

Rotary



Rotary Club of Tullahoma
October 28, 2022
What's A Cookin
Meal Service: 11:50
Program: 12:15

Club Leaders

Jack Thoma
President

Anthony Watts
President-Elect

Rachel Ferrell
Vice President

Brian Coate
Secretary

Linda Bean
Treasurer

Jody Baltz
iPast President

Hank Jordan
Club Administration Chair

Anthony Watts
Service Projects Chair

Jim Woodard
Club Membership Chair

Rachel Ferrell
Public Relations Chair

Upcoming Schedule

November 4 - tbd

November 11 - tbd

November 17 - 5 Loaves 4 Kids

Packing @ 8:45am

November 18 - tbd

November 25 - No Meeting

December 2 - Colonel Randel J.

Gordon

December 9 - tbd

December 16 - Jim Brown - NFIB

Sponsors

Platinum: NHC Health Care

Gold: FirstBank, Jacobs
Technology, Inc. & Quantitech
Inc.

Silver: Coca Cola Bottling, 1st
Choice Realtors, Financial
Management Advisors,

SmartBank, Morning Point, Stan
McNabb Automotive, Jim Devlin

Bronze: Traders Bank, Lester
Greene McCord & Thoma, Harton
Realty, Henry & McCord PLLC,
Housholder-Artman PLLC, Diane

Roger Roundy - Tax Code Strategist

Roger Roundy will be speaking to our Club on October 28th. Roger is the Owner/CEO of Strategic Associates, LLC. Strategic Associates is a Risk Mitigation firm focused primarily on the education and implementation of various tax code strategies, including tax code 831(b) (private re-Insurance). Throughout his years of risk management and tax mitigation services, Roger has helped 100's of business owners and individuals find solutions to protect their incomes from the wealth-eroding factors of risk and taxes. As the CEO and Director of Operations for 831(b) solutions with Strategic Associates, Roger thrives on providing value using innovative but sound insurance and planning solutions.

"Work hard, play harder; and provide opportunities for others to do the same" has been his M.O. during his business life. Roger has been married for 23 years and is the father to 5 wonderful children. He is an avid outdoorsman and loves to spend any spare time he can find either biking, skiing, snowmobiling, or hunting. Life is busy, and a passion for working with other successful business owners has directed his path to tax mitigation, including 831(b) and the extreme value and opportunity it provides to his clients.

Roger owns and sits on the board of 3 successful insurance and consulting firms and is often referred to as the 'visionary' within those firms. Growing up in the small town of Paradise, Utah created a foundation of working hard and playing harder, dedication to service and family, all along with finding innovative ways to provide value to those he connects with.

Roger has been a Rotarian since 2013 and is a member of the Cache Valley Utah Morning Rotary club. Roger has served on the board of the club, headed various services activities, and is a Paul Harris Fellow.

Bryant, Fran Marcum, Jim Jolliffe,
John Nauseef, First Vision Bank,
Pam & John Carver, Hank Jordan