

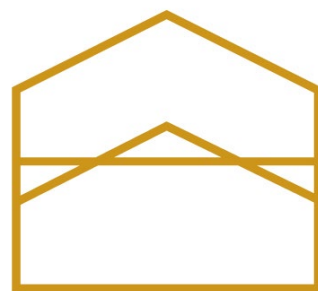
# GRAND ADVENTURE

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# Roundtable for Rookies

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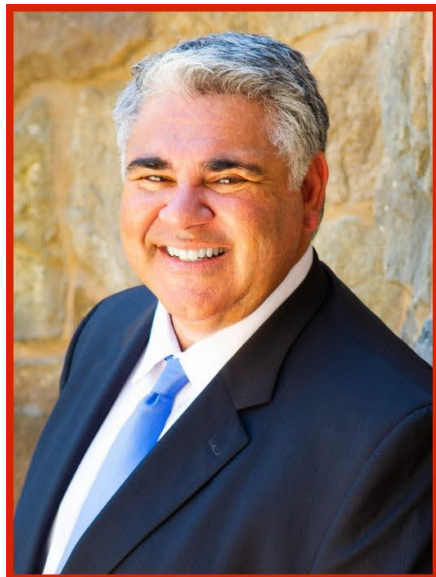
TRACE  
RESTORATION

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# PANELISTS



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Steven Roseman, Esq.  
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Financial Services

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# Session Outcomes & Takeaways

At the conclusion of this session, attendees will:

- Give yourself grace and take care of you!
- Participate in company trainings
- Keep your supervisor informed
- Continue to get education from CACM

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# Education/Knowledge

- Get Certified!
- ABCs of Management - Know the BASICS
  - Governing Documents
  - Financials & Budget Preparation
  - What is the Reserve Study
  - Davis Stirling Act



# Education/Knowledge

(continued)

- Board Meetings
  - Preparing for the meeting
  - Taking Minutes
  - Running the Meeting – Parliamentary procedure





# Daily Life of New Manager

- Ask questions – It's okay to not know an answer!
- The running task list – does it ever end?
- Email pitfalls
- Hard deadline vs Flexible?
- Get Organized
- Balancing priorities without toppling over



# Support and Care

- Support from senior management
- Form relationships
- Don't be too hard on yourself
- Celebrate your wins!
- Your part of a team – rely on them



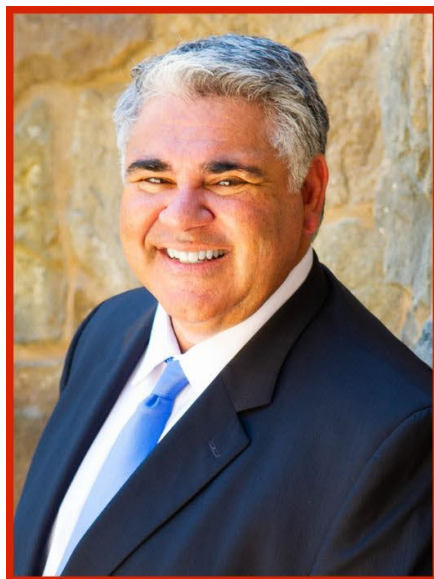


Q & A

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