0.47	0.47	0.43	0.49	0.45	0.44	0.52	0.48	0.47	4.22
Total Other Revenue	0.47	0.47	0.43	0.49	0.45	0.44	0.52	0.48	0.47	4.22
Total Income	7,180.47	17,315.47	4,010.43	1,170.49	1,060.45	1,160.44	1,600.52	1,600.48	160.47	35,259.22
GROSS PROFIT	7,180.47	17,315.47	4,010.43	1,170.49	1,060.45	1,160.44	1,600.52	1,600.48	160.47	35,259.22
EXPENSES										
Communications	80.00	80.00	80.00	80.00	80.00	92.00	92.00	92.00	92.00	768.00
Ensembles										0.00
Conductor Fees		1,000.00					1,160.00			2,160.00
Facility Rental						560.00	540.00			1,100.00
Supplies						0.00		318.10		318.10
Total Ensembles		1,000.00				560.00	1,700.00	318.10		3,578.10
Finance										0.00
Bank Charges, Processing Fees	32.00	86.99	32.01	32.01	32.01	32.00	32.01	32.01	32.01	343.05
Dues & subscriptions	200.00								45.34	245.34
Insurance		250.00								250.00
Michigan Annual Report			20.00							20.00
Stripe Fees	192.04	391.56	60.88				45.26	2.92		692.66
Stripe - Membership Dues	74.80	240.70	108.98	49.28	40.94	20.24	16.14	5.28	7.04	563.40
Total Stripe Fees	266.84	632.26	169.86	49.28	40.94	20.24	61.40	8.20	7.04	1,256.06
Total Finance	498.84	969.25	221.87	81.29	72.95	52.24	93.41	40.21	84.39	2,114.45
Homecoming Expenses			2,664.25	449.52						3,113.77

	Jul 2023	Aug 2023	Sep 2023	Oct 2023	Nov 2023	Dec 2023	Jan 2024	Feb 2024	Mar 2024	Total
Friday BBQ			4,403.50							4,403.50
Homecoming Game Tickets					18,600.00					18,600.00
Supplies		387.20		279.20						666.40
Total Homecoming Expenses		387.20	7,067.75	728.72	18,600.00					26,783.67
Membership Activities									1,143.50	1,143.50
Band Week Lunch		1,608.20								1,608.20
Endowment (General)						3,340.00				3,340.00
Remembrances			90.00							90.00
Total Membership Activities		1,608.20	90.00			3,340.00			1,143.50	6,181.70
Total Expenses	578.84	4,044.65	7,459.62	890.01	18,752.95	4,044.24	1,885.41	450.31	1,319.89	39,425.92
NET OPERATING INCOME	6,601.63	13,270.82	-3,449.19	280.48	-17,692.50	-2,883.80	-284.89	1,150.17	-1,159.42	-4,166.70
NET INCOME	\$6,601.63	\$13,270.82	\$ -3,449.19	\$280.48	\$ -17,692.50	\$ -2,883.80	\$ -284.89	\$1,150.17	\$ -1,159.42	\$ -4,166.70

NOTE

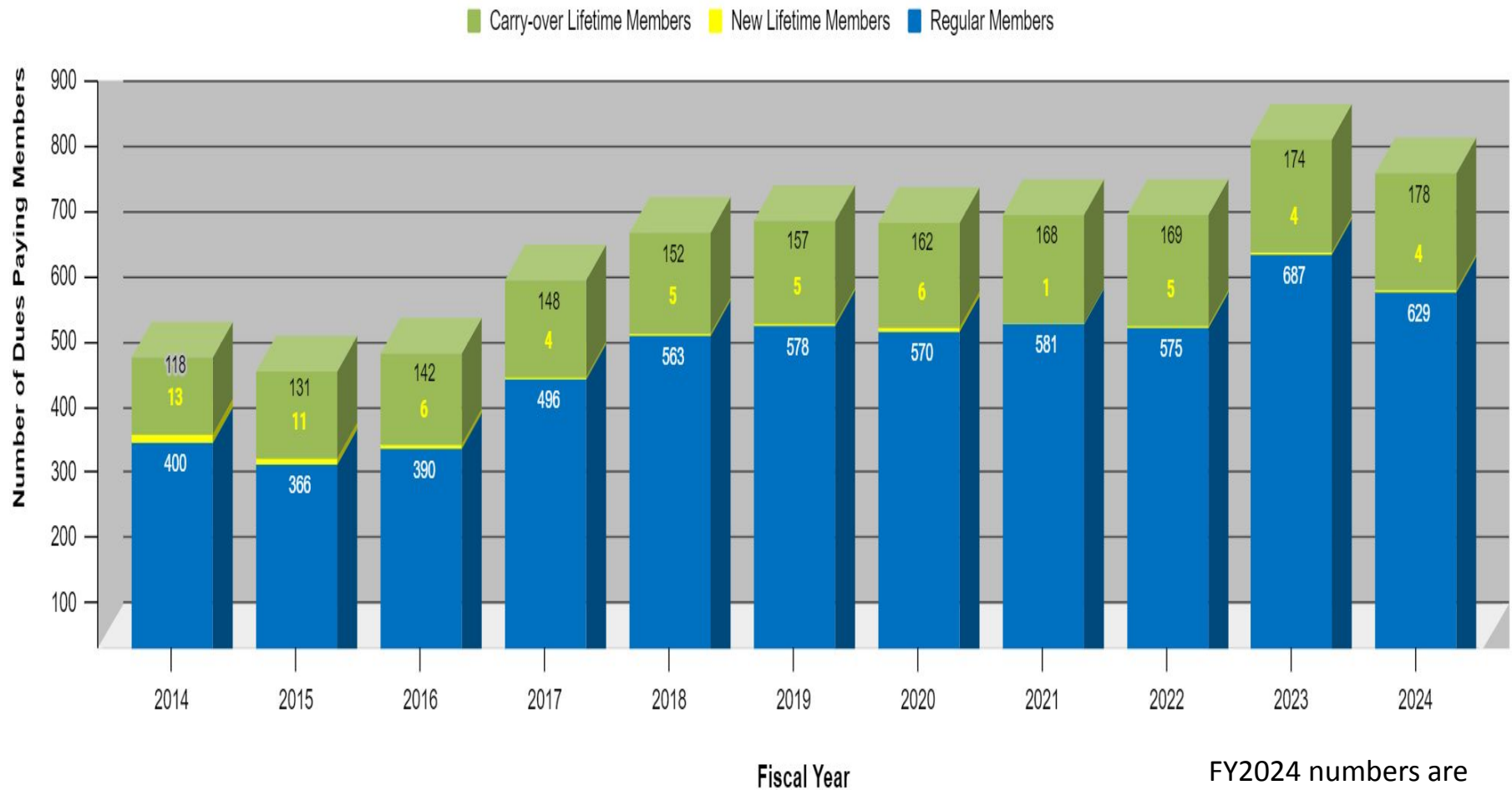
Homecoming results impacted by cross fiscal year registrations

Balance Sheet

As of March 31, 2024

	Total	
	As of Mar 31, 2024	As of Mar 31, 2023 (PY)
ASSETS		
Current Assets		
Bank Accounts		
PNC Checking	12,871.97	4,347.42
Concert Instrument Fund	0.00	0.00
Endowment Funds	0.00	0.00
Total PNC Checking	12,871.97	4,347.42
PNC Money Mkt Savings	32,498.82	32,492.76
Concert Instrument Fund	8,712.00	6,062.00
Endowment Funds	0.00	0.00
Lifetime Membership Funds	19,280.00	16,480.00
Total PNC Money Mkt Savings	60,490.82	55,034.76
Total Bank Accounts	73,362.79	59,382.18
Total Current Assets	73,362.79	59,382.18
TOTAL ASSETS	\$73,362.79	\$59,382.18
LIABILITIES AND EQUITY		
Liabilities		
Current Liabilities		
Credit Cards		
PNC Credit Card	261.35	351.21
Total Credit Cards	261.35	351.21
Total Current Liabilities	261.35	351.21
Total Liabilities	261.35	351.21
Equity		
Opening Balance Equity	38,504.55	38,504.55
Retained Earnings	53,862.87	40,378.70
Net Income	-19,265.98	-19,852.28
Total Equity	73,101.44	59,030.97
TOTAL LIABILITIES AND EQUITY	\$73,362.79	\$59,382.18

UMBAA Membership



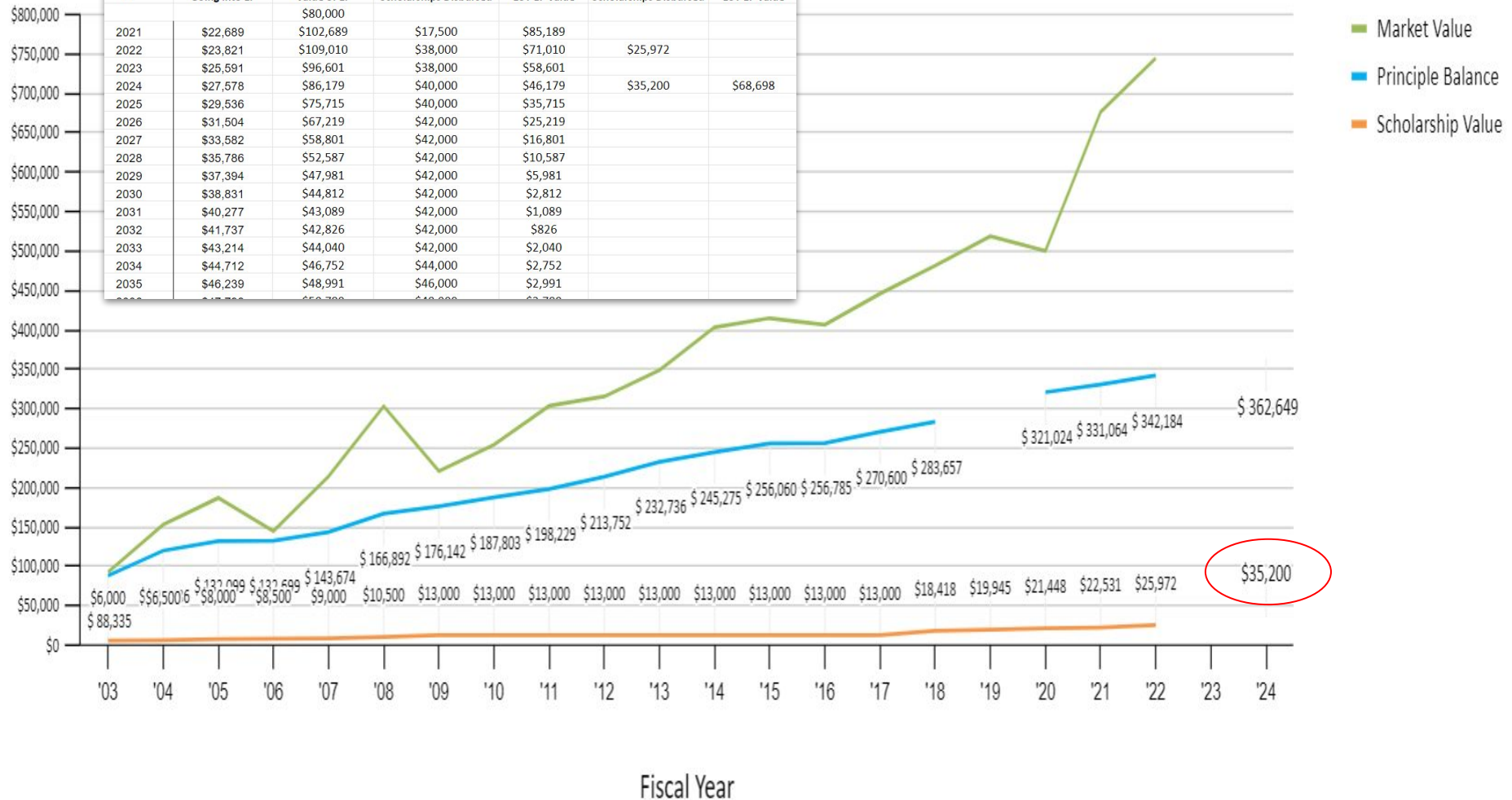
FY2024 numbers are incomplete - 3 months remaining

Scholarship Endowment Update

Rev: 31-Mar-2024

Expendable Fund Projection Table

FY	Plan				Actual	
	Going into EF	Value of EF	Scholarships Disbursed	EoY EF Value	Scholarships Disbursed	EoY EF Value
2021	\$22,689	\$102,689	\$17,500	\$85,189		
2022	\$23,821	\$109,010	\$38,000	\$71,010	\$25,972	
2023	\$25,591	\$96,601	\$38,000	\$58,601		
2024	\$27,578	\$86,179	\$40,000	\$46,179	\$35,200	\$68,698
2025	\$29,536	\$75,715	\$40,000	\$35,715		
2026	\$31,504	\$67,219	\$42,000	\$25,219		
2027	\$33,582	\$58,801	\$42,000	\$16,801		
2028	\$35,786	\$52,587	\$42,000	\$10,587		
2029	\$37,394	\$47,981	\$42,000	\$5,981		
2030	\$38,831	\$44,812	\$42,000	\$2,812		
2031	\$40,277	\$43,089	\$42,000	\$1,089		
2032	\$41,737	\$42,826	\$42,000	\$826		
2033	\$43,214	\$44,040	\$42,000	\$2,040		
2034	\$44,712	\$46,752	\$44,000	\$2,752		
2035	\$46,239	\$48,991	\$46,000	\$2,991		



- \$35,200 was distributed in scholarships during second half of CY2023
- Current expendable fund value approximately \$68,000

Finance Action Item #1: Find better option for UMBAA savings

- Current savings account with PNC only yielding 0.02%. Do not offer any better alternative
- Chart below shows options from credit unions in SE Michigan
- Primarily looking for best low risk options such as high yield savings and/or short term CD's.
- Vibe Credit Union is only one of three investigated offering HY savings and good short term CD rate
- **Recommended Action: Open HY Savings at Vibe and move most of savings from PNC to a combination of HY Savings and short term CD. Should yield \$700-\$800 earnings in next 12 months.**

		X	X	✓
	Current PNC Money Mkt Savings	UMCU	DFCU	Vibe CU
Savings Account Interest Rate	0.01%	0.85% on \$25k or more	0.02%	0.05%
HY Savings Available?	no	no	no	yes, 3% up to \$100k
Short Term CD's Available?	yes	1 yr promotion 5.1%, usually 3% range	7 month, 5%	6 month, 5.1%
Annual Fees	no	no	no	no
Locations	all over SE Michigan	Ann Arbor, Flint, Ypsi	Across tri-county area	Primarily Oakland County

Finance Action Item #2: *Find professional tax support for 2023 UMBAA tax filing*

- For non-profit organizations such as UMBAA with < \$50,000 annual gross receipts, a simple Form 990N e-postcard stating such is the only filing necessary.
- UMBAA has surpassed this annual receipt level the last couple years and now must move to slightly more complicated tax return Form 990EZ (now in \$80k range)
- Have contacted three recommended tax firms that specialize, in part, in non-profit tax returns. All three recommendations came from direct or indirect feedback from former or current UMBAA board members

Family Tax Advantage	203-322-4888	eric@famtax.com	Based on Connecticut and AZ	Eric Morson (KKP roots)	not local, expect cost to be in \$750 range	
Altruic Advisors	888-298-5297	altruic.com	Plymouth, MI	Ryan Hagen	Min \$1,250	
Edwards, Ellis & Associates	734-662-0277	annarborcpas.com	Ann Arbor	Jeff Miller	expect cost to be \$500 max	

- May 15 is filing deadline for 2023.
- **Recommended Action: Engage with Family Tax Advantage to assist with 2023 UMBAA tax filing. Cost estimated to be < \$1000. This will help ensure we are within the guidelines from a tax filing perspective.**