

A MANAGEMENT PROPOSAL  
TO THE

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# National Society of IT Service Providers

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FROM



2700 East Foothill Blvd. | Suite 209 | Pasadena | CA 91107

P: 626.292.1095

E: [info@associationmanagement.biz](mailto:info@associationmanagement.biz) | W: [associationmanagement.biz](http://associationmanagement.biz)

May 4, 2023

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*OFFICES*



May 4, 2023

Karl Palachuk  
Executive Director  
National Society of IT Service Providers

Dear Karl,

Re: Proposal for Association Management Services

Congratulations on your extraordinary association launching barely two years ago! I submit our firm's experience and credentials for consideration while you seek new association management as part of your growth. Reviewing your current needs, we appear to be a good fit for overall management, financial tasks, delivery of member benefits, and communications.

I'm going to suggest a two-stage mutual commitment that will best suit your fledgling financial picture and planned member growth. We are uniquely qualified to support NSITP as we understand growing organizations.

I trust our turnkey option will ultimately save you time and money as we layer on more service for 2024. Your board is encouraged to visit [www.associationmanagement.biz](http://www.associationmanagement.biz) which details all the services we offer you.

I welcome further discussion.

Most sincerely,

A handwritten signature in black ink, appearing to read "Patricia Rosengren". The signature is fluid and cursive, with a large, stylized initial "P".

Patricia Rosengren  
Principal

# Company Profile

## COMPANY HEADQUARTERS

Headquartered in southern California, we serve clients throughout the region and beyond. Pivoting to virtual meetings and events has allowed seamless service in a period filled with challenges. However, we also have returned to management of the important in-person events that enrich an association.

Our team is large enough to handle sizable assignments, but small enough to be nimble. Since 1985, Huntington's experienced professionals have addressed the business and promotional affairs of nonprofit education foundations, professional associations, arts and entertainment entities.

We offer turnkey services in all areas of administration, financial management, and marketing believing strongly that all communication techniques should be used with "one voice" for efficacy and branding.

Huntington has served groups with modest budgets and under heavy stakeholder scrutiny. This is why our business model has found favor with those who appreciate our complete transparency and no budget surprises.

Each of our staff handles a portion of your work coordinated by your primary Huntington executive. We have 1,700 sq. ft. of professional office space. You may hold board or committee meetings here if practical.

## TRANSITION PROCESS

While some transitions from one association management to another may have the potential for awkwardness, professionalism leads the way to a positive changeover. With much experience in this process, we have developed our own detailed form (Appendix A) with items that trigger conversation about important subjects making the transition from a volunteer manager or another AMC to our firm as seamless as possible and without losing details. In the best cases we've had full cooperation with the exiting management; in the worst, they were in jail.

We work quickly to have a meeting with the executive board. It is at that meeting that, should the board wish something to be procedurally different than what exists today, we welcome that direction. This also gives us time to submit the Change of Information paperwork to the State and begin the banking details.

We hope to identify and meet committee chairs within the first few weeks. Most transition items are addressed while simultaneously working on imminent events and meetings and setting those for the remaining calendar year.

## BOARD TRAINING

We feel strongly that your directors attend our Huntington Board Training module near the onset of our arrangement. It may be held in conjunction with a retreat or board meeting. Even long-term directors may learn subtleties about their opportunity for service. Less experienced board members become more prepared for success.

## CORPORATE STATUS

Huntington Association Management is a division (DBA) of Huntington Marketing LLC, woman-owned and operated by President Patricia Rosengren. Our corporation is not controlled by another entity.

TAX ID: 36-4835114

AFFILIATION: We are a member the California Society of Association Executives.

INSURANCE: We are bonded and insured. We carry standard business insurance with The Hartford brokered through US Asia Insurance Management Group. (See Appendix B)



# Meet Your Staff

## PRESIDENT

**Patricia Rosengren, Huntington's President,** launched the firm over 30 years ago and does strategic planning with boards toward reaching client growth and service initiatives. She helps guide board member search strategy and provides board training and retreat planning. Along with a deep background in corporate marketing, branding and charitable strategy, Pat can also provide crisis training. She publishes frequent articles on management and has guest lectured at universities in southern California. She holds a BS in Business Management & Marketing, minoring in the Arts. (35 years of experience)

## VP & DESIGN & DIGITAL DIRECTOR

**Peggie Chan, Vice President Graphics and Digital Management.** With nearly three decades of graphics and print background, Peggie designs and produces effective collateral and digital branding. She directs website and social media work for all clients keeping an eye on timing and consistency. From logos and invitations to annual reports and video production, Peggie guides in-house work and external contractors if needed. She owned her own graphics company prior to joining our firm. She has a Bachelor's in Humanities and is multi-lingual (Mandarin & Malay). (28 years of experience)

## FINANCE DIRECTOR

**Stella Cosso, Finance Director.** Stella handles all client accounts receivable and payable and is committed to accuracy and transparency. She works closely with your board treasurer to prepare monthly reports, handles online transactions and remote banking. There is full charge daily processing and monthly account reconciliation as well as year-end tax form preparation for our CPA. She deftly handles membership billing and sponsorship invoicing, doggedly chasing reticent payers. Stella is expert in QuickBooks and Microsoft Office. She graduated in Business from University of Sao Paulo, Brazil and is bilingual (Portuguese). (12 years of experience)

## ACCOUNT MANAGEMENT

**Cristina Henriquez, Account and Events Manager,** serves clients in general management and event production, both virtual and in-person. She handles the many details of events management from educational classes to golf tournaments. Earlier in her career, she managed a large medical clinic including compliance, accreditation renewals and facility operations. Multi-tasking is Cristina's art. She prepares vendor contracts, budgets, and develops efficient procedures for our clients. Cristina has a Bachelor's degree in Administration and is bilingual (Spanish). (7 years association experience)

## ACCOUNT MANAGEMENT

**Jenneva Guzman, Account and Communications Manager.** Jenneva came to Huntington from management responsibilities at the Luckman Fine Arts Complex, a nonprofit event venue, on the grounds of Cal State Los Angeles. Her experience in event production, education, and working with the public in stressful situations prepared her for association management of nonprofit groups with diverse expectations. Her ability to calm potential chaos is remarkable. Jenneva holds a Bachelor's degree in Psychology from Cal Poly Pomona and is bilingual (Spanish). (6 years of experience)

## ACCOUNT MANAGEMENT

**Danielle Fazzi, Administrator.** With a very broad customer relations background Danielle brings nearly eight years as corporate accounts manager and purchasing manager with a high-end custom food and catering company. Handling corporate and wholesales business, Dani was responsible for accounting, researching and development of products, and office management. Prior to that, she was in hospitality including production of special events. She received her higher education in New Hampshire and Massachusetts. (8 years of experience)

## ADMINISTRATOR

**Jasmine Ghiotto, Administrator.** With six years of experience in sales management for a large corporation, Jasmine comes with leadership and people skills in multifaceted environments. She is able to connect with an eclectic audience to accommodate our diverse client base. Prior to joining Huntington's team, she was Regional Sales Supervisor with Charter Communications leading and supporting a large sales team serving thousands of properties. As a people person, Jasmine is typically the first voice you hear when calling Huntington. She is bilingual (Spanish) and currently pursuing her Bachelor's Degree in Business Management. (6 years of experience)

## SOCIAL MEDIA MANAGER & WRITER

**Cathie Lou Parker, Social Media Manager and Writer,** is a seasoned Marcom professional. Cathie Lou served as copy chief for the *Los Angeles Times'* international news syndicate, edited an entertainment magazine in three California suburban daily newspapers and has been a journalist for three decades. She understands today's news environment. Cathie Lou applies her experience to client websites and social media content. She guides initiatives for the important charity sectors. Cathie Lou holds a Master's degree in Communications and has taught university journalism. (30 years of experience)

## WEB DEVELOPER

**Isaac Salazar, Web Developer,** brings breadth of experience to our clients having worked in a myriad of industries. He designs, maintains and optimizes our client websites. When appropriate, he creates e-commerce functions and online registration capability. Sam supports social networking functions and blogging posts. He is expert in hand-coding with various technologies including HTML, CSS3, JS PHP, Photoshop, UX and Wireframing technologies. Sam is certified in Google AdWords and Facebook Advertising. He earned a Bachelor's degree from Boston College. (15 year of experience)

## INVESTMENT & TAXATION ADVISOR

**Steven Roy** advises our clients in matters of investment and taxation. Steven holds an MS in Taxation from California State University, Fullerton, and professional designations in real estate investment, financial planning, entertainment finance, accounting and equine operations. Steven holds a California Real Estate licence. He is Managing Member and an Investment Advisor Representative for Cambyes Financial Advisors LLC. He is also an Enrolled Agent (Federal Registration #036074) and is enrolled to practice before the Internal Revenue Service's Compliance, Examination, Appeal, and Collections Divisions. He is available at an advisory fee to clients in the areas of tax and investment strategy. (39 years of experience)



# Initial Scope of Services to National Society of IT Service Providers (NSITSP)

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## SEASONED ADMINISTRATION

- ◆ Works with your Executive Committee and Board of Directors to meet objectives by producing and implementing a strategic plan.
- ◆ Administrative team conducts scheduling of all board and committee meetings and sends email reminders.
- ◆ Staff will attend and facilitate board meetings as required.
- ◆ Disseminate all board materials including agendas and other relevant documents.
- ◆ Distribute minutes.
- ◆ House, manage, and maintain all records, equipment, software, and supplies. (There may be a charge depending on storage volume.)
- ◆ Generate all necessary association forms.
- ◆ Any lobbying activity is supported by collateral which we will provide, including printed and digital messaging.

## FINANCIAL/DATABASE MANAGEMENT

- ◆ Manage all finances including accounts payable/receivable, invoicing, and reconciliation.
- ◆ Work with the treasurer to create the annual budget and a three-year projection.
- ◆ Nearly all our client accounts are at Bank of America where we have decades-long relationship with the management.
- ◆ We favor Intuit QuickBooks Online, Bill.com, Paypal, and Square among other billing and payment solutions. We discourage the use of Zelle.
- ◆ Frequent and transparent reporting is key. Your treasurer will have complete online access.
- ◆ Our financial advisor may recommend investments, manage collection activities, and facilitate scheduled audits as needed.
- ◆ Facilitate tax reporting. We work with a CPA who is focused in the nonprofit arena.

## MEMBER SUPPORT

- ◆ Courteous, effective, and timely responses to all members of the association are standard.
- ◆ Office is staffed 9 a.m. to 5 p.m. PDT, M-F, excluding holidays on which there will be away messages.
- ◆ Database management, including all aspects of membership processing, are managed by our team.
- ◆ We provide orientation information for new members, maintain directories for members and board members.
- ◆ Billing and administrative staff handles new and renewal membership and certifications.
- ◆ Create and conduct surveys to members and non-members as needed.

## WEBSITE/SOCIAL MEDIA/PUBLICATIONS

- ◆ With decades of experience, our in-house graphics and social media professionals are available to write and post content as supplied by your committee.
- ◆ Create and execute marketing plans, materials, and strategies for all events.
- ◆ Time-tested strategies attract and retain sponsors.
- ◆ Branding expertise will be implemented by our staff of creative professionals.
- ◆ The website calendar is updated as needed.
- ◆ Create and proof newsletters with content supplied by your committee for print or digital channels.
- ◆ Maintain email distribution lists through e-platforms.
- ◆ Research, write and disseminate press releases to consumer and related industry publications as appropriate.

# For Consideration: Included in the Second Layer of Service in 2024



## EDUCATION EVENT SERVICES

- ◆ Maintain a master event calendar.
- ◆ Run regional and national programs interfacing with CEU accreditation sources, as appropriate.
- ◆ Virtual webinars and in-person classes are produced.
- ◆ Facilitate and implement all manner of class scheduling, registration, and fee collection.
- ◆ We are adept at handling testing materials as well as facilitating the scoring of testing materials.
- ◆ Certificates of completion may be created in-house.
- ◆ Notify members of certification status.

Whether virtual or in-person, we have experienced staff to manage your meetings, education classes, or events.

## FULL MEETING AND EVENT PRODUCTION

- ◆ Manage annual events on location which includes program development, logistical support, recruiting sponsors, and other related duties.
- ◆ Identify and negotiate event site contracts as approved by the board of directors.
- ◆ Serve in an advisory capacity to the seminar chair(s) and the committee.
- ◆ Serve as primary point of contact with event venues by providing attendee count, special meal requirements, food and beverage selection, and technology needs by the requested deadline.
- ◆ With direction from the committee, secure seminar and event exhibitors/sponsors, coordinate agreements and payments.
- ◆ Design, distribute and oversee invitations, announcements, and updates to events in coordination with the chairperson.
- ◆ Create and set up online event registration via website or other event management software.
- ◆ Assist seminar and event participants with registration via web and phone.
- ◆ Manage pre-registration and on-site registration for seminars and events, as applicable, which includes the collection of payments.
- ◆ Prepare registration lists, nametags, signage, and materials for the seminars and other events.
- ◆ Run ticket sales and P & L reports for events.





# Service Retainer

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My staff and I look forward to providing top quality administration to the board and members of the National Society of IT Service Providers (NSITSP). We look forward to handling your administrative, financial, and communication requirements. We offer stability, seasoned management, and energy for your initiatives. I have included the functions you outlined, but are willing to discuss tasks now handled by other third parties as we go forward. This may have a positive budget effect.

Based on the information we have, we suggest a monthly retainer of \$4,300 per month for the first year. The suggested retainer includes all administration, accounting, marketing, graphics, and website updating. It does not include printing, postage, and travel expenses. Expenses for any of these would be preapproved by the board treasurer. If the volume of work changes or has been misunderstood, both parties will discuss an adjustment. A Letter of Agreement will be drawn up upon our selection.

I am eager to address any questions stemming from this proposal by phone, Zoom or in person. Thank you for considering us in your search.



## Professional References

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**You are welcome to contact our references that include three clients and one vendor.**

### **AMIE RYAN**

*Past National Chairperson*  
Hearth, Patio & Barbecue  
Association - Pacific Affiliate  
916.622.1224  
ryan@NFIcertified.com

### **GREG REYNEKE**

*Board Member and Past President*  
Pacific Water Quality Association  
801.376.8655  
gregreyneke@redfoxadvisors.com

### **JOE MARCHELEWSKI**

*Board Member and Past President*  
Public Relations Society of America  
- Los Angeles Chapter  
310.462.2252  
jmarchelewski@gmail.com

### **TED SAMS**

*Sales Management*  
Kandid Graphics & Printing  
626.241.7523  
tsams@kandidgraphics.com

## **Appendix A: Transition Checklist —Details, Details!**

## TRANSITION CHECKLIST

Association Name: \_\_\_\_\_

Key Volunteer Contact: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ E-mail: \_\_\_\_\_

Prior staff contact: \_\_\_\_\_

Liaison at national headquarters, if local organization: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ E-mail: \_\_\_\_\_

Fiscal Year End: \_\_\_\_\_ State of Incorporation: \_\_\_\_\_

Current Address: \_\_\_\_\_ New Address: 2700 East Foothill Blvd., Suite 209

Pasadena, California 91107

### FINANCIAL INFORMATION

#### Accountant/CPA

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ E-mail: \_\_\_\_\_

- ☐ Accounts payable—detail list
- ☐ Accounts receivable—detail list
- ☐ Amortization and depreciation schedules (if applicable)
- ☐ Assets: Merchandise or equipment
- ☐ Audits:
  - ☐ Accountant's audit, compilation or review for last three years
  - ☐ Final audit of association's financial records
- ☐ Bank reconciliation(s) from prior month
- ☐ Certificates of Deposits or any other investment instruments—list of
- ☐ Federal ID number: \_\_\_\_\_

- ☐ General ledger detail for current fiscal year—printout
- ☐ Investments list and strategy
- ☐ Taxes:
  - ☐ State sales tax exemption (if non-profit)—copy of
  - ☐ State tax returns for the last three years
  - ☐ Tax Exempt Status from the IRS—Federal and Letter of Determination
- ☐ Trial balance (last), including income/budget statement and balance sheet
- ☐ Other:
  - ☐ \_\_\_\_\_
  - ☐ \_\_\_\_\_

### INSURANCE POLICIES

- ☐ Convention cancellation
- ☐ Directors & Officers
- ☐ General liability

- ☐ Other:
  - ☐ \_\_\_\_\_
  - ☐ \_\_\_\_\_

### CONTRACTS WITH OUTSIDE VENDORS

- ☐ Accountant
- ☐ Attorney
- ☐ Tax Consultant/Preparer
- ☐ Membership Administrator
- ☐ Conference facilities
- ☐ Internet provider
- ☐ Lobbyist

- ☐ Printer(s)
- ☐ Resellers permits
- ☐ Surveys
- ☐ Other:
  - ☐ \_\_\_\_\_
  - ☐ \_\_\_\_\_

## GENERAL DOCUMENTS

- |  |   |
|--|---|
| <ul style="list-style-type: none"><li><input type="checkbox"/> Articles of Incorporation</li><li><input type="checkbox"/> By-laws—hard copy plus disk or e-mail of text</li><li><input type="checkbox"/> Calendar of upcoming meetings with locations</li><li><input type="checkbox"/> Corporate Seal</li><li><input type="checkbox"/> Databases:<ul style="list-style-type: none"><li><input type="checkbox"/> Hard copy, plus a disk or e-mail of databases</li><li><input type="checkbox"/> List of fields to be included in membership/other databases</li></ul></li><li><input type="checkbox"/> Documents used on a regular basis—hard copy plus disk or e-mail:<ul style="list-style-type: none"><li><input type="checkbox"/> Agendas and minutes from last two board meetings</li><li><input type="checkbox"/> "Drop" letter</li><li><input type="checkbox"/> "Thank you" for your interest in the association letter</li><li><input type="checkbox"/> "Welcome" to the association letter</li></ul></li></ul> | <ul style="list-style-type: none"><li><input type="checkbox"/> Frequently-Asked Questions (FAQs). Board to develop a list for the administrator of the 20 most commonly asked questions?</li><li><input type="checkbox"/> Membership brochure and application</li><li><input type="checkbox"/> Officers/committees:<ul style="list-style-type: none"><li><input type="checkbox"/> Board of directors roster</li><li><input type="checkbox"/> Committee chairs and members roster</li><li><input type="checkbox"/> Officer/committee charges, position descriptions and plan of work</li></ul></li><li><input type="checkbox"/> Policy manual—hard copy plus disk or e-mail</li><li><input type="checkbox"/> Postal permits</li><li><input type="checkbox"/> Strategic plan—hard copy plus disk or e-mail</li><li><input type="checkbox"/> Other:<ul style="list-style-type: none"><li><input type="checkbox"/> _____</li><li><input type="checkbox"/> _____</li></ul></li></ul> |
|--|---|

## ARTWORK & WEBSITE

- |  |  |
|--|--|
| <ul style="list-style-type: none"><li><input type="checkbox"/> Letterhead/Business Cards/Envelopes</li><li><input type="checkbox"/> Membership applications</li><li><input type="checkbox"/> PMS Ink color number(s)</li><li><input type="checkbox"/> Stat of logo—disk and camera-ready artwork</li></ul> | <ul style="list-style-type: none"><li><input type="checkbox"/> Website Information<ul style="list-style-type: none"><li><input type="checkbox"/> Domain/Hosting/FTP _____</li><li><input type="checkbox"/> Areas Linked to Hosting _____</li></ul></li></ul> |
|--|--|

## FILES

- |   |   |
|---|---|
| <ul style="list-style-type: none"><li><input type="checkbox"/> Meetings, conventions, trade shows, and other events held over the past three years</li><li><input type="checkbox"/> Membership directory, sample and file</li><li><input type="checkbox"/> Minutes from all board and committee meetings</li><li><input type="checkbox"/> Newsletters and other publications (all)</li><li><input type="checkbox"/> Nominations and Elections from the past three years</li></ul> | <ul style="list-style-type: none"><li><input type="checkbox"/> Perpetual plaques</li><li><input type="checkbox"/> Photo files</li><li><input type="checkbox"/> Proclamations, awards</li><li><input type="checkbox"/> Other:<ul style="list-style-type: none"><li><input type="checkbox"/> _____</li><li><input type="checkbox"/> _____</li></ul></li></ul> |
|---|---|

## INVENTORIES

- |  |  |
|--|--|
| <ul style="list-style-type: none"><li><input type="checkbox"/> Audio and video tapes</li><li><input type="checkbox"/> Membership certificates</li><li><input type="checkbox"/> Membership pins</li><li><input type="checkbox"/> Publications</li></ul> | <ul style="list-style-type: none"><li><input type="checkbox"/> Other:<ul style="list-style-type: none"><li><input type="checkbox"/> _____</li><li><input type="checkbox"/> _____</li></ul></li></ul> |
|--|--|

## TRANSITION ACTIVITIES

- |  |  |
|--|--|
| <ul style="list-style-type: none"><li><input type="checkbox"/> Assets—dispose of or relocate</li><li><input type="checkbox"/> Address relocation procedure</li><li><input type="checkbox"/> Change of address notice to:<ul style="list-style-type: none"><li><input type="checkbox"/> Allied organizations</li><li><input type="checkbox"/> All social media</li><li><input type="checkbox"/> Search engines (Google)</li><li><input type="checkbox"/> Members</li><li><input type="checkbox"/> Post office</li><li><input type="checkbox"/> Vendor list</li></ul></li><li><input type="checkbox"/> Educate staff on new association/FAQs, answering telephone</li><li><input type="checkbox"/> Signature cards (new), corporate resolutions from bank(s)</li></ul> | <ul style="list-style-type: none"><li><input type="checkbox"/> Set 12-month Meetings &amp; Events Calendar</li><li><input type="checkbox"/> Dovetail Industry's meetings calendar for conflict check</li><li><input type="checkbox"/> Develop "To do" list for upcoming events and activities</li><li><input type="checkbox"/> Telephone:<ul style="list-style-type: none"><li><input type="checkbox"/> Add association name to telephone directory listing</li><li><input type="checkbox"/> Order/change dedicated phone lines</li></ul></li><li><input type="checkbox"/> Website:<ul style="list-style-type: none"><li><input type="checkbox"/> Update new contact information</li><li><input type="checkbox"/> New instructions _____</li></ul></li><li><input type="checkbox"/> Other:<ul style="list-style-type: none"><li><input type="checkbox"/> _____</li></ul></li></ul> |
|--|--|

## PASSWORDS

- ☐ Supply log in requirements such as usernames, passwords, security codes, security questions & answers, and expiration dates:
  - ☐ Domain Names
  - ☐ Websites
  - ☐ FTPs
  - ☐ WordPress/Other Web Builder
  - ☐ Billing Programs
  - ☐ Database Programs
  - ☐ Social Media \_\_\_\_\_
  - ☐ Others \_\_\_\_\_

## ARCHIVES

- ☐ All other files, inventories, or items not listed above.
  - ☐ \_\_\_\_\_
  - ☐ \_\_\_\_\_
  - ☐ \_\_\_\_\_

## **Appendix B: Certificate of Liability Insurance**





# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
03/28/2022

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

<b>PRODUCER</b> Aero General Insurance Services 633 S. Brea Blvd., #106  Brea CA 92821-5308		<b>CONTACT NAME:</b> PHONE (A/C No. Ext): (877) 626-2376 FAX (A/C No.): (714) 871-0651 E-MAIL ADDRESS: npulone@aerogeneral.com	
<b>INSURED</b> Huntington Marketing, LLC 2700 E. Foothill Blvd., Ste. 209  Pasadena CA 91107-		<b>INSURER(S) AFFORDING COVERAGE</b> INSURER A: Sentinel Insurance Company NAIC # 11000 INSURER B: INSURER C: INSURER D: INSURER E: INSURER F:	

## COVERAGES

## CERTIFICATE NUMBER:

## REVISION NUMBER:


THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<b>GENERAL LIABILITY</b> <input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC			72 SBA BC0892 SC	03/15/2022	03/15/2023	EACH OCCURRENCE \$ 2,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 1,000,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000
	<b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> HIRED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> NON-OWNED AUTOS				/ /	/ /	COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
	<b>UMBRELLA LIAB</b> <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> DED <input type="checkbox"/> RETENTION \$				/ /	/ /	EACH OCCURRENCE \$ AGGREGATE \$
	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below				/ /	/ /	WC STATUTORY LIMITS <input type="checkbox"/> OTH-ER <input type="checkbox"/> E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (Attach ACORD 101, Additional Remarks Schedule, if more space is required)

## CERTIFICATE HOLDER

## CANCELLATION

( ) - ( ) -  TO WHOM IT MAY CONCERN	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  AUTHORIZED REPRESENTATIVE 
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*It's a fit!*



2700 East Foothill Blvd. | Suite 209 | Pasadena | California 91107  
P: 626.292.1095  
E: [info@associationmanagement.biz](mailto:info@associationmanagement.biz) | W: [associationmanagement.biz](http://associationmanagement.biz)