

### **Officer: President**

Beginning of New Fiscal Year:

1. Set date and agenda for planning retreat
2. Ensure BOD members are clear on their duties and responsibilities
3. Ensure CFA Institute and PCR have new BOD contact information

Ongoing Duties:

1. Maintain vision for Society, and ensure adherence to annual plan.
2. Preside over the Board meetings, events, and any special meetings that are called. Prepare agenda and ensure a quorum will attend.
3. Interface with CFA Institute as necessary
4. Attend Society Leadership meetings as possible

### **Officer: Vice President**

Beginning of New Fiscal Year:

1. Assists President to set date and agenda for planning retreat
2. Assists President to ensure BOD members are clear on their duties and responsibilities
3. Assists President to ensure CFA Institute and PCR have new BOD contact information

Ongoing Duties:

1. Takes over for the President as needed. Maintain vision for Society, and ensure adherence to annual plan.
2. Automatically become the President of the Society in the event of the President's incapacity, resignation, removal, or death; and
3. Attend Society Leadership meetings as possible

### **Officer: Treasurer**

Ongoing Duties:

1. Collect all monies and make deposits on a timely basis. Deposits may be mailed in to the bank. Checks must be stamped with endorsements.
2. Record all financial transactions in Quickbooks. Pay all bills. Keep copies of all bills in file.
3. Reconcile the monthly bank statements.
4. Prepare annual financial statements for tax filings and 1099R forms.

Board Meetings

1. Prepare for each Board meeting a monthly balance sheet and P&L Budget Comparison Report. Make enough copies for the entire Board.
2. Monitor actual income and expenses against budget. Be prepared to report any unusual items or concerns at each Board meeting.
3. Manage CFA Institute reimbursements for Public Awareness and Administrative Support.

### **Officer: Secretary**

Ongoing Duties:

1. Maintain corporate status with state and taxation authorities.
2. Prepare tax filings.
3. Manage election logistics.
2. Send special recognition cards as required.
3. Send notices of membership termination as provided by the By-Laws.

### **VP, Job Placement**

Ongoing Duties:

1. Field career placement inquiries.
2. Manage job postings on website in terms of general strategy.
3. Pursue employers who might engage CFASS job placement services.

### **VP, Programs**

Ongoing Duties:

1. Schedule speakers for monthly programs.
2. Keep apprised of speaker universe.
3. Arrange with speaker speaking engagement details.
4. Introduce speaker biography and short synopsis of speech.
5. Arrange for or produce sufficient copies to hand-out materials prior to meeting.
6. Have speaker gift ready to present to speaker at the end of program.
7. Arrange for speaker expenses to be reimbursed if necessary.
8. Coordinates any corresponding meals and delivery, including payment, with vendors.
9. Report status of future speakers and programs at each Board meeting.

### **VP, Public Awareness**

Ongoing Duties:

1. Keep apprised of CFA Institute's Public Awareness policies.
2. Facilitate public awareness program in conjunction with regular planned programs.
3. Organize public awareness reimbursement.
4. Consider special public awareness events or strategies that would facilitate the awareness of CFASS.
5. Arrange advertisement of major society events.

### **VP, Membership**

Ongoing Duties:

1. Receive membership applications; review for completeness.
2. Facilitate membership process with CFA institute.
3. Encourage and develop new members.
4. Update Board regarding membership status.

### **VP, Technology**

Ongoing Duties:

1. Work with Staff on maintaining website and program registration interface.
2. Coordinate mailing of announcements.
3. Monitor attendee lists.

### **VP, Social Events and Education**

Ongoing Duties:

1. Evaluate education needs of the society.
2. Facilitate organization of events and delegation of duties to run events.
3. Be in touch with membership to understand types of social programs desired.
4. Organize scholarship program.