

From: [Kristi Birkeland, UWWC](#)
To: [Natalie Boatman, WECU](#); [Jason Sears, Optum](#); [Jason Sears](#); [Natalie Boatman](#)
Cc: [Mike Weinstein, UWWC](#)
Subject: RE: Finance and Executive Committee meetings Oct 16 - Time adjustment
Date: Tuesday, October 14, 2025 8:11:31 AM
Attachments: [image004.png](#)
[image005.png](#)
[image006.png](#)
[image007.png](#)
[image008.png](#)
[image009.png](#)

Thank you, Natalie! See you all at 5:00 Thursday virtually for a 30 minute speed dating Finance/Executive meeting.

Kristi Birkeland (she/her/hers)
President/CEO
United Way of Whatcom County

From: Natalie Boatman <Natalie.Boatman@wecu.com>
Sent: Tuesday, October 14, 2025 7:50 AM
To: Kristi Birkeland, UWWC <Kristi@unitedwaywhatcom.org>; Jason Sears, Optum <jason.sears@optum.com>; Jason Sears <actuizzle@gmail.com>; Natalie Boatman <njoyboatman@gmail.com>
Cc: Mike Weinstein, UWWC <mike@unitedwaywhatcom.org>
Subject: RE: Finance and Executive Committee meetings Oct 16 - Time adjustment

Good morning!

Looking at my work schedule, and the 5pm works no problem (earlier would work too if that's better)

Happy Tuesday and I hope everyone had a wonderful Indigenous People's Day yesterday!

Natalie Boatman [She/Her/Hers](#)
Indirect Dealer Representative



[360-756-7798](tel:360-756-7798)
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From: Kristi Birkeland, UWWC <Kristi@unitedwaywhatcom.org>
Sent: Monday, October 13, 2025 1:10 PM
To: Jason Sears, Optum <jason.sears@optum.com>; Jason Sears <actuizzle@gmail.com>; Natalie Boatman <Natalie.Boatman@wecu.com>; Natalie Boatman <njoyboatman@gmail.com>
Cc: Mike Weinstein, UWWC <mike@unitedwaywhatcom.org>
Subject: RE: Finance and Executive Committee meetings Oct 16 - Time adjustment

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Thank you, Jason! Natalie is off today but let's go with the 5:00 start time and keep it to 30 minutes.

At this point, we do not have financials from Larson Gross to review. Stay tuned for any updates on that front.

Mike~ Will you update our meeting invites to reflect this change?

Thank you all!

Kristi Birkeland (she/her/hers)
President/CEO
United Way of Whatcom County

From: Sears, Jason <jason.sears@optum.com>
Sent: Friday, October 10, 2025 11:48 AM
To: Kristi Birkeland, UWWC <Kristi@unitedwaywhatcom.org>; Jason Sears <actuizzle@gmail.com>; Natalie Boatman, WECU <natalie.boatman@wecu.com>; Natalie Boatman <njoyboatman@gmail.com>
Cc: Mike Weinstein, UWWC <mike@unitedwaywhatcom.org>
Subject: RE: Finance and Executive Committee meetings Oct 16 - Time adjustment

I'm open to either. I'll follow your lead.

~J

Jason Sears, FSA, CERA (he/him)
Senior Director | Optum Advisory Services

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Optum

From: Kristi Birkeland, UWWC <Kristi@unitedwaywhatcom.org>

Sent: Friday, October 10, 2025 10:44 AM

To: Jason Sears <actuizzle@gmail.com>; Sears, Jason <jason.sears@optum.com>; Natalie Boatman, WECU <natalie.boatman@wecu.com>; Natalie Boatman <njoyboatman@gmail.com>

Cc: Mike Weinstein, UWWC <mike@unitedwaywhatcom.org>

Subject: Finance and Executive Committee meetings Oct 16 - Time adjustment

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Hi Natalie and Jason,

There's an Imagination Library event I need to attend in Lynden on the 16th. It starts at 6pm so I'll have to leave the office by 5:30.

I see two viable options to make this work:

1. Adjust our meeting times up 30 minutes. Start Finance at 4:30 and Executive at 5:00.
2. Be super efficient and roll through finance and executive information in one 30 minute session (5:00 – 5:30).

Let me know what your preferred scenario is and we can go from there.

Thank you!

Kristi Birkeland (she/her/hers)

President/CEO

United Way of Whatcom County

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