



**COMMUNITY ASSOCIATION**

**Board of Directors Workshop Meeting**

**Thursday, January 19, 2023, beginning at 2:00 P.M.**

**Meeting platform via Video & Audio Conferencing**

**Homeowners are encouraged to join Zoom Meeting at**

**<https://us02web.zoom.us/j/8445866556>**

**Meeting ID: 844 586 6556**

**Questions can also be submitted in advance at [AskVCA@ranchovistosohoa.com](mailto:AskVCA@ranchovistosohoa.com)**

🔊 Board Workshop Meeting Call to Order at 2:00 P.M. 🔊

- I. Board President Announcements and Remarks – Gayle Lopez**
- II. Roll Call and Adopt Agenda**
- III. Wealth Management Partners Presentations**
  - A. Freestone Capital, Robert Mellon – 2:00 p.m.**
  - B. Morgan Stanley, Patrick Renzi – 2:30 p.m.**
  - C. RBC Wealth Management, Vance Falbaum -3:00 p.m.**
- VI. Next Meeting** - The next General Session is tentatively scheduled for Thursday, January 26, 2023, at 5:30 p.m. via Zoom.
- XI. Adjournment**