



**AVENUES INSURANCE BROKERS INC.**

## **FIRST MEETING FOR 2025**

**Date:** January 9, 2025

**Location:** AIBI Conference

**Participants:** RRI, JVM, FBS, MAM, AFA, HES

*With Follow up Meeting : January 13, 2025*

**Participants:** RRI, MNLA JVM, FBS, MAM, AFA, HES

---

### **Main Discussion Points**

#### **1. 2024 Claims Report**

- Reviewed details of paid, outstanding, and denied claims.

#### **2. 2024 Renewal Notice Analysis and 2025 Projections**

- Discussed renewal notices for 2024 and handed over projections for 2025 to MAM.

### **Other Concerns**

#### **2. Collection Signed-Off Reports**

#### **3. HMO Client Concerns**

#### **4. 2025 Production & Budget Projection**

- Review of the 2025 budget, highlighting projections for Revenues & Expenses. The CY 2025 budget still has to be approved after final review of income/projections.

#### **5. 2024 Budget: Projection vs. Actual**

#### **6. Proforma Template**

#### **7. Invoicing**