

**FPA NCA
PRESIDENT**

*Monthly Time Commitment: 15-20 hours per month
Member of the Executive Committee*

DUTIES:

1. Preside over Board meetings and Preside over Chapter meetings
2. Oversee the work of the board of committees and President-Elect with an emphasis on assigned committees as divided between President and President-Elect
3. Work with chapter executive director to assure smooth chapter operations including writing newsletter articles and chapter award recognition.
4. Work with chapter executive director and treasurer to prepare budget/dues proposal for the fiscal year
5. Provide overall leadership to enable the chapter to meet its mission and goals
6. Appoint Award Nominating Committee Chair in January
7. Chair the Nominating Committee, per By-Laws
8. Sign a chapter governance acknowledgement form for FPA National by March 31
9. Confirm with Executive Director that the VA State Corporation Commission Report is filed by June 30 of each year with the \$25 filing fee.
10. Support the efforts of the other board members; attend programs and activities of our chapter.
11. Train the President-Elect to insure a smooth transition
12. Develop leaders for the organization
13. Assist the President-Elect in planning the annual strategic planning retreat, including debriefing and evaluating of the current year
14. Develop and maintain relationships with allied professionals
15. Participate in monthly meeting between President, President-Elect, and Executive Director

16. To continue the education of a team leadership system to new board member and committee members (fostering trust, creating vision, developing strategies, energizing alliances, activating transformations, and measuring progress – achieving results, and resetting the vision – as well as developing future leaders)

**FPA NCA
PRESIDENT-ELECT**

*Monthly Time Commitment: 10 hours per month
Member of the Executive Committee*

DUTIES:

1. To perform the duties of president in his/her absence
2. To attend board meetings; support the efforts of other board members; attend the programs and activities of our local chapter
3. For review by Executive Committee, organize and prepare the structure and a proposed agenda for the annual strategic planning retreat for current and new board members
4. Attend the Leadership Conference
5. Participate in monthly meeting between President, President-Elect, and Executive Director
6. Responsible for the Chapter Recognition Program Submission
7. Responsible for the continued education of a team leadership system to new board members and committee members (fostering trust, creating vision, developing strategies, energizing alliances, activating transformation, and measuring progress – achieving results, and resetting the vision – as well as developing future leaders)

**FPA NCA
CHAIRPERSON/PAST PRESIDENT**

*Monthly Time Commitment: 5 hours per month
Member of the Executive Committee*

DUTIES:

1. Serve as a resource for the current president and board on matters and assist as needed
2. Support the efforts of other board members
3. Attend chapter programs and activities
4. Focus on an area that would lend ongoing and continued interest to further mission and vision of the chapter
5. Responsible as Symposium Chair for the Annual January Educational Symposium
6. Create, Coordinate and run an effective January Symposium Committee and report results to the BOD
7. Send confirmation letter to speakers outlining approved speaker fee and approved speaker expenses and confirmation of speaking date, as well as required submission of Bio and Outline 60 days prior to speaking engagement for January Symposium
8. Continue the education of the team leadership system to new board members and committee members (Six step system: fostering trust, creating vision, developing strategies, energizing alliances, activating transformations, and measuring progress – achieving results, and resetting the vision – as well as developing future leaders)

**FPA NCA
TREASURER**

*Monthly Time Commitment: 5 hours per month
Member of the Executive Committee*

DUTIES:

1. To work with the Executive Director to maintain the chapter's financial records; review financial records and bank statements
2. To work with the Executive Committee to prepare a budget for the fiscal year, including coordination with Board members and their budget requirements for the coming year
3. Monthly review of budget and profit & loss statement and asset statement; create and prepare monthly summary for Board review.
4. Rotate with three other Board members to arrive early to monthly programs to set up and test AV equipment for speakers
5. Serve on the Gala Committee as a liaison between the Gala Committee and the BOD to keep the BOD informed of the progress and coordination of the Gala event
6. In coordination with Executive Director and chapter accountant, to complete and submit federal and state annual tax reports (1099s due date January 31st; Form 990 due May 15th)
7. To confirm the Chapter has completed and submitted its Annual Registration and VA Nonprofit Corporation to Secretary no later than June 10th; submit a copy to Executive Director for filing.
8. Support the efforts of other board members; attend board and chapter programs and activities

**FPA NCA
SECRETARY**

*Monthly Time Commitment: 5 hours per month
Member of the Executive Committee*

DUTIES:

1. Chair the Financial Fitness Expo
2. Create, Coordinate and run an effective Financial Fitness Committee and report results to the BOD
3. Evaluate speakers at events by utilizing member surveys and providing feedback to the Programs Director and the BOD
4. To work with the Executive Director to maintain and review the minutes for board meetings.
5. To insure the Chapter records are kept in order and maintained in a secure location.
6. Insure that the Officers and Directors Report are filed with the State Corporation Commission in June of each year to maintain the chapter's incorporation
7. To confirm the Chapter has completed and submitted its Annual Registration and VA Nonprofit Corporation to Secretary no later than June 10th; submit a copy to Executive Director for filing.
8. Support the efforts of other board members; attend board and chapter programs and activities

**FPA NCA
PROFESSIONAL DEVELOPMENT DIRECTOR**

*Monthly Time Commitment: 10 hours per month plus Committee meetings
Reports to President-Elect*

DUTIES:

1. Manage and develop speakers for the Professional Development Program
2. Create and administer professional development programs and relationships with faculty and student groups of local colleges/universities offering CFP certification programs for financial planning degree programs; serve as our chapter College and University liaison.
3. Create, Coordinate and run an effective Professional Development Committee and report results to the BOD
4. Serve as resource for career development by acting as point person for questions and collaborative efforts
5. Communicate with chapter members to promote career development programs and while ultimately advancing the financial planning profession
6. Attend monthly board meetings, chapter meetings, and chapter activities
7. Work with the Membership Committee to establish and maintain student chapters at institutions of higher learning in the area and promote the financial planning as a professional to interested college students
8. Work with the Membership Committee to encourage student members to become involved in chapter programs to enhance networking relations with chapter members to interact with students by speaking at their finance clubs
9. Develop programs for involvement of members with student chapters including mentorship and internship programs developed by the Professional Development Committee
10. To submit periodic articles for the newsletter about both student and regular membership

FPA NCA MEMBERSHIP DIRECTOR

*Monthly Time Commitment: 10 hours/month plus committee meetings
Reports to Secretary*

DUTIES:

1. Create, Coordinate and run an effective Membership Committee and report results to the BOD. Members may include: membership retention, member benefits, new member support, etc.
2. Set up membership development plan to increase FPA NCA membership. Plan should include the following:
 - Membership Drive (examples: member get a member program, phone follow up with members who have not renewed, membership promotion to non-member, invitations to membership programs and receptions)
3. Member Retention
 - a. Coordinate a calling system designed to welcome new members and invite them to FPA functions and participate on committees
 - b. Organize and facilitate New Member Receptions
 - c. Encouraging all new members within the past year to attend. Encourage new member participation within the organization. Emphasize member retention with this and other activities.
4. Develop, coordinate, and promote FPA membership within the organization to build the organization. Work with other Chapter committees to coordinate action and support their initiatives.
5. Support Allied Professional Outreach. Create and foster alliances and strategic partnerships with allied professional organizations for joint meetings and symposiums, reciprocal publication of meeting information in newsletters/web sites, etc.
6. Attend board meetings, support the efforts of other board members, and attend chapter meetings and activities.
7. Develop relationships with area colleges and universities and promote student membership.
8. Serve as FPA NCA Volunteer Coordinator who is responsible for placing interested members on committees

**FPA NCA
PROGRAMS DIRECTOR**

***Monthly Time Commitment: 10 hours pre month plus committee meetings
Reports to Secretary***

DUTIES:

1. Create, Coordinate and run an effective Programs Committee and report results to the BOD. One member of the committee shall be responsible for program facilities
2. Provide speakers for all FPA NCA functions including:
 - Monthly Luncheon Programs – variable number, but typically February, June, July, September, October, and December. January/May are symposium months, March/November are Professional Development months, April is peak tax season and August is a travel month.
 - Assist in January Symposium Speaker selection
 - Develop Spring Symposium Program
 - Coordinate keynote speaker
 - Coordinate sponsors' presenters
 - Coordinate with Peggy to set a schedule to accommodate tracks, ethics, lunch, and keynote
3. Draw speakers from recognized financial speakers, FPA Sponsors, FPA members, Alliance Forum members, National FPA
4. Attend monthly board meetings, chapter activities
5. Ensure Bios and Outlines are submitted to Executive Director 60 days prior to program date to ensure proper approval of credits.
6. Coordinate with speakers on approval of speaker fees and speaker approved expenses
7. Send confirmation letter to speakers outlining approved speaker fee and approved speaker expenses and confirmation of speaking date, as well as required submission of Bio and Outline 60 days prior to speaking engagement
8. Rotate with three other Board members to arrive early to monthly programs to set up and test AV equipment for speakers

**FPA NCA
PUBLIC RELATIONS AND AWARENESS DIRECTOR**

*Monthly Time Commitment: 10 hours/month plus committee meetings
Reports to the President*

DUTIES:

1. Create, coordinate and run an effective Public Relations Committee and report results to the BOD.
2. Promote the Value of Financial Planning including outreach to nonmembers and public relations/awareness activities, such as:
 - a. submitting public service announcements to local media, ,
 - b. informing the pro-bono committee of volunteer opportunities for chapter members
 - c. submitting the dates/topics/location of chapter events in the local newspaper business calendars, as our budget permits, etc.
 - d. Create a public area on our website where the public can submit “ask a planner questions” for the media committee to answer. Selected questions and answers can be posted periodically on our website.
3. Plan and direct public relations activities designed to create and maintain a favorable public image of the Financial Planning profession. Develop a strategy for increasing public awareness of financial planning in general and the FPA specifically. Activities may include:
 - a. participation in a public event,
 - b. submitting *Planning Perspectives* articles to local media on behalf of FPA-NCA,
 - c. coordination with the efforts of the pro bono and the Government Relations committees.
4. Encourage and develop positive media exposure for FPA and the chapter by:
 - a. Developing and presenting a Media Workshop early in the year to train chapter volunteers to work effectively with media outlets looking for expert sources.
 - b. Create a media resource kit to include information about our chapter and FPA national, as well as media bios for board members, those members who attend the media workshop and selected others with recognized expertise.
 - c. Create a “Press Room” area on our website for media looking for information/contacts within our chapter.
 - d. Distribute media requests for interviews to members of the PR/media committee,
 - e. Distribute public speaking opportunities to members of the PR/media committee and the board

5. Promote National Financial Planning Week. Activities may include mayoral or gubernatorial proclamations, hotlines/online chats, press breakfast/luncheon, placed public service announcements (radio/TV, Chapter member speaking opportunities, etc.).
6. The public will include: FPA members, general public, and allied professionals
7. To write articles for the newsletter when appropriate to publicize the speakers' bureau and other PA activities.
8. Attend monthly board meetings, chapter meetings, and chapter activities
9. In the event that we hire a PR firm, coordinate and work closely with the chapter PR retained firm in assigning projects for the firm, ensuring the firm plans activities in accord with the chapters intention and desired direction, and ensuring that the PR firm costs and expenses are held to a minimum

**FPA NCA
COMMUNICATIONS DIRECTOR**

*Monthly Time Commitment: 5 hours/month plus committee meetings
Reports to the Treasurer*

DUTIES:

1. Develop, improve and manage the Chapter Website, including help with updates, revisions and new items for the web site
2. Keep abreast of the latest technology improvements in the industry and provide this information to the BOD and our members.
3. Edit the monthly newsletter and review articles for appropriateness to the Chapter
4. Create, design and manage the membership directory
5. Insure highest quality communications are made through the Chapter Website
6. Create, Coordinate and run an effective Communications Committee and report results to the BOD
7. To support the efforts of the board members and other committees for the purpose of efficiently and effectively realizing their visions
8. Write articles for the newsletter
9. Attend monthly board meetings, chapter meetings, and chapter activities

**FPA NCA
PRO BONO DIRECTOR**

*Monthly Time Commitment: 5 hours/month plus committee meetings
Reports to the Secretary*

DUTIES:

1. Develop the Pro Bono Committee for various Pro Bono opportunities throughout our chapter area
2. Coordinate with FPA National on Pro Bono initiatives impacting our chapter
3. Provide opportunities for Pro Bono training using FPA National pro bono materials
4. To support the efforts of the board members and other committees for the purpose of efficiently and effectively realizing their visions
5. Attend monthly board meetings, chapter meetings, and chapter activities

**FPA NCA
STRATEGIC PARTNERSHIPS CO-DIRECTORS**

*Monthly Time Commitment: 10 hours/month plus committee meetings
Reports to the Treasurer*

DUTIES:

1. Create, Coordinate and run an effective Committee and report results to the BOD.
2. Develop Chapter Sponsor Brochure
3. Solicit Sponsors in order to meet Chapter budget requirements
4. Insure FPA sponsors are pleased with representation at events
5. Assign featured sponsor slots at monthly programs for each sponsor to ensure that all sponsors receive a turn to speak at a member meeting
6. Assign Sponsor Table Booths at Symposium events
7. Work with the Program Director to qualify speakers from sponsoring firms.
8. To support the efforts of the board members and other committees for the purpose of efficiently and effectively realizing their visions
9. Attend monthly board meetings, chapter meetings, and chapter activities

**FPA NCA
GOVERNEMENT RELATIONS DIRECTOR**

*Monthly Time Commitment: 10 hours/month plus committee meetings
Reports to the Treasurer*

DUTIES:

1. Work with FPA Washington DC office
2. Coordinate, select representatives and run Financial Planning Day on Capital Hill in conjunction with the Capital Hill requirements
3. Coordinate, select representatives and run Financial Planning Day on Capital Hill in Annapolis and in Richmond in conjunction with fellow MD and VA chapters
4. Create, Coordinate and run an effective Committee and report results to the BOD.
5. Inform Chapter of changes in regulatory proposals and requirements in MD, VA, DC as well as with the SEC
6. Provide chapter with National FPA updated information on regulatory issues so that this information may be posted to our web site
7. Attend Government Relations monthly conference calls to stay on top of new government developments
8. Rotate with three other Board members to arrive early to monthly programs to set up and test AV equipment for speakers
9. Support the efforts of the board members and other committees for the purpose of efficiently and effectively realizing their visions
10. Write articles for the newsletter
11. Attend monthly board meetings, chapter meetings, and chapter activities

**FPA NCA
MENTORING PROGRAM DIRECTOR**

*Monthly Time Commitment: 10 hours/month plus committee meetings
Reports to the President-Elect*

DUTIES:

1. Develop and manage the Mentoring Program
2. Create, Coordinate and run an effective Committee and report results to the BOD
3. Match Mentoring volunteers with those who request Mentors
4. Support the efforts of the board members and other committees for the purpose of efficiently and effectively realizing their visions
5. Write articles for the newsletter when appropriate to publicize activities
6. Attend monthly board meetings, chapter meetings, and chapter activities
7. Coordinate social networking opportunities with National FPA on their social networking and Web 2.0 activities

**FPA NCA
FACILITIES AND SOCIAL EVENTS DIRECTOR**

*Monthly Time Commitment: 10 hours/month plus committee meetings
Reports to the Treasurer*

DUTIES:

1. Chair the Annual Charity Golf event; develop the Golf committee and delegate responsibilities for a successful event
2. Help to locate possible meeting sites for chapter monthly programs
3. Coordinate with Executive Director and facility for the successful implementation of the monthly programs
4. Coordinate social event activities for the chapter; develop the social committee and delegate responsibilities for a successful event
5. Rotate with three other Board members to arrive early to monthly programs to set up and test AV equipment for speakers
6. Support the efforts of the board members and other committees for the purpose of efficiently and effectively realizing their visions
7. Write articles for the newsletter
8. Attend monthly board meetings, chapter meetings, and chapter activities