

FPA OF MINNESOTA

PRESIDENT

Monthly Time Commitment: 20-25 hours

2021: Ryan Antkowiak

DUTIES:

1. **Demonstrate leadership** for the MN Chapter and the 15 person Board of Directors. Check in with directors on their plans of work and give context and guidance for their strategic visions.
2. **Preside** over the monthly Board meetings, Chapter meetings and Executive Committee meetings. Prepare the agenda for these meetings and distribute accordingly. Review with the Executive Director the chapter meeting organizer.
3. **Provide strategic vision** for our Chapter. Creating initiatives and goals for 2021 at the annual board retreat. Maintain the vitality, respect and reputation of the MN Chapter on a national level. President will assist the President-elect in the planning of the annual board retreat / strategic planning day and will review with the Executive Committee an evaluation of the current years' efforts and accomplishments.
4. **Prepare** for board approval the Chapter budget and membership dues proposal for the current year. This effort will be coordinated with the Executive Director and Treasurer.
5. **Stay Informed** – Read and understand communications from FPA National. Be prepared for the monthly board meeting by reviewing the previous month's minutes, financial reports and current agenda prior to the meeting. Stay current through the chapter's communication vehicles including the monthly newsletter, e-mail, social media, and local website. Monitor OneFPA Connect.
6. **Participate actively** – with the goal of making a meaningful contribution to the FPA and our profession - attend the monthly board meetings, annual Symposium event and the annual board retreat/strategic planning day. Participate in the Chapter's major activities including monthly chapter meetings, Career Day, Advocacy Day, Golf event and other local chapter sponsored activities and events that occur throughout the year. Prepare newsletter articles. Attend appropriate national conferences: Alliance Forum and other events as requested by the Chapter.
7. **Support** the Executive Director. Offer guidance, leadership and direction as appropriate to assure smooth chapter operations.
8. **Oversee** the efforts of the committees and Executive Committee. Attend committee meetings as needed/appropriate and keep the Executive Committee informed to ensure that committee meetings are being held and are constructive for the members involved. Offer mentorship, leadership and support to every board member. Connect with each board member to ensure that chapter and committee goals and initiatives are being measured throughout the year and attained or exceeded at years' end.
9. **Support revenue growth** – pay dues to the local and national chapter on time. Financially support chapter-sponsored activities and events as appropriate. Be an ambassador to the profession and our chapter. Utilize business and personal contacts to recruit new members, to retain current members and to obtain sponsorships/partnerships for our chapter sponsored events and activities.

10. **Foster and maintain relationships** with allied professionals especially the FPA MN chapter partners, Best Prep, Prepare + Prosper, etc.
11. **Interview and recruit** individuals to join our Chapter and serve on committees. Be an ambassador for our Chapter and the Financial Planning Association. Persons will be identified from recommendations from board members, partners, announcements at chapter meetings and completed evaluation forms whereby members and guests indicate their interest in serving.
12. **Mentor** the President-elect. Maintain ongoing communications and nurture a strong relationship with the President-elect in the event they must fill-in for the President. This is necessary to not only cover a chapter function or event but to ensure a smooth and orderly transition for the chapter leadership.
13. **Perform** additional duties as required throughout the year.
14. **Monitor and report** Chapter status for National recognition.
15. **Promote and coordinate** Chapter Distinguished Service and Heart of Financial Planning awards.

FPA OF MINNESOTA
PRESIDENT-ELECT

Monthly Time Commitment: 10 Hours
2021 President-Elect: Pete Snow

DUTIES:

1. Perform duties of president in her absence.
2. Oversee work of committees Chair, President, President-Elect and Executive Director will rotate between committee meetings as needed/determined by the Executive Committee based on areas of greatest opportunity to form solid continuity.
3. Attend board meetings; support efforts of other board members; attend programs and activities of our local chapter.
4. Participate in Executive Committee meetings (includes President, President-Elect, Secretary/Treasurer, Chairperson, and Executive Director).
5. Build synergy among committees; help directors obtain and develop vice chairs.
6. Form and chair Nomination Committee. Oversee nominations process as outlined in chapter bylaws.
7. Organize and structure annual strategic planning retreat for current and new board members; submit proposed agenda for review by Executive Committee.
8. Organize onboarding of 2020 Board.
9. Attend Alliance Forum meetings; attend OneFPA Chapter Leaders Conference; attend other national conferences as appropriate.
10. Organize MN contingency attending OneFPA Chapter Leaders Conference in Fall 2020.
11. Organize Volunteer Appreciation Event (with assistance from Pro Bono Director, Financial Literacy Director, and Executive Committee) for all FPA volunteers and allied partners including organizations such as BestPrep, Junior Achievement, etc.

FPA OF MINNESOTA **CHAIRPERSON**

Monthly Time Commitment: 10 Hours
2021 Chairperson: Ingrid Strauss

DUTIES:

1. **Demonstrate leadership** for the MN Chapter utilizing the Team Leadership System that is set forth in the 2021 Plan of Work. Serve under the direction of the President.
2. **Participate in providing strategic vision** for our Chapter. Assist the President in achieving the goals and initiatives that she communicated at the 2021 Strategic Planning Day.
3. **Stay Informed** – read and understand the Team Leadership Guidelines and previous year’s Team Leadership Manual for our chapter. Stay current through the chapter’s communication vehicles including the monthly newsletter, e-mail, social media, local website and ONE FPA Connect.
4. **Participate actively** – with the goal of making a meaningful contribution to the FPA and our profession - attend the monthly board meetings, annual Symposium event and the annual strategic planning day. Participate in the Chapter’s major activities including monthly chapter meetings, Advocacy Day, Golf event, Financial Planning Day and other local chapter sponsored activities and events that occur throughout the year. Prepare newsletter articles as necessary.
5. **Support** the President and other members of the Executive Committee and Board members. Offer guidance, leadership and direction as appropriate and requested to ensure smooth chapter operations. Oversee the activities of the Pro Bono, Public Relations, Professional Issues, and Programs committees maintaining regular communication with the Director and attending monthly committee meetings as necessary.
6. **Support revenue growth** – pay dues to the local and national chapter on time. Financially support chapter-sponsored activities and events as appropriate. Be an ambassador to the profession and our chapter. Utilize business and personal contacts to recruit new members, to retain current members and to obtain sponsorships/partnerships for our chapter sponsored events and activities.
7. **Foster and maintain relationships** with allied professionals especially the FPA MN chapter partners, Best Prep, Prepare and Prosper and other Pro Bono partners.
8. **Interview and recruit individuals** to join our chapter and serve on committees. Be an ambassador for our Chapter and the Financial Planning Association. Persons will be identified from recommendations from board members, partners, announcements at chapter meetings and completed evaluation forms whereby members and guests indicate their interest in serving.
9. **SERVE AS CHAIRPERSON for Financial Planning Week and the Financial Planning Day event.** Working with our allied professionals the mission of this event is to increase awareness of FPA and provide education on financial planning topics and offer Pro Bono financial planning consultations for metro area residents. The role as chair includes recruiting the committee members, conducting planning meetings and general oversight of all activities that must be coordinated to ensure a successful event.
10. **Perform** additional duties as required throughout the year.

FPA OF MINNESOTA
SECRETARY-TREASURER

Monthly Time Commitment: 6 hours
2021: Ron Evans

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
3. Quarterly review budget and profit & loss statement – January, April, July and October Board meetings
4. In coordination with Executive Director, to complete and submit federal and state annual tax reports (1099s due date January 31st; Form 990 due date May 15th)
5. To confirm Executive Director has completed and submitted Annual Registration and MN Nonprofit Corporation to Secretary of State no later than December 31st
6. To take and transcribe minutes for board meetings; keeping abreast of committee activities to ensure follow through
7. Assist in keeping chapter on track with thorough understanding of FPA of MN vision, mission, and goals
8. Support the efforts of other board members; attend board and chapter programs and activities
9. Participate in Executive Committee meetings (President, President-Elect, Secretary/Treasurer, Chairperson, and Executive Director)

FPA OF MINNESOTA
DIRECTOR OF CAREER DEVELOPMENT

Monthly Time Commitment: 10-12 hours
2021 Director: Nick Gearhart

The mission of the Career Development Committee is to provide FPA members, students, career changers and those new to the profession with opportunities to enhance their careers and deepen their involvement in the profession by creating a pipeline between generations and career stages

Duties of Director:

- Organize and promote Career Day
- Collaborate with NexGen on breakout sessions at Symposium
- Be resource for newly forming Communities of Practice
- Serve as resource for career development by acting as point person for questions and collaborative efforts within FPA community
- Communicate with chapter and board members to promote career development programs while ultimately advancing the financial planning profession
- Encourage creation of student chapters at institutions of higher learning in the area and promote the financial planning as a profession to interested college students
- Encourage membership of newly minted CFP® professionals through connections with certificant programs
- Support programs for involvement of FPA members developed by FPA National (MentorMatch)
- Submit periodic articles for the newsletter about both student and regular membership
- Attend monthly board meetings, chapter meetings, chapter activities, Career Day, Symposium, and appropriate national or regional conferences
- Communicate with FPA National as needed

Duties of Committee:

Monthly Time Commitment: 2-5 hours plus committee meetings

- Attend monthly meetings
- Write FPA MN newsletter articles as needed
- Do assigned tasks and update in Basecamp
- Plan and attend Career Day
- Attend Strategic Planning

FPA OF MINNESOTA

FINANCIAL EDUCATION

2021 Director: Position is open

Committee Passion Statement

The Financial Education committee was formed to demonstrate FPA-MN's commitment to helping improve the community. Given the expertise of the members and the needs in the community, the Financial Education committee focus is on helping increase the financial knowledge of people in Minnesota. This includes K-12 students, adults in their working years, and retirees; we call this "K through Gray."

DUTIES of Director and Vice Director:

Monthly Time Commitment: 10 hours plus committee meetings

1. To identify and promote opportunities for FPA-MN members to give back to the community. The committee serves as a link to other organizations making it easy for members to work in areas of their passion.
2. Strengthen existing relationships with outside organizations to provide opportunities for members to promote financial literacy and improve the financial lives of tomorrow's consumers.
3. To encourage and develop new volunteer opportunities for members in areas of member interest.
4. With support of committee, promote financial planning and the FPA association to the public. Develop a strategy to contribute to increasing public awareness of financial planning in general and the FPA specifically through these volunteer efforts.
5. Work to promote the value of using a financial planning professional with other organizations through these volunteer efforts.
6. Attend monthly board meetings, chapter meetings, and chapter activities.
7. Attend the FPA-MN Annual Symposium.
8. As needed, participate in the annual chapter leadership conference.

Duties of Committee Members:

Monthly Time Commitment: 2-5 hours plus committee meetings

1. Seek out members willing to volunteer to add to our database.
2. Sign up members for specific financial education opportunities (email and telephone solicitation).
3. Attend monthly committee meetings (in person or via conference call).
4. Attend FPA-MN New Member Receptions, Strategic Planning Meeting, Volunteer appreciation events and other committee member events as they arise.
5. Coordinate member sign-up for financial literacy activities.
6. Attend one or more meetings of other FPA-MN Committees to promote synergies.
7. Build relationships with organizations that will partner with FPA-MN seeking volunteers
8. Encourage FPA-MN members to become committee members
9. Survey members' interests

FPA OF MINNESOTA
FINANCIAL EDUCATION

Continued

REQUIRED SKILLS AND ATTRIBUTES:

- Passion for a cause that is shared by other members
- Willingness to show up for FPA MN activities
- Willingness to complete responsibilities assigned

BENEFITS FOR COMMITTEE MEMBERS:

Organizational/leadership skills that can be developed through involvement on the committee:

- Lead peers
- Project planning/management
- Public speaking
- Participate in a team setting
- Writing skills
- Listening skills
- Influencing skills

Meet people

- Meet people
- Companionship
- Meet prospective clients
- Current or future employer contacts
- Current or future professional specialists
- Current or future employees or partners

Learn things

- Learn the technical skills used on the committee
- Learn organizational skills (see below)

Familiarity with industry issues

- Become familiar with industry issues
- Get to know leaders in the industry
- Become known in the community
- Become known in the industry
- Help shape industry issues

Give Back

- Give back to the profession
- Gain satisfaction from helping others

Receive

- Get to know the benefits of membership
- Receive discounts of FPA and sponsor services
- Marketing benefits of involvement

FPA OF MINNESOTA

MEMBERSHIP

Monthly Time Commitment: 10 hours plus committee & board meetings
2021 Director: Lory Wessel

DUTIES:

1. To keep members updated on new benefits through the FPA of MN, including connecting with members at renewal to advise of different renewal options.
2. Emphasize member retention and encourage new member participation within the organization.
3. To plan, develop, and execute annual charity golf and bocce ball outing for members and financial planners.
4. To support the development and use of the Chapter website and FPA Connect, assisting the Executive Director in creating “Member Only” services, as well as enhancing the site with additional features.
5. To review added member benefits that add value to MN – FPA membership and include them with membership when deemed appropriate.
6. To assist Executive Director in delivering a quality newsletter to the local membership. Provide regular newsletter contributions regarding committee progress and initiatives.
7. To work with other board members and officers developing strategy for the future of the organization, as well as supporting our current plan of action and any special projects.
8. To attend board meetings, support the efforts of other board members, and attend chapter meetings and activities.
9. Work with other Chapter committees to coordinate action and support their initiatives, to further promote the benefits of membership in FPA of MN.
10. Socials
11. Responsible for the leadership of the Chapter Guide Program as well as supporting the Vice Chair in the weekly and monthly management of the program.
12. Coordinate with Executive Director on new initiatives and project follow through.
13. Promote and encourage new member participation within the organization to support member retention.
14. Work with New Member committee to develop and coordinate new membership initiatives that will increase the number of new members as well as enhance the overall perception of FPAMN.
15. Work with other Chapter committees to support their initiatives.

16. Work with fellow board members in developing strategies for the future growth and development of the organization.
17. Attend national CLC in Denver, if invited.
18. Attend and actively participate in all board meetings, fulfilling all required responsibilities.
19. Organize and coordinate Symposium Breakout session for New Members.
20. Organize table coverage at monthly meetings and Symposium
21. Create an article and provide New Member Highlight for the monthly e-newsletter.

NEXGEN

*2021 Director: Nicole Boor
Monthly Time Commitment: 10-15 hours*

DUTIES OF DIRECTOR:

- **Provide leadership and direction** to the committee via meetings and other communications, to ensure the committee's work fosters trust and is consistent with our Vision.
- **Organize the work** of the NexGen committee with the objectives of effectiveness, efficiency and consistency.
- **Prepare** committee documents including committee meeting notes, annual work plan, director job description, annual budget, etc.
- **Stay informed with FPA National NexGen** to share best practices and work together to achieve the goals and vision of the FPA National NexGen community.
- **Partner with MN FPA committees** to work together to achieve the goals and vision of the MN FPA chapter.
- **Provide strategic vision** to the MN FPA Board of Directors with the goal of enhancing benefits of membership of FPA (MN and National), benefits to FPA partners and allied organizations.
- **Participate actively** with the goal of making a meaningful contribution to the FPA and our profession via attendance at monthly board meetings, Symposium, strategic planning day, leadership conference, and chapter meetings.
- **Support** the Executive Director and President as requested and perform additional duties as needed.
- **Stay informed** of industry trends, topics and initiatives within financial planning.

NEXGEN COMMITTEE MEMBERS:

Responsibilities

Execute the committee's Work Plan

Attend committee meetings

Attend NexGen events

Attend MN FPA chapter meetings and other MN FPA events as schedule allows

Build relationships with potential MN FPA NexGen partners

Encourage non-members to become members

Promoting MN FPA membership benefits and events

FPA OF MINNESOTA

NEXGEN

Continued

Required Skills and Attributes

Ability to execute a portion of the committee's work plan

Passion for building the next generation of financial planning

Time to attend committee meetings and events and MN FPA chapter events as schedule allows

Benefits for Committee Members

Build leadership skills

Networking

Learn MN FPA organizational structure and work

Stay current with industry issues

Give back to the industry

Promote the advancement of the industry of Financial Planning

FPA OF MINNESOTA
DIRECTOR OF PARTNERSHIPS

Monthly Time Commitment: 10 hours/month plus committee meetings
2021 Director Bill Wixon

DUTIES:

1. Obtain partners and sponsors for the FPA so that the organization has enough money to fund its programs and operations (There are several different packages that the Directors/Committee needs to be familiar with in order to discuss and sell effectively to prospective partners. It is the Directors responsibility to completely sell out the allotted partnership opportunities on an annual basis format fulfilling the revenue expectation of the FPA of MN.
2. Have good communication skills and be able to articulate the benefits of partnering with the FPA of MN. (It is important to follow up with potential partners since it is not uncommon for the process to achieving a commitment to take several months.)
3. Prepare verbiage for cover emails to go out with the monthly newsletters; emails would include partner tips, marketing info, benefits, due dates, etc.
4. Have a flexible schedule and be willing to meet with potential partners and learn about the potential partners business and motivations. (This can take time and energy, however face-to-face meetings are the best way to achieve success.)
5. It would be beneficial if the Director and Committee Members had many contacts in the wholesaler community. The more connections they have the easier it is to get referrals to other potential partners.
6. To work closely with the Symposium Director and the Programs Director, possibly attending a few of their committee meetings.
7. Prepare the subsequent year's partnership package (beginning in July-August). Work closely with Programs Director and Symposium Director to set agreed package pricing and features. Network to attract Bronze partners (which do not receive a Symposium booth) to establish pool for future partnership upgrade opportunities.
8. If necessary, conduct committee call sessions to generate partnership leads. 1 hour call session monthly from November through June. (This has not been necessary the last few years.)
9. Attend monthly board meetings, chapter meetings, chapter activities and appropriate national conferences.

FPA OF MINNESOTA

PRO BONO

Monthly Time Commitment: Meeting time – 10-15 hours plus committee meetings
2021 Director: Bruce Lorenz

Duties of Director:

1. To develop awareness of the Pro Bono service within the Chapter, including but not limited to, the Board of Directors, the PR committee, the Government Relations committee, and the membership at large.
2. To recruit members for and encourage active participation within the Pro Bono Committee.
3. To attend board meetings; support the efforts of other board members; to attend programs and activities of our chapter.
4. Attend or have a representative of the Pro Bono Committee attend the Pro Bono training at the Chapter Leadership Conference.
5. To organize, call, and chair the monthly Pro Bon Committee meetings.
6. Co-Chair Financial Planning Day, leading the steering committee that organizes the event locally, in coordination with the national Consortium
7. Help facilitate the development of relationships with new partners, providing suggestions of potential partners to committee members and energizing them into action.
8. Make committee members aware of vast pool of resources available to the committee to energize and create efficiencies within the committee.
9. Collect and report volunteer hours, both at local and National level.
10. Collaborate with Financial Literacy committee to find efficiencies in terms of volunteer management and appreciation.
11. Oversee and delegate Pro Bono requests from FPA website.

Pro Bono Committee

Duties of Committee:

1. Plan and direct pro bono relationships designed to provide financial planning services and education to people in need or crisis. Develop a strategy for meeting the needs of our Pro Bono clients.
2. Pro Bono Clients will include persons who have income of less than \$20,000 single or \$40,000 family, and clients of our partners regardless of income. Pro Bono clients will include any person or family dealing with a crisis.
3. Work closely with the following organizations:
 - a. Prepare + Prosper
 - b. MN LEMA
 - c. Military personnel and their families
 - d. Twin Cities Habitat for Humanity
 - e. Partners serving foster youth
4. Work to develop new relationships for partners with which to work, including exploring relationships with partners with whom FPA National has a relationship (i.e. Goodwill, United Way)
5. Work to promote the value of giving back to our community thorough Pro Bono Service.
6. Recruit, track, and train volunteers to service Pro Bono Clients.
7. To write articles for the newsletter when appropriate to publicize the Pro Bono involvement of members.
8. Find tangible ways to show appreciation for Pro Bono volunteers.

FPA OF MINNESOTA
PROFESSIONAL ISSUES

Monthly Time Commitment: 12-15 Hours

2021 Director: Melissa Glennie

COMMITTEE PASSION STATEMENT:

The goal of this committee is to keep FPA of Minnesota members on the cutting edge of legislative changes and best practices in the evolution of the financial services industry, and to develop and maintain positive interactions with regulators operating in the financial services industry.

DUTIES OF DIRECTOR:

1. The Professional Issues Director will chair the committee, attend board meetings and support the efforts of other board members, as well as attend any regional conference.
2. The Professional Issues Director and committee will monitor pending national and state legislation that has an impact on the financial planning industry
 - a. Committee members and the Professional Issues Vice-Chair will monitor national legislation by utilizing the FPA resources.
 - b. Committee members and Professional Issues Vice-Chair will monitor legislative and regulatory activity in the state of Minnesota developing legislative contacts at the Minnesota legislature and serving as a liaison between FPAMN and the MN Department of Commerce.
2. The Professional Issues Director and committee will communicate with members about pending and current legislation that has an impact on the financial planning industry.
 - a. Appropriate and timely articles will be prepared for the newsletter.
 - b. A strategy for dealing with letter writing, testifying at hearings, and/ or phone campaigns in response to pending legislation will be developed and implemented.
3. The Professional Issues Director and committee will communicate with legislators and regulators on the FPA Chapter's position on pending regulations and legislation.
4. The Professional Issues Director and committee will develop a strategy that will position the FPAMN Chapter as a resource to Minnesota legislators and regulators on financial planning issues that takes advantage of our consumer orientation and our open forum, designation-neutral identification.

FPA OF MINNESOTA
PROFESSIONAL ISSUES
Continued

DUTIES FOR VICE DIRECTOR:

1. Assist chair and facilitate committee meetings when needed.
2. Attend Board of Directors' meetings when chair is unavailable.
3. Transition to Committee Chair (Director) in the following year.

DUTIES OF COMMITTEE MEMBERS:

- Attend monthly committee meetings
- Write 1-2 FPA-MN newsletter articles about legislative or regulatory matters that impact members
- Research and update committee at monthly meetings on area of passion/expertise
- Attend FPA-MN New Member Receptions, annual strategic planning meeting, volunteer appreciation events and other committee member events/social gatherings
- Encourage/recruit FPA-MN members to become committee members based on principle that recruits are targeted according to match between individual's expertise and committee need
- Coordinate with FPA's national government relations leaders to form position on local and state issues
- Develop relationships that facilitate proactive influencing of legislation that supports the FPA mission
- Abide by a professional code of ethics

REQUIRED SKILLS AND ATTRIBUTES:

- Passion for a cause that is shared by other members
- A commitment to follow-through on expectations and responsibilities assigned
- Effective communication skills (listening, writing, influencing, researching legislation and regulations, public speaking, teambuilding)

BENEFITS FOR COMMITTEE MEMBERS:

- Development of organizational and leadership skills
- Opportunity to connect with people with similar interests
- Learn from others about legislative and regulatory issues
- Increase familiarity with/help influence industry issues
- Give back to the profession

FPA OF MINNESOTA **PROGRAMS/EDUCATION**

*Monthly Time Commitment: Meeting time – 5-7 hours; contacts and follow up time 3 hours
2021 Director: Rebecca Bell*

Committee Passion Statement

With the interest of the membership in mind, we ensure the monthly programs have a strong educational basis as well as engaging, non-soliciting speakers. By polling the members on topic, speakers, and location, we attempt to identify their wants and needs in an effort to maximize membership attendance.

Committee Member Duties

Seek out ideas for speakers and topics locally and nationally

Attend monthly committee meetings

Attend FPA of MN New Member Receptions, Strategic Planning Meeting, and other committee member events as they arise

Coordinate 1-2 meetings per year

Build relationships with organizations that will partner with FPA of MN seeking strong educational content

Encourage FPA of MN members to become committee members

Survey members' interests

Required Skills and Attributes

Passion for learning

Willingness to show up for FPA of MN activities

Willingness to complete responsibilities assigned

Benefits for Committee Members

Organizational/leadership skills that can be developed through involvement on the committee:

- Run a meeting
- Build a team
- Lead peers (without a stick)
- Project planning/management
- Public speaking
- Participate in a team setting
- Learn (a semblance of) Roberts Rules of Order
- Writing skills
- Listening skills
- Influencing skills

FPA OF MINNESOTA
PROGRAMS/EDUCATION

Continued

Meet people

- Meet people
- Companionship
- Meet prospective clients
- Current or future employer contacts
- Current or future professional specialists
- Current or future employees or partners

Learn things

- Learn the technical skills used on the committee
- Learn organizational skills (see below)

Familiarity with industry issues

- Become familiar with industry issues
- Get to know leaders in the industry
- Become known in the community
- Become known in the industry
- Help shape industry issues

Give Back

- Give back to the profession
- Want to help

Receive

- Get to know the benefits of membership
- Receive discounts of FPA and sponsor services
- Marketing benefits of involvement

FPA OF MINNESOTA
PUBLIC RELATIONS
Director/Vice-Chair Responsibilities

Monthly Time Commitment: 5-10 hours plus committee meetings
2021 Director: Pete Snow

RESPONSIBILITIES AND STRATEGIES:

1. Oversee the Chapter Public Relations Committee
2. Oversee the development of Social Media efforts
3. Oversee and provide input on the monthly FPA Newsletter
4. Attend monthly committee, board meetings; chapter meetings and chapter activities
5. Coordinate with PR Firm outreach activities and PR initiatives
6. Serve or have a committee member serve as part of the Steering Committee to assist in coordinate of Financial Planning Day Event outreach and promotion; 1 hour monthly with increase to 1 hour weekly six weeks before the event.
7. Serve as intermediary to Goff Public for any chapter meeting recordings, event photos, or other items which could be shared publicly.
8. Distribute similar content (recordings, media successes, etc...) to Jessica for additions to FPA MN website.
9. Create public awareness of the importance of the financial planning profession
10. Promote the image of FPA MN members as ethical and client-centric advisors
11. Maintain an open dialogue with all other FPA-MN committees to ensure the PR committee is aware of their specific objectives, events, etc...
12. Promote Financial Planning Association to the media
13. Coordinate efforts for publicity campaigns
14. Integrate national public relations programs with local efforts whenever feasible
15. Communicate with the FPA National's public relations committee and staff as media opportunities become available.
16. Continue to update the media contact list
17. Encourage and develop new media contacts

FPA OF MINNESOTA
PUBLIC RELATIONS

Committee Member Responsibilities (non-Goff Public employees)

Monthly Time Commitment: 1-2 hours plus committee meetings
2021 Director: Pete Snow

RESPONSIBILITIES AND STRATEGIES:

1. Attend committee meetings regularly.
2. Provide input on the monthly FPA Newsletter at committee meetings.
3. Own a project each year. The project can remain the same or rotate over time.
4. Be mindful of FPA-MN PR opportunities and provide ideas to committee and Goff Public.
5. Maintain monthly contact with assigned FPA-MN committees to increase awareness about how the PR committee can add value and enhance the other FPA-MN committees. Where possible, look to expand these relationships at chapter meetings or other FPA functions.

FPA OF MINNESOTA CHAPTER
ASCEND (formerly SYMPOSIUM)

2021 Director: Jeff Drayton

COMMITTEE PASSION STATEMENT

To orchestrate an annual Symposium for the FPA of Minnesota by offering an excellent education program with CE credits for multiple professional designations (CFP, insurance licenses). The Symposium committee seeks to grow the annual attendance of the Symposium, encourage new membership in FPA, provide varied speakers and topics to facilitate ongoing education and promote the annual MN FPA Symposium as one of the top financial planning conferences in the Midwest.

DUTIES OF DIRECTOR:

Monthly Time Commitment: 15 hours

Symposium Time Commitment: 30 hours+

Demonstrate leadership and provide mentorship and direction for the Symposium committee utilizing the Team Leadership System of fostering trust, creating vision, developing strategy, energizing alliances, activating transformations, measuring progress, achieving results and resetting the vision.

Provide strategic vision for the goal of presenting a better Symposium each year by reaching out to fellow board members, partners, the national organization, chapter leaders, allied organizations and chapter members along with careful review of the completed evaluation documents.

Stay informed of industry speakers, topics, and current initiatives within financial planning.

Prepare the annual plan of work, strategic plan, job description and annual budget monthly along with preparation for Symposium committee meetings, monthly board meetings, chapter meetings, committee communications, promotion of Symposium, and other activities as needed.

Participate actively with the goal of making a meaningful contribution to the FPA and our profession via attendance at monthly board meetings, Symposium, strategic planning day, leadership conference, and chapter meetings.

Support revenue growth by paying dues to the local and national chapter on time, supporting chapter events and recruitment of new members. Seek to be an ambassador to the profession and our chapter and retain current members and sponsorships.

Foster and maintain relationships with allied professionals (especially the FPA MN chapter partners) and other FPA MN committees, specifically the programs committee.

Interview and recruit individuals to serve on the Symposium committee. Persons will be identified from recommendations from Board members, announcements at chapter meetings and completed evaluation forms whereby they indicate their interest in serving on the committee or acting as a volunteer at the annual Symposium event.

Support the Executive Director and President as requested and perform additional duties as needed.

FPA OF MINNESOTA
ASCEND (formerly SYMPOSIUM)
Continued

DUTIES OF COMMITTEE MEMBERS:

Monthly Time Commitment: 5 hours (monthly committee meeting, duties)

Symposium Time Commitment: 25 hours (setup, 2 day event, teardown)

- Attend monthly committee meetings and assist in planning and preparation of annual symposium
- Actively participate in annual Symposium event planning and attend both dates of event
- Complete assignments (coordinating speakers, promotion, gathering CE information, working together on calling about speakers, phone-a-thon, etc.)
- Prepare newsletter articles relative to the Symposium event in the FPA MN Newsletter
- Encourage attendance at the Symposium for all FPA members and colleagues
- Discuss and encourage FPA-MN members to become committee members
- Have fun and learn about the industry!

Required skills and attributes:

- Willingness to FULLY PARTICIPATE in committee activities, events and meetings
- Complete responsibilities assigned within appropriate timeline
- Provide feedback and suggestions on speakers, topics, and resources for program content and event
- Communication skills

Benefits of being on the Symposium Committee:

- SKILL DEVELOPMENT:
 - Organizational and Leadership skills
 - Project planning/management
 - Public speaking
 - Teamwork
 - Writing skills
 - Listening skills
 - Influencing skills
 - Negotiation skills
- NEW INTRODUCTIONS:
 - Meet new people within the FPA of MN and nationally
 - Learn about FPA of MN and other allied organizations
 - Obtain new contacts for your career, employment or personal needs and meet leaders in the industry
- LEARN:
 - How to work with speakers
 - How to organize a top-rated event
 - Procure and follow up with speakers and presenters
 - Understand CE regulations, and
 - How to promote an event
- GIVE BACK: you get to help and give back to your profession and community
- DISCOUNTS: As a *participating* and *active* Symposium committee member you obtain admission to the Symposium free of charge.