

Wednesday, June 10, 2026 Meeting Minutes

Meeting Held at Daily Brew Co., 100 Washington St., Westby, WI

Open Networking – Members enjoyed drinks and food from Daily Brew Co. while conversing prior to the official meeting.

President's Welcome – Courtney Havel (Linda Schulte Filling In)

Members' 60-Second Introduction & Referral Requests

Mark McCraw | Abacus Answers LLC | CPA (Certified Public Accountant) offering small business accounting and tax preparations
| [Referral Request: \(ABSENT\)](#)

Courtney Havel | Bethel Home & Services | Senior living community providing a continuum of care to meet changing needs |
[Referral Request: CONGRATULATIONS COURTNEY!! \(Joy Moser filling in, Bethel Butikk is always looking for donations\)](#)

Scott Kring | Birch Point Distillery | In the process of building their distillery in Westby's business park; Will distill spirits made from sheep's milk | [Referral Request: This weekend, Don Hardy on Friday, Chug n' good eats will be here on Saturday. Having a helping hand will be great summer help.](#)

Rod Engh | Cade Financial Services | Retirement income planning, 401(k), IRAs, education savings plans | [Referral Request:](#)

[Education plans](#) 529 College Savings Plans

This is the most common type of education savings vehicle that we would likely recommend.

- Tax advantages: Contributions grow on a tax-deferred basis, and withdrawals are tax-free when used for qualified education expenses, including tuition, fees, room, and board.
- Versatile use: In addition to college, 529 plans can be used for K-12 tuition (up to \$10,000 per year), student loan repayments, and registered apprenticeship programs.
- Wisconsin plans: As a Wisconsin firm, Cade Financial Services would be familiar with the state-sponsored Edvest 529 and Tomorrow's Scholar plans.

529 Plan State tax laws and treatment may vary. Earnings on non-qualified distributions may be subject to income tax and a 10% federal penalty tax. Please consult your tax adviser for more information.

Custodial Accounts (UGMA/UTMA)

These accounts hold and manage assets for a minor until they reach the age of majority.

- Control over funds: Unlike 529s and ESAs, custodial accounts can be used for purposes other than education as long as it benefits the child.
- Financial aid impact: The assets in a custodial account are owned by the child, which can have a more significant impact on eligibility for financial aid compared to 529 plans.

Kevin Connelly (Carol) | Connelly Legal Services | estate planning, real estate transactions, probate work, small business setup |
[Referral Request: Looking forward to great weather!](#)

Jan Hesson | Daily Brew Co. | Coffee shop offering coffee, Lotus drinks, teas, baked goods, breakfast/lunch/dinner options |
[Referral Request: \(ABSENT\)](#)

Sara Rudie | Eagle Title Co. | Provides title insurance and property searches for lenders, realtors, lawyers; offers traveling closing and notary services in La Crosse, Monroe & Vernon Counties | [Referral Request: New summer help is now in the office, spread the word about Trout Fest happening in Coon Valley on the 20th with a day full of events.](#)

Mary Daines | Embroidery & More | Screen printing, embroidery, promotional products, patches, heat press | [Referral Request: Real life Polo perfect for golfing. Call Amanda at Embroidery and More if you are interested in having a customized Polo.](#)

Ryan Lium | Fleming Insurance Agency | WI & MN home, farm, auto, rental properties, individual and group health insurance, vacation homes, small businesses, workers compensation, fun toys | [Referral Request: \(ABSENT\)](#)

Jason Stuempges | Jason Ray Photography | Landscape photographer, offering prints for your home or office via website and craft fairs | [Referral Request: Jason will be at Artspire in La Crosse this weekend at Riverside park 10-5, find more out about the event here <https://www.facebook.com/artspirelacrosse>](#)

Steve (Cowboy) Pauloski | Leer Wood Products | Timber buyer of standing timber, cut logs; Assists with MFL program | [Referral Request: \(ABSENT\)](#)

Autumn Brandau | NextHome Prime Real Estate | Residential, commercial, vacant land sales and area property manager | [Referral Request: Autumn has her own listing coming on the market soon 3 bed 1 bath located in Rockland.](#)

Maja Grinsted Hillegass | PowerMedic | Makes and sells laser therapy equipment to accelerate natural healing | [Referral Request: If you know of anyone who is an acupuncturist locally or across the US.](#)

Katie Helseth | River Bank, Westby | Katie primarily manages the bank's business and farm loans | [Referral Request:\(ABSENT\)](#)

Hailey Nerison | The Wild Cowpoke Co | A unique mobile boutique offering women's western wear | [Referral Request: Spread the word about two events happening this week. Thursday is Norse Market here in Westby from 5-8. Vernon County Dairy Breakfast on Saturday from 7-11 at the Jared Fleming Farm.](#)

Steve Peterson | Top Dog Marketing | Website design, marketing assessments and strategies, project management; Primarily works with small-businesses and nonprofits | [Referral Request: How to make your website work for you? Make it look like an employee that works 24/7. How to keep the reader engaged and have a great selling point.](#)

Linda Schulte | Valley Fudge & Candy | Makes over 50 flavors of fudge for retail and wholesale throughout the U.S.; Main storefront located in Coon Valley | [Referral Request: National Fudge Day June 16th. Come out to Valley Fudge for special giveaways and fudge sampling.](#)

Dan Lee | 608 Plumbing & Heating | Residential and light commercial plumbing, heating, septic | [Referral Request: Busiest time of year for air conditioners. If you don't have up to day refrigerant call Dan to get it switched over and up to date.](#)

Referral Education / 1st Wednesday Referral Reality Check – Steve Peterson

- How many receive referrals in the group?
- Do you reach out in 24 or 48 hours or do you even forget

When you receive a business referral, prioritize speed and appreciation. Contact the prospect within 24 hours, update your tracking system, and thank the referrer. Failing to act quickly wastes the built-in trust and hurts your chances of closing the deal. Follow these critical steps right after a referral comes in:

Acknowledge and Thank the Referrer: Reach out immediately to the person who gave you the referral to thank them. A quick email, phone call, or handwritten note shows your appreciation and keeps you top-of-mind for future leads.

Log the Referral: Record the new lead's details and the referrer's name in your CRM or spreadsheet. Note who sent it so you can update them on the outcome Later.

Contact the Prospect Quickly: Reach out to the referred lead within 24 hours.

Mention the mutual connection immediately (e.g., "John Doe suggested I reach out...") to establish instant trust and warmth.

Identify Their Pain Point: Ask the prospect open-ended questions to understand exactly what they need. Focus on solving their problem rather than launching straight into a hard sales pitch.

Schedule a Discovery Call: Move the conversation to a brief, low-pressure

consultation. This allows you to outline exactly how your services can benefit Them.

Referrals are a powerful way to grow, but the process must be managed seamlessly. Remember that this possible relationship is monitored by the referral and the one who referred your business. Needs to be treated that way.

Vice President's Report – Linda Schulte

\$ 99,063.88 closed business year-to-date

9 referrals, 19 closed business mentions & 4 testimonials last week

Secretary's Report – Hailey Nerison

June 17th- Jan Hesson, Daily Brew

June 24th- 1:1 Conversations

10-Minute Business Spotlight Speaker: Autumn Brandau, NextHome Prime Real Estate

2 years with NextHome, agent for over a year and a half. Oldest of 5 from Wilton. Lives with her bf and fur babies.

- Most people think agents just show homes and easy work
Anyone can open a door but not everyone can find you a home

[Referral Presentation](#)

Referrals & Testimonials

Key: R (Referral); CB (Closed Business) & T (Testimonial)

Mark –

Courtney – **R** for Riverbank,

Scott – **R** for Mary, **R** for Linda, **CB** for Daily, **CB** for Dan

Rod – **R** for Scott, **CB** for Scott, **CB** for Daily

Jude –

Jan –

Sara – **CB** for Daily, **R** for Autumn

Mary – **CB** for Daily, **CB** for Bethel, **CB** for Scott

Ryan –

Jason – **CB** for Daily, **T** for Linda

Steve (Cowboy) –

Autumn – **CB** for Daily

Maja – **CB** for Daily

Katie –

Hailey – **CB** for Daily

Steve Peterson – **CB** for Daily

Linda – **CB** for Bethel, **CB** for Daily

Dan – **CB** for Daily

Kevin – **CB** for Daily

Total Referrals: 5

Total Closed Business: 15

Total Testimonials: 1

Door Prize Drawing

Daily Brew Gift Card

Winner: Sara

Community Events & Announcements

Burgers in the Park Planning | June 18th | Co-host PRN | Linda bringing easy up tent and fudge slab. Hailey bringing tables. Steve is bringing the banner. Maja is bringing displays.

- Steve is designing cards, sending them to Linda to get printed for an advertisement for Burgers in the Park and then to have them available at meetings.
- Please donate an item from your business and email it to Steve (get it to Steve before Monday to get your logo next to the listed item donated

Putting \$100 towards Charlotte for Courtney for a savings plan- Make a motion 1st- Mary, 2nd- Carol

Vernon County Dairy Breakfast on Saturday from 7-11
Larryfest 2 tickets for 250 for 3 day event

Inspirational Quote – Linda

"Every morning is a new beginning, a new blessing, and a new hope."

Meeting adjourned at 9:20

Important Links:

[PRN Website](#) | [Enter Closed Business Here](#) | [Zoom Link](#) | [Facebook Group](#)

Member List:

Abacus Answers LLC – Mark McCraw
Bethel Home & Services – Courtney Havel
Birch Point Distillery – Scott Kring
Cade Financial Services – Rod Engh
Coon Bali Yoga – Jude Steers
Daily Brew Co. – Jan Hesson
Eagle Title Co. – Sara Rudie
Embroidery & More – Mary Daines
Fleming Insurance Agency – Ryan Lium

Jason Ray Photography – Jason Stuempges
Leer Wood Products – Steve Pauloski
NextHome Prime Real Estate – Autumn Brandau
PowerMedic – Maja Grinsted Hillegass
River Bank – Katie Helseth
The Wild Cowpoke Co – Hailey Nerison
Top Dog Marketing – Steve Peterson
Valley Fudge & Candy – Linda Schulte
608 Plumbing & Heating – Dan Lee

2025-2026 Officers:

Leadership Team:

Courtney Havel, President
Linda Schulte, Vice President
Hailey Nerison, Secretary
Katie Helseth, Treasurer

Membership Committee:

Sara Rudie
Jason Stuempges
Steve (Cowboy) Pauloski

Visitor Hosts:

Mary Daines
Rod Engh
Jan Hesson

Referral Education:

Scott Kring
Steve Peterson

Scholarship Committee:

Mary Daines
Rod Engh
Jan Hesson
Mark McCraw

Media Committee:

Autumn Brandau
Maja Grinsted Hillegass
Steve Peterson

Social Committee:

Ryan Lium
Dan Lee
Jude Steers
Jason Stuempges

Growth Committee:

Linda Schulte
Jude Steers
