



AVENUES INSURANCE BROKERS INC.

Date: May 2, 2025

Location: AIBI Conference Room

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

Next Meetings:

- Collection Follow-Up Meeting: May 30, 2025
- **Second Quarter Meeting: July 25, 2025**
- Expected Participants for Q2 Meeting: RRI, MNLA, JVM, FBS, MAM, AFA, HES

Agenda:

1. First Quarter Income and Expense for 2025 vs. 2024
 - A detailed review of the financial performance comparing Q1 of CY 2025 with Q1 of CY 2024.
2. Overall Income and Expense for CY 2025
 - A year-to-date financial summary highlighting key income sources and major expenditures.
3. Comparative Income and Expense Report (9-Year Trend)
 - Presentation of a comparative financial analysis covering the past nine years to assess growth patterns and anomalies.
4. Claims Update Report
 - Summary of submitted, pending, and processed claims, including notable issues or delays.
5. Collection Report
 - Status update on outstanding receivables and collections progress per account.
6. First Quarter Renewal Analysis

- Analysis of renewal rates, customer retention figures, and performance against renewal targets.

7. Other Matters

- Prospective Accounts: Discussion of potential new accounts and prospects in the pipeline.
- Marketing Strategy: Review and enhancement of current marketing efforts; upcoming campaigns discussed.

Note:

This agenda will serve as a recurring framework for quarterly meetings. All participants are advised to keep their respective records updated in anticipation of consistent topics in future sessions.