

Membership

The membership committee will coordinate/conduct the following activities with assistance from all members:

Specific Responsibilities

- Promotes the Financial Planning Association and Chapter mission and purpose.
- Attend monthly board meetings, chapter meetings and chapter activities.
- Attend chapter meetings and events. Announces new members and anniversaries at meetings.
- Meet and greet all new members and guests at each event both before and after the event to promote the value of FPA and encourage bringing other guests.
- Be available to assist with showing around new members at chapter meetings.
- Be prepared to sign up new members at any FPA Austin event.
 - This includes being able to articulate benefits of the FPA Membership.
- Follows up with new members and welcomes them to FPA Austin; encourages them to attend the next event.
- Follows up with FPA members who did not renew their membership monthly and encourages them to renew.
- Contact non-member CFPs and encourages their membership.
- Recruit members from sponsors, allied professionals, and financial planning firms.

Chapter Executive's duties as they relate to Membership– works very closely with Membership Director:

- *Share dropbox files to easily manage communication with one another
- *Sends Welcome Letter to new member, cc Membership Dir, NexGen, President, Women's Initiative for female members.
- *Sends email to members whose memberships are about to expire at end of month. Final email includes survey.
- *Send email to members who renewed thanking them for their membership
- *Sends anniversary email
- *Sends webinar and in-person guests email with FPA membership info