



"IN THE KNOW,  
AND ON THE GO!"

THE OFFICIAL MONTHLY NEWSLETTER FOR HERITAGE CLUBS INTERNATIONAL  
"THE PREMIER BANK MARKETING ORGANIZATION IN NORTH AMERICA."

## Message from our Board Chair



I want to wish everyone a happy Labor Day coming up this weekend. We all work hard in our jobs. I hope that you take time to relax and enjoy the fruits of your labor with family and friends in the coming days.

HCI is excited to announce the opening of Peer Group registration and I encourage all of you to register early for this wonderful conference. You won't want to miss the networking, education and travel information that is designed especially to help bank club directors and travel providers work together to make bank clubs successful on every level. We will be staying at The Essex Culinary Resort and Spa and they are offering a 15% discount on spa and culinary services, so plan to come early and take advantage of these treats.

Fall Forum registration continues as well and we already have more people attending this year than last. This year's re-training topic is something we can all benefit from. This one-day training is the perfect opportunity to polish your skills and learn (or re-learn) tips and tricks to be the most effective club director you can be. Take advantage of this unique opportunity in either Omaha or the Quad Cities.

Finally, don't forget to send in your story. We really want to hear about the special memories you have from your days and nights spent serving your members. Our jobs provide amazing opportunities to be involved with wonderful people in good (and sometimes, not so good) situations. Share the moments with us!

Be well!

Valerie Kelsey, CBDC



**2017 Peer Group**  
**On-line Registration is Now Open**

**March 13 - 17, 2017**  
**Pre-FAM Tour March 10 - 13**

The Essex Culinary Resort & Spa  
Essex , VT

Check out the FAM Tour details here

**Sign up today**

**CLICK HERE TO LEARN MORE OR TO REGISTER**

You can mail your payment or pay on-line

Contact Tina Goeske if you need assistance with registration  
877-881-0229

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**2016 Fall Forum - Registration now Open**  
**Rejuvenate Yourself, Rejuvenate Your Club**

**CLICK HERE TO LEARN MORE OR REGISTER**

Many of our current club directors never received the extensive HCI training that their predecessors did and those that did had it more than 15 years ago. That is why this year's Fall Forum is all about Club Director training.

Now HCI is inviting all of our club directors to a full day of retraining for today's existing bank clubs. We will not be covering topics to start a bank club (kick-off party and so on), but rather helping those with existing clubs, whether a new director or experienced.

**Offered in two locations - choose the one that works best for you!**

**Hotel Accommodations are just \$99 per night at either hotel.**

**Monday, November 7, 2016 - 9am to 4 pm**  
Radisson Hotel Davenport, IA

**Complimentary Pre-Fam Sightseeing tour on Sunday November 6 starting at 1 pm**  
**Sponsored by the Quad Cities CVB**

**Friday, November 11, 2016 - 9 am to 4 pm**

## [Magnolia Hotel Omaha, NE](#)

**Complimentary Pre-Fam Sightseeing tour on Thursday November 10 starting at 1 pm  
Sponsored by the Omaha CVB**

**The \$75.00 per person registration fee includes all materials, lunch and refreshment breaks during the day. Please invite others to join you - colleagues, spouses, even senior management - all are welcome.**

**IMPORTANT NOTE:** There is one part of the registration form that can be tricky. Where it says "Total number of Other Attendees not including yourself," do not include yourself. If you do, you will be charged too much. Enter only the number of *other* people who are coming with you.

[Click here to read full story](#)



## **Chicago's North Shore CVB Wants Your Members to Make a Great Memory**

Everyone knows that Chicago is a great destination with many cultural and historical attractions along with great restaurants. But did you know that there are just as many awesome restaurants and attractions bordering the city? Meet Caryn Shulman of Chicago's North Shore CVB located in Skokie, Illinois. She is one of HCI's newest partner members. Caryn has been with the CVB for 10 years and would love to plan an itinerary for your club that includes such wonderful attractions as the Baha'i Temple in Wilmette, the Dawes Mansion in Glencoe and the Illinois Holocaust Museum and Education Center in Skokie. The area also boasts quirky destinations such as the American Toby Jug Museum and the Mitchell Museum of the American Indian. Take a tram ride on your tour of the 385 acres of magnificent living plants at the Chicago Botanic Garden in Glencoe.



Caryn would love to get on your tour bus and welcome your members to the North Shore.

[Click here to read on](#)

## **Member Spotlight**

**Ann Howe, CBCD - Becky Brower, CBCD - Sandy Bacon, CBCD**

**Freedom Bank**

**Locations in Monona, Elkader and Postville, Iowa**

FreedomBank's FreedomClub promises you "Good Times with Good Friends." And it takes the efforts of three good friends to make it happen for their members: **Ann Howe, CBCD - Monona, IA; Becky Brower, CBCD - Elkader, IA; and Sandy Bacon, CBCD - Postville, IA.** These women have been working together for years, sharing the work, the travel and many



(L to R) Sandy, Ann, Susan Rosenberry,

inside jokes. "We do everything together," says Sandy.

and Becky)

They have one day-trip per month with two domestic or international destinations per year and at least two of them accompany every trip they take. They work it out among themselves which ones will go and which one will stay behind. This allows them to meet their own personal needs, their other bank responsibilities and the needs of their members. They will be heading to Cuba in February. Recently Susan Rosenberry from HCI Preferred Tour Operator Islands in the Sun posed with them for a photo while she was with them for their Cuba Travel Show. They haven't yet decided which two of them will be accompanying their group on this fabulous trip, but Becky and Sandy will be going on their motor coach trip to New York City later this month.

The ladies, who are all CBCD certified, have many goals for their club including keeping the trips affordable and meeting the members' requests for travel destinations. These women truly enjoy serving their members who they say are "a great generation that is appreciative" of their efforts.

They recall a story of one of their members whose wife did not care for travel and so he did not do much of it himself. He had waited thirty years to go to Hawaii and went along with the FreedomClub when they went even though he was in a wheel chair. They pushed him all over the islands the entire time giving him an amazing experience. Then, just one day after returning home, the man died. Realizing that they had helped make one of his dreams come true made all the work involved in doing it worthwhile.

## SHARE YOUR STORY.

The Veterans Task Force is working on a collection of stories from our club directors that will be shared at Peer Group and compiled into a "recipe book" of inspirational readings. I have heard you share many stories of funny and inspiring things that have occurred over the years in your clubs. We're asking you to put your story (or stories) in writing and send it in. Include your story in this collection so others can enjoy it, too.

Here are some guidelines to assist you:

- Stories from Bank Club leaders (directors, presidents, assistants, etc.) only
- Stories should be compelling and inspirational
- Stories can be from anytime in your history as a club director
- Stories from any bank club interactions - not just travel
- No more than 1,000 words - no minimum, as short as you like
- Have FUN!

Please also keep in mind:

- Stories must be submitted in word format for easy editing
- All stories will be edited to remain anonymous and to create the best possible story
- Not all stories will be published
- Deadline - the sooner the better and any stories submitted by December 31 will be eligible for submission in the Recipe Book
- By submitting your story, you grant permission to HCI to use, reuse and publish it at its discretion

**Send your story to [tina@heritageclubs.com](mailto:tina@heritageclubs.com).**

Here's one to get you thinking about your story....

Often we have challenges on our trips, and sometimes we do not realize what is going on until later. On a trip to Alaska, I had a 90-year old gentlemen and his quite a bit younger wife with us. This gentlemen, and more times than not, his wife, were a challenge from the beginning. They had traveled with us before, and we knew them well. But this trip was different.

This gentleman needed help at each and every bathroom stop. Our guide and my husband had to help him to the bathroom. And without going into the details, I mean they had to HELP him with his bathroom needs.

One of our stops was in Dawson City in the Yukon Territory. And if you have been there, you know that this city is straight out of the old west - dirt streets and wooden sidewalks.

[Click here to finish the story](#)



Hospitality Tours



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