

A decorative graphic on the right side of the slide, consisting of a grid of squares in various shades of green (dark, medium, and light) and black, arranged in a pattern that resembles a stylized leaf or a geometric mosaic.

Treasurer Huddle

October 8, 2026

Logo

Presentation's Overview

Cents-able Solutions:

 Insurance Renewal

 Collaborative Ideas

 Insurance Guide

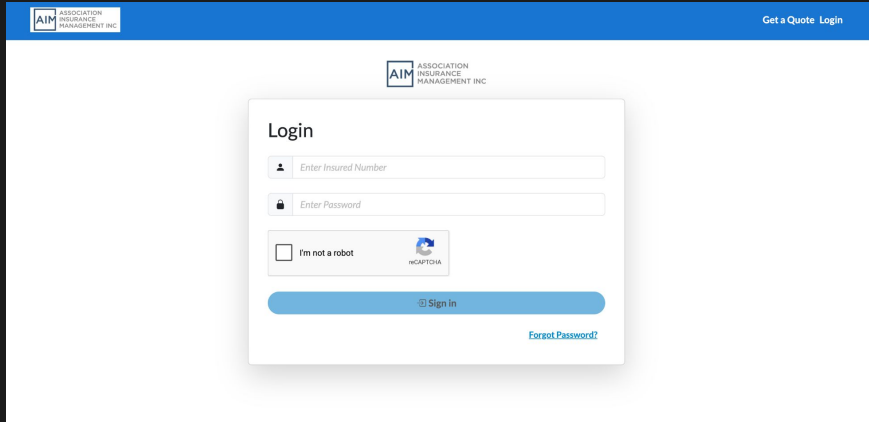
 Hot Seat

 Q & A - Open Discussion

Company Name

Month Year

Logging into the AIM Portal

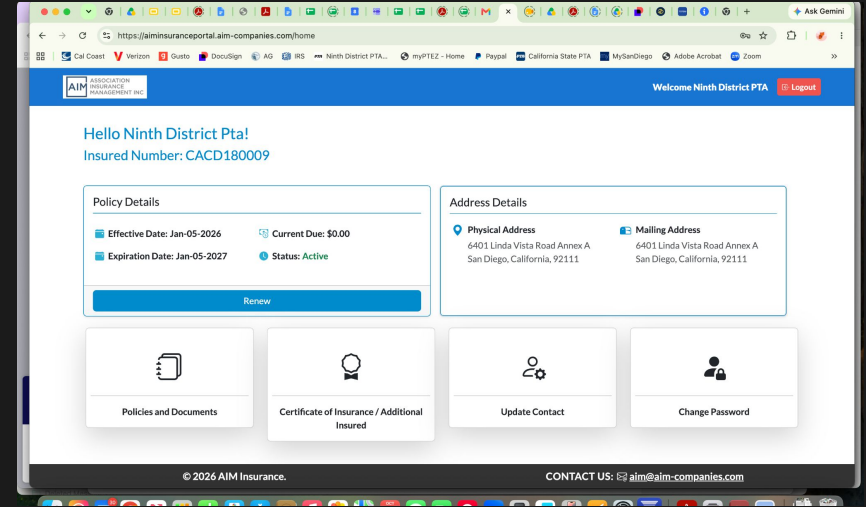


The screenshot shows the login page for the AIM Insurance Management Inc. portal. The page has a blue header with the AIM logo and the text "ASSOCIATION INSURANCE MANAGEMENT INC." and "Get a Quote Login". The main content area is white and features a "Login" form. The form has two input fields: "Enter Insured Number" and "Enter Password". Below these fields is a checkbox labeled "I'm not a robot" with a CAPTCHA icon. A blue "Sign In" button is at the bottom of the form. A link "Forgot Password?" is located at the bottom right of the form.

Enter Insured Number for Login

Password

- Use password from last year if known
- Forgot Password



The screenshot shows the dashboard for a logged-in user, "Ninth District Pta". The page has a blue header with the AIM logo and the text "ASSOCIATION INSURANCE MANAGEMENT INC." and "Welcome Ninth District Pta Logout". The main content area is white and features a "Hello Ninth District Pta!" greeting and the "Insured Number: CACD180009". Below this, there are two sections: "Policy Details" and "Address Details". The "Policy Details" section shows "Effective Date: Jan-05-2026", "Expiration Date: Jan-05-2027", "Current Due: \$0.00", and "Status: Active". A blue "Renew" button is at the bottom of this section. The "Address Details" section shows "Physical Address" and "Mailing Address" both as "6401 Linda Vista Road Annex A, San Diego, California, 92111". Below these sections are four buttons: "Policies and Documents", "Certificate of Insurance / Additional Insured", "Update Contact", and "Change Password". The footer shows "© 2026 AIM Insurance." and "CONTACT US: aim@aim-companies.com".

Current Coverage

- Address Details – Should be school address
- Policies & Documents
- Certificate of Insurance & Additional Insured
- Update Contact
- Change Password

Certificate of Insurance & Additional Insured

Proof of Coverage

Select the term *

Policy - 1/5/2026 - 1/5/2027

Please select one of the following options: *

- ☐ General Proof of Coverage
- ☒ Proof of coverage with Additional Insured/Waiver of Subrogation
- ☐ Proof of Coverage with Certificate Holder
- ☐ Certificate Holder and Additional Insured
- ☐ Waiver of Subrogation (WOS)

Additional Insured Information

Certificate Holder Name *

Address *

City * State * Zip *

Proof of Coverage with Additional Insured Waiver

Request Additional Insured Certificate (District)

- Complete the Certificate Holder Name
- Address
- City, State and Zip

Form will be emailed in about 2 business days

Proof of Coverage

Select the term *

Policy - 1/5/2026 - 1/5/2027

Please select one of the following options: *

- ☐ General Proof of Coverage
- ☐ Proof of coverage with Additional Insured/Waiver of Subrogation
- ☒ Proof of Coverage with Certificate Holder

Certificate Holder Information

Certificate Holder Name *

Address *

City * State * Zip *

Download Certificate of Insurance

Proof of Coverage

Request Proof of Coverage (District)

- Complete the Certificate Holder Name
- Address
- City, State and Zip

Form will be emailed in about 2 business days

Renewal & Coverage

The screenshot shows the AIM Association Insurance Management Inc. website. The header includes the AIM logo and navigation links. The main content area displays the 'Total Cost for your Policy' as \$423.00 (ANNUAL COST) with an 'Effective Date' of 01-05-2027. A 'Please note' box states that the state has a common anniversary date of 1/5/2028, and the cost will be adjusted accordingly. Below this, the 'Your coverages' section is partially visible, showing 'General Liability' as a mandatory coverage.

AIM ASSOCIATION INSURANCE MANAGEMENT INC. Welcome Ninth District PTA Logout

Total Cost for your Policy **\$423.00** **Effective Date ***

Additional details need to be filled out to complete the quote ANNUAL COST 01-05-2027

Please note:

Your state has a common anniversary date which means coverage will end on a set date. The cost reflected above will be adjusted accordingly. If you wish for coverage to be effective for a date other than tomorrow's date please adjust it in the above "Effective Date" field.

Common Anniversary Date: 1/5/2028

Should you have any questions, please call AIM at (800) 876-4044

Your coverages

Coverages marked with a "*" are mandatory for your group.

General Liability

General Liability *

The screenshot shows the 'Your coverages' section of the website. It details the 'General Liability' coverage, which includes a \$1,000,000 Occurrence limit. The coverage includes Aggregate, Products/Completed Operations, and Personal & Advertising Injury. The 'Damage to Rented Premises' coverage is also shown, with a \$500,000 limit for damage to premises.

Your coverages

Coverages marked with a "*" are mandatory for your group.

General Liability

General Liability *

General Liability Premium - This coverage provides protection against claims of bodily injury, property damage, and personal injury that occur on your premises or as a result of your business operations.

\$1,000,000 Occurrence includes:

	Limit/Cost
Aggregate	\$2,000,000
Products/Completed Operations	\$2,000,000
Personal & Advertising Injury	\$1,000,000

Limit/Cost \$1,000,000 - For \$85

Damage to Rented Premises *

General Liability includes \$500,000 for damage to premises, including fire, rented by you or temporarily occupied by you. This includes premises where you may hold events. We offer an optional upgrade to \$500,000 should your group require it.

Limit/Cost \$1,000,000 - For \$0

Cost of Policy & Effective Date

- Standard Unit Insurance = \$345
- Standard Council Insurance = \$238
 - Add-ons will increase premium
- All policies take effect 1/5/2027

General Liability & Damages to Rented Premises

This coverage is required

- Covers bodily injury, property damage, & personal injury during PTA organized events
- Covers damage to rented premises or facilities used during PTA organized events

Coverages

☒ Extended Medical *	
General Liability coverage has a separate component that gives insureds access to a standard \$5,000 in Medical Payments per person. You may wish to upgrade the standard limit based on your groups activities.	Limit/Cost \$20,000 - For \$0
☒ Media Liability	
Media Liability is designed to protect you from liability in the event you accidentally misuse or disclose information on your website or other social media site. This includes misuse of logo, copyright, pictures, confidential information and other misrepresentations or misappropriations.	Limit/Cost \$25,000 - For \$70
☒ Hired & Non-owned Auto (HNOA) *	
Liability in connection with autos hired, such as charter buses or rented vans, and personal autos (not company owned) owned and driven by employees or volunteers in the scope of your business.	Limit/Cost \$1,000,000 - For \$0

Extended Medical - Required

- \$5,000 in medical payments per person
- Coverage can be increased with additional cost

Hired & Non-owned Auto - Required

- Rented vehicles that are driven by volunteers

Media Liability - Optional

- Coverage for social media - may consider if your unit used social media a lot

☒ Abuse & Molestation *	
Liability in connection with "abusive conduct."	Limit/Cost \$1,000,000 - For \$0
Fidelity Bond (Crime)	
☒ Crime *	
Bond coverage protects your money. It covers anyone who your organization trusts with the money whether it's a President, Treasurer, board member, volunteer, or courier. If that person embezzles (runs off) with your money, Bond coverage would replace those missing funds.	Limit/Cost \$25,000 - For \$48

Abuse & Molestation - Required

- Specialized liability insurance policy or endorsement designed to protect organizations (not the perpetrator) from liability claims alleging sexual abuse, physical abuse, or severe misconduct by their employees, volunteers, or representatives.

Fidelity Bond (Crime) - Required

- Only covers up to \$25,000
- If unit regularly has more funds than \$25,000 unit should increase coverage.
- \$50,000 is \$140 and then increases by \$60 per \$50,000 up to \$500,000 coverage

Coverage

Professional Liability (Directors and Officers)

☒ Directors & Officers Liability *

Officers Liability coverage protects the organization from lawsuits for "wrongful acts". If someone sued the officers of your organization for mismanagement, misrepresentations, dissemination of false or misleading information, or inappropriate actions this coverage would pay to defend you against those actions.

Limit/Cost
\$1,000,000 - For \$47

CA Workers Compensation

☒ CA Workers Compensation *

Workers Compensation coverage for individuals paid directly by PTA for services performed. If such individuals do not have their own WC, they could be deemed an "employee" of PTA and owed WC benefits. Included as a standard part of the CA PTA package.

Limit/Cost
\$1,000,000 - For \$7

CA General Liability Umbrella (excess)

☒ CA General Liability Umbrella (excess) *

Additional layer of general liability limit included in the CA PTA package.

Limit/Cost
\$3,000,000 - For \$22

Professional Liability (Directors & Officers)

Directors & Officers Liability – Required

- Protects board officers in case of a lawsuits regarding mismanagement, misinformation, & inappropriate actions

Workers' Compensation – Required

- Must report anyone paid for services who does not have their own WC insurance – covers up to \$1,000
- Extra cost if over \$1,000 when report is filed in January

CA Excess Sexual Molestation

☒ CA Excess Sexual Molestation *

Additional layer of abuse & sexual molestation limit included in the CA PTA package.

Limit/Cost
\$2,000,000 - For \$16

CA Umbrella Directors and Officers (excess)

☒ CA Umbrella Directors and Officers (excess) *

Additional layer of Directors and Officers liability limit included in the CA PTA package.

Limit/Cost
\$1,000,000 - For \$5

CA Employment Practices Liability

☒ CA Employment Practices Liability *

Protection for your PTA against claims made by employees, or volunteers of the PTA, for a violation of their legal rights in connection with "employment" by PTA. Included as a standard part of the CA PTA package.

Limit/Cost
\$1,000,000 - For \$8

Download Quote

Buy now

California Excess Coverage

CA General Liability Umbrella – Required

An umbrella policy sits on top of your underlying policies. If a lawsuit or claim exceeds your base \$1M limit, the umbrella covers the remaining costs up to the umbrella limit

CA Excess Sexual Molestation

CA Umbrella Directors and Officers

CA Employment Practices Liability

Verify Contact Information and Address

Association Insurance Management Inc. | Welcome Ninth District PTA | Login

Current primary contact details

First Name * Deborah

Last Name * Childers

Mobile/Phone * 8582688077

Note
Updates to contact name, phone number or email address can be made by clicking the person icon at the top right of this screen.

Back Next

President or Treasurer

Be sure to update information to current officer

Association Insurance Management Inc. | Welcome Ninth District PTA | Login

Please enter your address details

Physical Address

Address line 1* 6401 Linda Vista Road, Annex A

Address line 2

City San Diego

State

Phone 8582688077

Zip 92111

Fax

Mailing Address same as the Physical Address? * Yes No

Note
P.O. Box is not allowed for any physical address. If you would like to use a P.O. Box, please enter it as the mailing address.

Back Next

© 2026 AIM Insurance. CONTACT US: PTAaim@aim-companies.com

School Address

Be sure to have the school address, not an officer address

Financial Reviews- Monthly & Yearly

AIM MANAGEMENT INC. Welcome Ninth District PTA Logout

Acknowledgement

☐ I certify that there have been no losses, accidents or circumstances that might give rise to a claim, that have not already been reported for a coverage(s) for which I am applying.*

☐ I acknowledge that AIM may contact me or my organization by email.*

☐ I agree to the terms and conditions of the policy as set forth in this application.*

Requirements of bond coverage (make sure all officers are aware of requirements):

1. The Organization must conduct an annual review of the books by a Review Committee or qualified accountant.
2. The monthly bank statement must be initialed and reviewed by someone who does not have authorization to sign checks.

COVERAGE IS VOID IF THESE REQUIREMENTS ARE NOT FOLLOWED

Any person who knowingly and with intent to defraud any insurance company or another person Files an application for insurance or statement of claim containing any materially false information, or conceals for the purpose of misleading information concerning any fact Material thereto, commits a fraudulent insurance act, which is a crime and subjects the Person to criminal and civil penalties

[Back](#) [Next](#)

[Edit Coverages](#)

Acknowledgement -Failure to do the following negates the fraud/theft coverage.

- Bank statements and reconciliations must be signed and dated by a non-check signer each month.
- Signature indicates the statement correlates to the treasurer's report.
- Must complete a yearly financial review. Ninth District PTA strongly recommends biannual

Insurance Quote

Applicant Information

Insured Name
Ninth District PTA

Address
6401 Linda Vista Road Annex A,
San Diego CA, 92111

Treasurer
treasurer@ninthdistrictpta.org
760-804-7350

\$421.00 Per Year

Proposed Effective From:
Jan-05-2027 - Jan-05-2028
Insurance is underwritten by AIM

Coverages	Limits	Total
1. General Liability		
1.1 General Liability	\$1,000,000	\$85.00
Aggregate	\$2,000,000	
Products/Completed Operations	\$1,000,000	
Personal & Advertising Injury	\$1,000,000	
1.2 Media Liability	\$25,000	\$68.00
2. Fidelity Bond (Crime)		
2.1 Crime	\$25,000	\$48.00
3. Inland Marine (Business Personal Property)		
3.1 Inland Marine	\$10,000	\$115.00

Insurance Quote

- Recap of coverage and associated premium cost for each category of coverage
- Verify the coverage is accurate.
- Be sure to be aware of changes you made which will increase the premium cost
- If increasing coverage should have executive board discuss before paying.

Payment – Recommended EFT Payment Option

AIM ASSOCIATION
INSURANCE
MANAGEMENT INC.

Welcome Ninth District PTA Logout

How do you want to pay?

Total Policy Cost

\$421.00
Per Year

☒ Credit Card ☐ EFT ☐ I will mail a check

For questions or concerns

📍 Mailing Address
PO BOX 3427, Houston, TX 77253-3427

✉ aim@aim-companies.com

☎ (800)876-4044

Confirm Payment

AIM ASSOCIATION
INSURANCE
MANAGEMENT INC.

Welcome Ninth District PTA Logout

How do you want to pay?

Total Policy Cost

\$421.00
Per Year

☒ Credit Card ☐ EFT ☐ I will mail a check

For questions or concerns

📍 Mailing Address
PO BOX 3427, Houston, TX 77253-3427

✉ aim@aim-companies.com

☎ (800)876-4044

Confirm Payment

Are you sure?

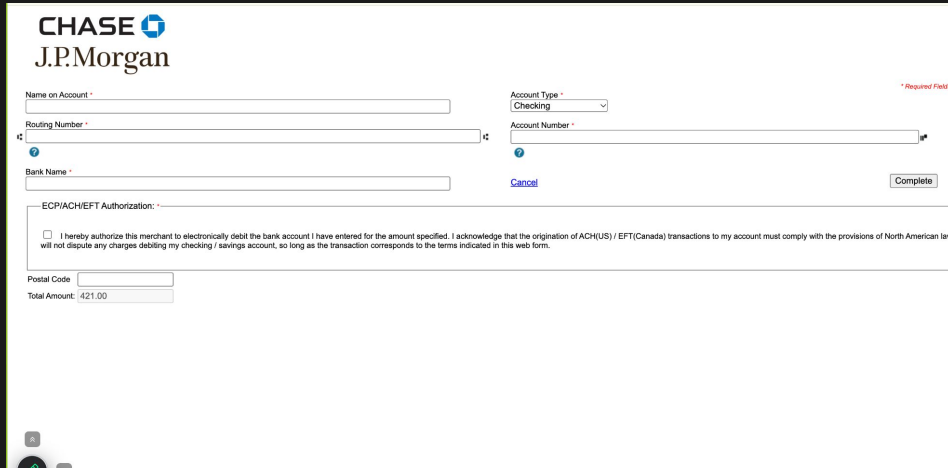
You will be directed to a secure gateway for payment. Upon completion of payment, you will receive an email with details of your purchase. If you need to select a different payment method after below confirmation, you will be directed to login again.

OK CANCEL

Payment Process

- Complete an [Authorization for Payment via EFT](#) form
- Select EFT payment method

Payment via EFT



The image shows a Chase J.P. Morgan EFT payment form. It includes fields for Name on Account, Account Type (dropdown), Routing Number, Account Number, and Bank Name. There is a "Complete" button and a "Cancel" link. Below the form is an EFT authorization section with a checkbox and a disclaimer. At the bottom, there are fields for Postal Code and Total Amount (\$421.00).

CHASE J.P. Morgan

Name on Account *

Account Type *
Checking

Routing Number *

Account Number *

Bank Name *

Cancel Complete

EFT/ACH/EFT Authorization: *

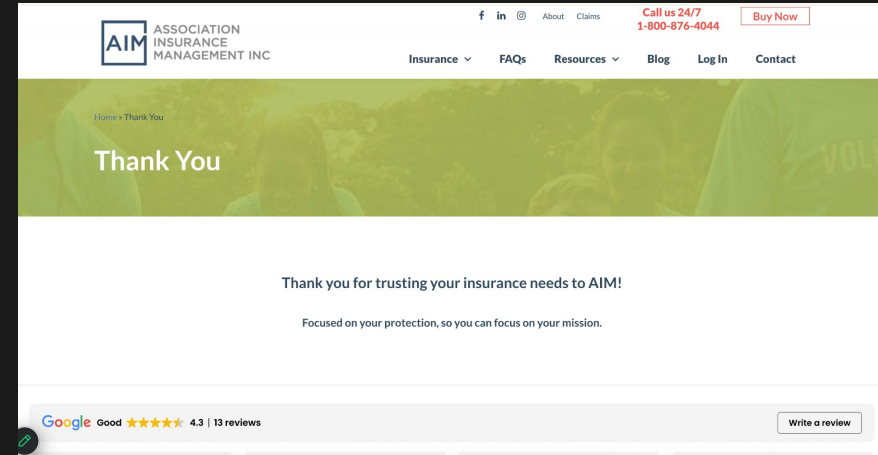
☐ I hereby authorize this merchant to electronically debit the bank account I have entered for the amount specified. I acknowledge that the origination of ACH(US) / EFT(Canada) transactions to my account must comply with the provisions of North American law. I will not dispute any charges debiting my checking / savings account, so long as the transaction corresponds to the terms indicated in this web form.

Postal Code

Total Amount: \$421.00

EFT Payment Page

- Name on Account
- Account Type
- Routing Number
- Account Number
- Bank Name
- Authorized Payment
- Zip Code
- Verify Amount



The image shows a "Thank You" page from AIM Insurance Management Inc. The page has a green header with the company logo and navigation links. The main content area has a green background with the text "Thank You" and "Thank you for trusting your insurance needs to AIM!". Below this is a quote: "Focused on your protection, so you can focus on your mission." At the bottom, there is a Google review section showing a 4.3 rating from 13 reviews and a "Write a review" button.

AIM ASSOCIATION INSURANCE MANAGEMENT INC

Insurance ▾ FAQs Resources ▾ Blog Log In Contact

Call us 24/7 1-800-876-4044 Buy Now

Home » Thank You

Thank You

Thank you for trusting your insurance needs to AIM!

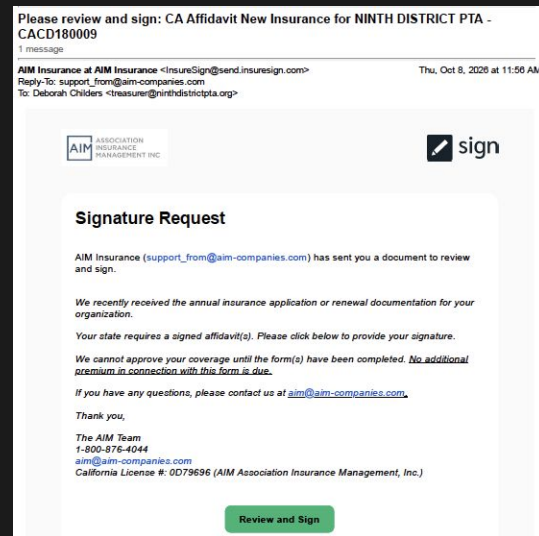
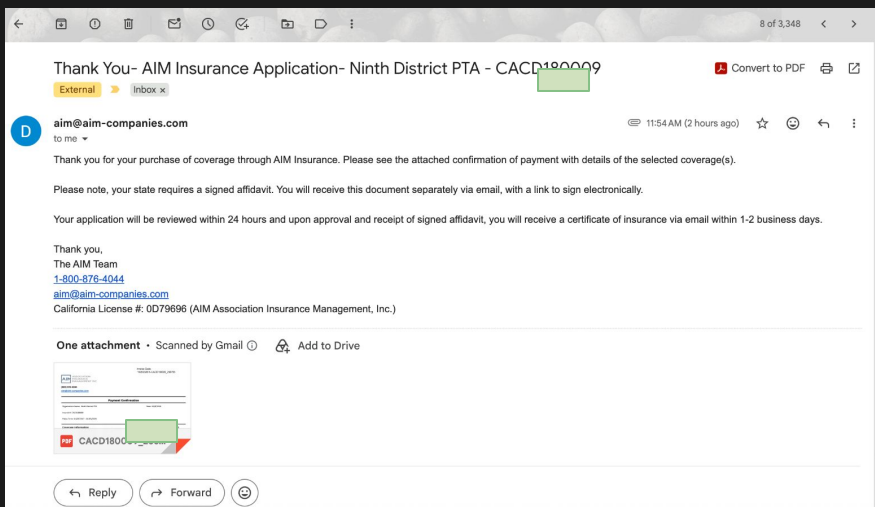
Focused on your protection, so you can focus on your mission.

Google Good ★★★★★ 4.3 | 13 reviews Write a review

Payment Verification

A screen pops up between these two to verify the payment but it is fast so did not get a screenshot before it disappeared.

Follow-up Emails



Payment Receipt

- This email includes the receipt for payment
- Download and attach to the Authorization for Payment via ACH form

CA Affidavit

- This email has the link to sign the Affidavit
- This is **required to be signed to complete the insurance process**
- President or Treasurer can sign

CA Affidavit

sign CA Affidavit New Insurance for NINTH DISTRICT PTA - CACD180009

Signing as: Deborah Childers

Start

You need to [sign in 1 field](#).

IMPORTANT NOTICE:

1. The insurance policy that you are applying to purchase is being issued by an insurer that is not licensed by the State of California. These companies are called "nonadmitted" or "surplus line" insurers.
2. The insurer is not subject to the financial solvency regulation and enforcement that apply to California licensed insurers.
3. The insurer does not participate in any of the insurance guarantee funds created by California law. Therefore, these funds will not pay your claims or protect your assets if the insurer becomes insolvent and is unable to make payments as promised.

[Decline document](#)

sign CA Affidavit New Insurance for NINTH DISTRICT PTA - CACD180009

Signing as: Deborah Childers

Submit document

for this insurance will be returned to you.

Consent to do business

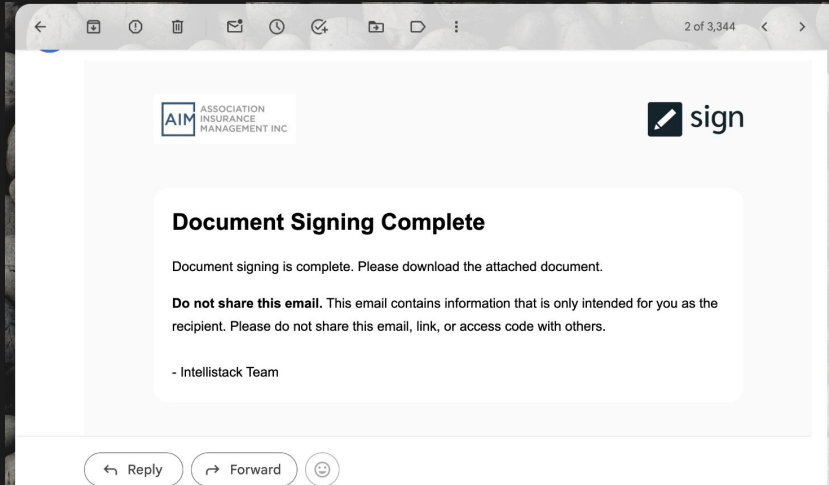
I agree to do business electronically with all parties to this document and with Formstack Sign and agree that I have reviewed the [consumer disclosures](#) related to electronic signatures.

[Cancel](#) **Submit document**

DocuSign

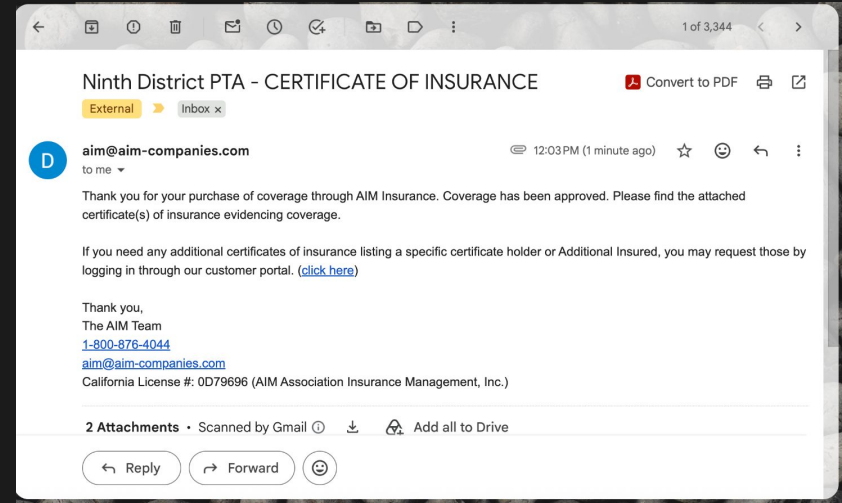
- Click the "Start" button at the top of the screen
- Consent to sign via DocuSign
- Read the form
- Sign the form

Confirmation Emails



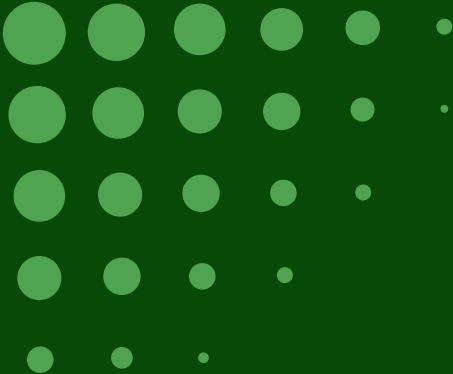
Affidavit Confirmation

- Download or print the attached Affidavit
- Store with insurance records
- Upload to FutureFund Connect –
 - 2026-2027 Certificate of Insurance – Affidavit



Certificate of Insurance & Payment Confirmation

- Download or print the Certificate of Insurance
- Upload Certificate of Insurance to FutureFund Connect
- 2026-2027 Certificate of Insurance
 - 2026-2027 Insurance Payment



2027 Insurance Guide

Before planning or hosting an event

- Review the [insurance guide](#) as it is updated each year
- Consult the Red Light, Yellow Light, Green Light p. 7

Significant Changes for 2027

- No Bounce Houses/Inflatables
 - 3 Person Financial Review Committees
- 

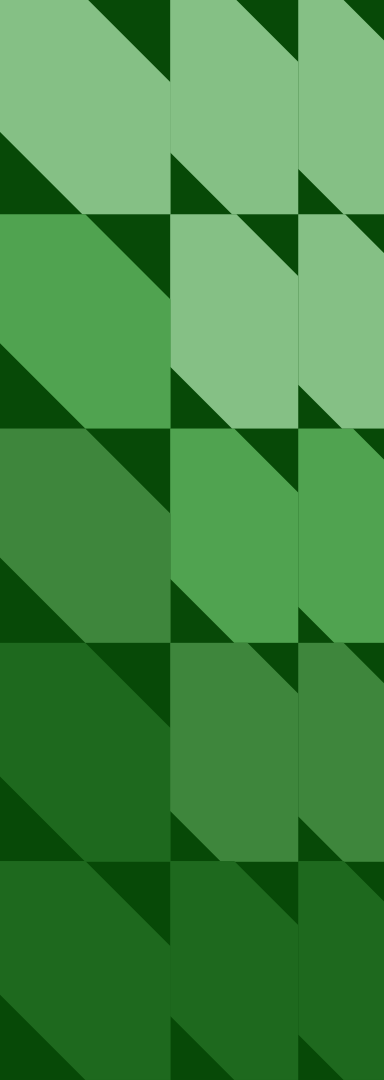
Resources

Insurance Guide

[Vendor Requirements](#)

[CAPTA Insurance](#)

[AIM Website](#)



Q & A – Financial Fires & Road Blocks

Thank you for attending

Thank you for attending the Treasurer 's Huddle!

The next Treasurer's Huddle is scheduled for

- October 26th - Fundraising - Donation Dos and Don'ts
- November 12th at 6:00 PM - Workers' Compensation

We will post all Huddles on the Ninth District PTA website in case you miss one.