

Date	Ck num	Payee/memo	Expense	Deposit	Balance
6/16/2025		Opening Balance			\$18,165.47
7/22/2025		deposit (batch 1)		\$800.00	\$18,965.47
8/21/2025	1078	Sue Miller - Reimbursement for food for Wine Event (8/20)	\$76.73		\$18,888.74
8/21/2025	1079	Phyllis Lancaster - Reimbursement for food for Wine Event (8/20)	\$238.40		\$18,650.34
8/26/2025		deposit (batch 2)		\$1,500.00	\$20,150.34
		deposit (batch 3)		\$3,200.00	\$23,350.34
9/15/2025	1080	Chris Genheimer - Reimbursement for Speaker Gifts	\$250.00		\$23,100.34
10/1/2025	1081	Greenboro CC Sept. 17, 2025 Meeting	\$1,913.50		\$21,186.84
10/3/2025		deposit (batch 4)		\$2,500.00	\$23,686.84
11/14/2025		deposit (batch 5)		\$1,700.00	\$25,386.84
12/1/2025	1082	Greenboro CC Nov. 19, 2025 Meeting	\$2,527.31		\$22,859.53
12/19/2025		deposit (batch 6)		\$1,050.00	\$23,909.53
1/26/2026	1083	Greenboro CC Jan. 21, 2026 Meeting	\$2,505.97		\$21,403.56
2/11/2026		deposit (batch 7)		\$300.00	\$21,703.56
3/13/2026		deposit (batch 8)		\$150.00	\$21,853.56
3/13/2026	1084	Chris Genheimer - Reimbursement for Additional Speaker Gift Card	\$50.00		\$21,803.56
3/19/2026	1085	NAEPC Dues	\$1,798.70		\$20,004.86
4/6/2026	1086	Greenboro CC March 18, 2026 Meeting	\$3,682.11		\$16,322.75
5/13/2026	1087	Jim Hefferan Mileage Reimbursement for May GEPC Meeting	\$156.60		\$16,166.15
5/28/2026	1088	Greenboro CC May 13, 2026 Meeting	\$3,505.97		\$12,660.18
6/2/2026	1089	All About Awards - Addison Gavel Plaque	\$192.15		\$12,468.03
6/2/2026		Ending Balance			\$12,468.03

Members 59 Member Dues \$7,375.00 Sponsor Fee \$2,000.00 Total \$9,375.00 2024-25 totals

Members 18 Member Dues \$2,700.00 Sponsor Fee \$500.00

10 \$1,500.00

8 \$1,200.00 \$500.00

7 \$1,050.00

2 \$300.00

1 \$150.00

58 \$8,700.00 \$2,500.00 \$11,200.00 2025-26 totals

2025-26 Total Revenue \$11,200.00
2025-26 Total Expenses \$16,897.44
Increase dues by \$100 would cover loss

2024-25 Avg. Meeting Cost \$1,963.40
2025-26 Avg. Meeting Cost \$2,826.97
\$863.57

Louis & Elm
Melanthe Shroyer
in front of sign
had pkg behind it
Dante tickets

Sponsorship?

President's letter

Document Repository on website

GREENSBORO ESTATE PLANNING COUNCIL, INC.
List of Officers & Board of Directors FY 2025-2026

President & Director:

Addison Maille, CPA (2019)
Carr, Riggs & Ingram, P.L.L.C.
1321 Long Street
High Point, NC 27262
Phone: (336) 884-0410
amaille@cricpa.com

Vice President & Director:

Christina Carmon Whitesell (2020)
Bank of America Private Bank
800 Green Valley Road, Suite 502
Greensboro, NC 27408
Phone: (336) 543-1332
Christina.whitesell@bofa.com

Secretary & Director:

Paula McMillan, CPA/PFS, CFP®, CEPA®, CDFA®, CGMA (2021)
Stearns Financial Group
324 W. Wendover Ave., Suite 204
Greensboro, NC 27408
Phone: (336) 230-1811
pmcmillan@stearnsfinancial.com

Treasurer & Director:

Christopher W. Genheimer, Attorney (2022)
Carruthers & Roth, P.A.
235 N. Edgeworth St.
Greensboro, NC 27401
Phone: (336) 478-1156
cwg@crlaw.com

Immediate Past President& Director:

Erin C. V. Bailey, Attorney (2021)
Tuggle Duggins, P.A.
400 Bellemeade Street, Suite 800
Greensboro, NC 27401
Phone: (336) 274-5264
ebailey@tuggleduggins.com

Directors-at-Large:

Susan Miller, CTFA, ATFA, Trust Officer (2023)
Piedmont Trust Company
800 Green Valley Road Ste 203
Greensboro, NC 27408
Phone: (336) 574-8679
sue.miller@piedmonttrust.com

Ashley Madden, CFP®, CPA, CEPA (2023)

GenCrest Capital Partners
603 Dolley Madison Rd., Ste. 200
Greensboro, NC 27410
Phone: (336) 235-6603
ashley@gencrestcap.com

Phyllis Lancaster, CFP (2024)

Mission Wealth
3608 W. Friendly Ave., Suite 100
Greensboro, NC 27410
Phone: (336) 676-6900
plancaster@missionwealth.com

Adam G. Kerr, Attorney (2025)

Kerr Law PLLC
3608 W Friendly Ave, Ste 203
Greensboro, NC 27410
336-808-5028
adam@kerrlawnc.com

Greensboro Estate Planning Council, Inc
Agenda for June 17, 2025 Board Member Meeting
Carr Riggs & Ingram

Agenda

1. Treasurer's Report – Addison
 - a. 2024-25 Results
 - b. 2025-26 Proposed Budget
 - c. Review of membership roles
 - d. 990 Review
2. 2024-25 Year in Review – Issues/Changes/Suggestions?
3. 2025-26 Meeting Sponsors
4. Meeting Dates
 - a. September 17th
 - b. November 19th
 - c. January 14th
 - d. March 18th
 - e. May 13th
5. Meeting Speakers (ideas):
6. Review of Roles/Duties
7. Ideas to bring younger professionals
8. Ideas to generate more attendance

Greensboro Estate Planning Council Inc.
Minutes of Annual Meeting of the Board of Directors
Held June 17, 2025

The Annual Meeting of the Board of Directors (the "Board") of the Greensboro Estate Planning Council, Inc. ("GEPC") was held on June 17, 2025 at 3:00pm at the offices of Carr, Riggs & Ingram (CRI) at 7025 Albert Pick Rd #300, Greensboro, NC 27409.

The meeting was called to order at 3:00pm by Addison Maille, President, who welcomed everyone to the meeting, extended gratitude for everyone's involvement.

In attendance were Addison Maille, Erin Bailey, Chris Genheimer, Christy Whitesell, Sue Miller, Adam Kerr and Paula McMillan.

Addison distributed the following documents for the meeting and upcoming year to all present: Agenda, Minutes of the Annual Meeting Held June 18, 2024, List of Officers and Board of Directors, GEPC Income Statement, Officer Duties, Operating Calendar, 6/18/24 Annual Meeting of the Board of Directors Minutes and Past Presidents Listing.

A motion to approve the minutes from the last annual meeting was made by Erin Bailey, seconded by Paula McMillan and the Board unanimously approved by voice vote.

Addison noted that he and Carr, Riggs & Ingram (CRI) would again complete the 990 after June 2025. The Board expressed gratitude.

2024 / 2025 Financial Review

Addison Maille, who served as Treasurer during the 2024 / 2025 fiscal year just ending, gave the Treasurer's Report. Addison discussed the Statement of Revenues and Expenses that he prepared, which showed total revenue of \$9,375.00 and total expenses of \$12,231.68, resulting in a cash deficit of \$2,856.68. At the beginning of the fiscal year, there was a cash balance in the bank account of \$21,022.15 and at the end of the fiscal year there was a cash balance in the bank account of \$18,165.47.

Addison discussed the 2024 / 2025 budget in depth, noting the total projected revenues were based on 64 members renewing and 5 sponsorships. In total he noted that 59 members renewed. Addison also discussed the higher meal expense and higher attendance.

After discussion, a motion was made by Chris Genheimer to approve the report which was seconded by Sue Miller, and the Board unanimously approved the report by voice vote.

2025 / 2026 Budget, Membership and Sponsorship

Addison Maille presented a proposed Budget for the 2025 / 2026 Fiscal Year. The proposed Budget showed total revenues of \$10,625.00 and expenses of \$12,250.00, with a projected deficit of \$1,625.00. Projected Revenues were based on 65 members with dues set at \$125 per member. The Board agreed that 65 was a conservative and appropriate membership projection for 2025 / 2026. The Board noted that the number of renewals is based on a net renewal figure; being that some members do not renew and some new members are added. The Board agreed that on a net basis it is accurate to expect a net increase of 3-5 members.

The Board noted that a total of 5 sponsors is accurate for Fiscal Year 2025 / 2026. The Board agreed to not include any revenues from Web Sponsorships for the 2025 / 2026 Fiscal Year.

The Board discussed the annual membership price of \$125.00 per individual and if that needed to be adjusted in any way for the 2025 / 2026 Fiscal Year. The Board felt it was time to increase the dues for the 2025 / 2026 Fiscal Year since it has been so long since we have had a dues increase. The motion to increase dues from \$125 to \$150 was made by Addison Maille, seconded by Sue Miller and the Board unanimously approved by voice vote.

Addison noted that as President he will send out the President's Letter this summer, encouraging members to bring guests. The Board reaffirmed that first time guests should have no charge and for any second time returning guests there will continue to be a \$30.00 fee.

Paula McMillian will update the 2024 / 2025 Fiscal Year membership application, noting Chris Genheimer as the Treasurer and will post on the website.

The Board discussed a need to clean up the listing of names on the website that includes current and prospective members to delete anyone who would obviously no longer be involved and/or duplicates. Board members were asked to send any updates to Chris Genheimer as the new Treasurer.

The Board reaffirmed that no electronic payments for membership dues will be accepted due to complications related to personal liability.

Meeting sponsorships were discussed, with five sponsors needed. Confirmed sponsors include: Carr, Riggs & Ingram (CRI), Kerr Law, NAEPC, Carruthers and Roth. Potential sponsors: Piedmont Trust Company, Stearns Financial Group

Chris Genheimer made a motion to approve the proposed Budget, Christy Whitesell seconded the motion, and the Board unanimously approved the Budget by voice vote. A copy of the said approved Budget is attached.

2024 / 2025 Meeting Dates and Speakers

Addison Maille led the discussion concerning the five meetings planned for the 2025 / 2026 Fiscal Year. GEPC's meeting venue would be the Greensboro Country Club (the "Club").

Addison Maille proposed meeting dates of September 17, 2025, November 19, 2025, January 21, 2026, March 18, 2026, and May 13, 2026. It was noted that all meetings would be scheduled for the main ballroom of the Club, but there is always the chance that we could be pushed to the back rooms.

The meeting format was revisited and confirmed to be as follows: 5:30pm: Open bar (New to start open bar before meeting); 5:45pm: Announcements; 6:00pm – 6:30pm: Program

The following meeting topics and presenters were proposed and agreed upon for the 2025 / 2026 Fiscal Year with the Board Member contact(s) for confirming the program noted.

- **September 17, 2025** Celebrity Estate Planning – What We Can Learn From Those Who Could Have and Should Have Known Better – Chris Genheimer [Member Contact(s): Chris Genheimer]
- **November 19, 2025** Tax Update - Unraveling the Big Beautiful Bill and What It Means to You and Your Clients – Keith Hiatt [Member Contact(s): Addison] (Note: If no bill passing, potential replacements include: Trust Document Guidance for Drafter – Piedmont Trust Company Member Contact: [Member Contact(s): Sue Miller]; Appraisals: Valuing Art and Collectibles – Unique Things You Found) [Member Contact(s): Sue Miller]
- **January 21, 2026** Economic Update – Where We Are and What We Should Be Thinking About Now – Bank of America [Member Contact(s): Christy Whitesell]
- **March 18, 2026** Understanding Behavioral Finance to Maximize Your Financial Outcomes -Fidelity [Member Contact(s): Erin Bailey / Sue Miller]
- **May 13, 2026** Name, Image, Likeness (NIL) What Estate Planners Need to Know – (Part 1) – James Hefferan [Member Contact(s): Chris Genheimer]
- **September [TBD] 2026 (2026 / 2027 Fiscal Year)** Name, Image, Likeness (NIL) What Estate Planners Need to Know – (Part 2) – James Hefferan [Member Contact(s): Chris Genheimer]

Erin Bailey proposed hosting a **Wine Tasting Event Wednesday August 27, 2025** at Tuggle Duggins, 400 Bellemeade St #800, Greensboro, NC 27401 to, in part, attract younger members and appeal to the overall membership's interest in networking. Matt Bailey's wine tasting services would be utilized for drinks. Erin Bailey estimates the cost for drinks to be \$500. Sue Miller suggested Costco appetizer trays for the food. [Member Contact(s): Erin Bailey (venue and drinks)/Sue (Costco trays)].

The Board set a deadline of mid-July 2024 to have all speakers secured prior to the President's Letter being sent.

Paula McMillan suggested that we explore another way to register new members than sending them to the Treasurer in separate individual emails each month, especially if we are in growth mode. Ideally, it would be best for the member to register their guests via the RSVP email for the specific meeting to make the administration easier and allow for the most accurate count. There are concerns with forwarding the RSVP meeting link to guests who are not members because they may not be able to get through the privacy wall, making it likely better for the member to do it themselves. The best option would be to test this a little when we have our new meetings set up for the new fiscal year. Members present verbally agreed. Addison Maille added that there is no reason for guests to have formal nametags made for a meeting, leaning toward them making their own with the provided nametags and pens.

2025 / 2026 Duties of Board Members

The Board reviewed the 2025 / 2026 Fiscal Year board members and the duties of the President, Vice President, Secretary, and Treasurer.

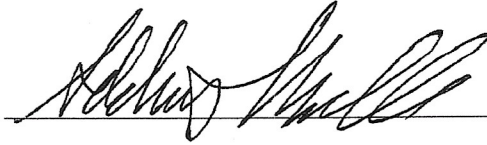
Addison Maille made a motion to adjourn, which was seconded by Christopher Genheimer, and the board unanimously voted to adjourn the meeting by voice vote. The meeting was adjourned at 4:50pm.

Respectfully submitted,

Paula McMillan

Paula McMillan, CPA/PFS, CFP, CEPA, CDFA, CGMA, Secretary (2025 / 2026)

Reviewed and approved,

A handwritten signature in black ink, appearing to read "Addison Maille", is written over a horizontal line.

Addison Maille, CPA, President (2025 / 2026)

GREENSBORO ESTATE PLANNING COUNCIL

OPERATING CALENDAR 2025-2026

JUNE – BOARD MEETING

- 1) Ask Secretary for Minutes of annual membership meeting.
- 2) Update the benefits of sponsoring a GEPC meeting.
- 3) Annual Meeting –
 - a) Finalize dates of membership meetings and tentative annual meeting.
 - b) New treasurer gets checking signature authority.
 - c) New treasurer gets website admin authority.
 - d) Assign 990-N filing to CPA on Board.

JULY – No meeting

- 1) Secure speakers and sponsors

AUGUST

- 1) Draft annual President's letter with attachments.
 - a) Schedule of speakers and sponsors.
 - b) Membership renewal.
 - c) Membership application for credentialed professionals.
 - d) Membership app for at-large.
- 2) Make sure website is updated for officers, speakers, sponsors, etc.
- 3) Send annual President's letter via email and postal mail.
- 4) Make sure Treasurer has speaker gifts ready.
- 5) Send first notice of September meeting.

SEPTEMBER – Meeting prep

- 1) Send second notice of September meeting.
- 2) Confirm September speaker attendance and equipment needed.
- 3) Send draft September meeting agenda to Board for comment.
- 4) Make sure club has received number of attendees and request for equipment.
- 5) Confirm that sponsor will attend meeting, and get sponsor comments to read in case they are not able to attend.

OCTOBER – No meeting

- 1) Send first notice of November meeting.

NOVEMBER

- 1) Send second notice of November meeting.
- 2) Confirm that 990-N was filed.

DECEMBER – No meeting

- 1) Send first notice of January meeting.

GREENSBORO ESTATE PLANNING COUNCIL

OPERATING CALENDAR 2025-2026

JANUARY

- 1) Send second notice of January meeting.
- 2) Confirm January speaker attendance and equipment needed.
- 3) Send draft January meeting agenda to Board for comment (meeting in Ballroom).
- 4) Make sure club has received number of attendees and request for equipment.
- 5) Confirm that sponsor will attend meeting, and get sponsor comments to read in case they are not able to attend.

FEBRUARY – no meeting

- 1) Send first notice of March meeting.

MARCH

- 3) Send second notice of March meeting.
- 4) Confirm March speaker attendance and equipment needed.
- 5) Send draft March meeting agenda to Board for comment.
- 6) Make sure club has received number of attendees and request for equipment.
- 7) Confirm that sponsor will attend meeting and get sponsor comments to read in case they are not able to attend.
- 8) Commission GEPC nominating committee.
- 9) Confirm annual meeting with Board of Directors.

APRIL – No meeting

- 1) Send first notice of May meeting.

MAY

- 1) Send second notice of May meeting.
- 2) Confirm May speaker attendance and equipment needed.
- 3) Send draft May meeting agenda to Board for comment.
- 4) Make sure club has received number of attendees and request for equipment.
- 5) Confirm that sponsor will attend meeting and get sponsor comments to read in case they are not able to attend.

JUNE

- 1) Annual Board Meeting.

GREENSBORO ESTATE PLANNING COUNCIL

OFFICER DUTIES

Duties of the President:

1. Call the Initial Meeting of the Board of Directors and Subsequent Meetings as required.
2. If President is a member of the Greensboro Country Club (GCC), contact them to reserve the dates for the upcoming year's meetings. If not a member of GCC, the President will delegate this responsibility to another Board Member who is a member of GCC. (We currently use Jim Tosco's membership to book our meetings at GCC.)
3. Correspond with GCC re meeting attendance, food, drink, A/V, setup.
4. Delegate responsibility for each meeting.
5. Preside at each meeting or delegate.
6. Coordinate with other officers and Board Members as necessary.
7. Appoint a Nominating Committee of four (4) members, each representing a different professional group of the membership, to submit a slate of officers and directors (including any replacements required) to be voted on at the annual meeting (final Membership Meeting for the fiscal year). Note: traditionally, the current slate of officers and directors stands for reelection and rotates through the officer positions according to the professional group classifications set out in Article V of the bylaws. However, the President retires and serves as "Immediate Past President". Thus, the Vice President will stand for election as the President; the Secretary stands for election as the Vice President; and the Treasurer stands for election as the Secretary. The next professional classification (in rotation) from the Board of Directors then stands for election as the Treasurer.
8. The annual business meeting of the Council shall be held each year at the final Membership Meeting for the fiscal year. A notice of the meeting, together with a report of the Nominating Committee shall be sent via email and/or US Mail to each member at least ten (10) days prior to the date of the annual meeting, and pursuant to Section VII of the Bylaws, said list of nominations shall set forth the manner in which other nominees for said vacancies to be acted upon, may be added.

Duties of the Vice-President:

1. Assist the President as requested.
2. Is responsible for presenting a list of recommended speakers and topics for all Membership Meetings to the Board no later than the Annual Board Meeting. The Vice President will also present a list of other proposed speakers and topics submitted to him or her during the course of the year, for consideration by the whole Board. The Board of Directors will make the final decision at the Annual Board Meeting.
3. Correspond with all speakers to confirm date, location, length of presentation, handouts and audio-visual needs.
4. Make final arrangements with all speakers (or delegate to another Board Member) and address any special requests by the speakers.
5. Coordinate with the Secretary as to the wording of the Meeting Announcements (speaker, professional job title and designations, and title of the presentation).

Duties of the Secretary:

1. Send out all Membership Meeting Announcements thirty (30) days prior to each meeting: the invoice for annual dues will be sent with the first Meeting Announcement.
2. Update and maintain membership application forms to email or mail to prospective new members.
3. Prepare notice of election as described under the list of Duties of the President. This notice needs to be sent at least ten (10) days prior to the meeting where voting occurs.
4. Take minutes at all Board Meetings and distribute them to all members of the Board within thirty (30) days of that meeting.
5. Maintain and update website, including but not limited to, membership applications, membership directory, calendar of events, and "patrons."

Duties of the Treasurer:

1. Financial transactions:
 - a) Prepare and make deposits; make copies of all checks.
 - b) Write checks and maintain back-up documentation.
 - c) Maintain checkbook; reconcile bank statements to check book.
 - d) Prepare cash disbursements ledger.
 - e) Keep dues paid schedule.
 - f) Prepare year-end Treasurer's report.
2. Name tags for Meetings:
 - a) Prepare new name tags as needed (Members & Guests).
 - b) Update name tags for changes in name, address, company etc.
 - c) Place name tags on table alphabetically prior to each meeting.
 - d) Store name tags between meetings.
3. Keep Secretary posted regarding membership as dues come in, including name, address, and member category.
4. Keep President posted regarding number and names of dues paying members.
5. Tally responses prior to each meeting and call the Greensboro Country Club regarding attendance expected (chair set-up and food). Adjust responses down by 10% for No-Shows.
6. Get gift certificates for speakers. Historically, we have used gift certificates from Barnes & Noble and Amazon - \$50 per speaker for regular programs.

GEPC Income Statement
2022-2026 fiscal year

	2021-2022	2022-2023	2023-2024	2024-2025	2025-26 budget	2026-27 budget
Deposits						
Membership renewals	\$7,500.00	\$7,275.00	\$7,625.00	\$7,375.00	\$8,700.00	\$9,000.00
Meeting Sponsor			\$2,500.00	\$2,000.00	\$2,500.00	\$2,500.00
Web Sponsor						
Total Income	\$7,500.00	\$7,275.00	\$10,125.00	\$9,375.00	\$11,200.00	\$11,500.00
Expenses						
Meetings	\$4,756.35	\$7,376.98	\$6,428.60	\$9,817.00	\$10,000.00	\$14,200.00
Gift Cards	\$300.00	\$200.00	\$300.00	\$260.00	\$250.00	\$250.00
Website NAEPC	\$1,600.00	\$1,600.00	\$1,600.00	\$1,621.00	\$1,625.00	\$1,625.00
Annual Dues NAEPC	\$175.00	\$175.00	\$175.00	\$175.00	\$175.00	\$175.00
Misc (plaque, etc)	\$165.73	\$160.13	\$175.06	\$358.68	\$200.00	\$200.00
Total Expenses	\$6,997.08	\$9,512.11	\$8,678.66	\$12,231.68	\$12,250.00	\$16,450.00
Surplus (deficit)	\$502.92	(\$2,237.11)	\$1,446.34	(\$2,856.68)	(\$1,050.00)	(\$4,950.00)
Notes						
Number of renewals	60	58	61	59	58	60
Number of meetings	4	5	5	5	5	5

	21-22	22-23	23-24	24-25	25-26
Sept	\$1,343.85	\$1,167.61	\$1,013.67	\$1,558.56	\$1,913.50
Nov	\$1,004.84	\$1,041.41	\$1,236.87	\$1,922.83	\$2,527.31
Jan	\$0.00	\$2,211.30	\$1,534.93	\$1,582.56	\$2,505.97
Mar	\$1,218.56	\$1,668.86	\$1,437.76	\$2,616.72	\$3,682.11
May	\$1,189.10	\$1,287.80	\$1,205.37	\$2,136.33	\$3,505.97
	\$4,756.35	\$7,376.98	\$6,428.60	\$9,817.00	\$14,134.86

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2022-2026 fiscal year

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Misc (plaque, etc)	\$165.73	\$160.13	\$175.06	\$358.68	\$200.00	\$200.00
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✓

	21-22	22-23	23-24	24-25	25-26
Sept	\$1,343.85	\$1,167.61	\$1,013.67	\$1,558.56	\$1,913.50
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