

President

The president will be the chief elected officer of the Chapter and, subject to the direction of the Chapter Board of Directors, will have general responsibility for the affairs and property of the Chapter and general supervision over its other Officers and agents. The president will perform all duties incident to the office of President and will see that all orders and resolutions of the Chapter Board of Directors are implemented.

Specific Responsibilities

- Serves as the President of the FPA Austin chapter and as a member of the chapter board. Serve as an ambassador for the Chapter and the Financial Planning Association.
- Meets or contacts each board member to assist and serve as a resource for them to offer mentorship, leadership and support of their goals.
- Leads and manages the Board. Holds board accountable to doing their job.
- Promotes the Financial Planning Association and Chapter mission and purpose.
- Responsibilities begin with the organization of the Annual Strategic Planning Meeting. Provide strategic vision for the Chapter, creating initiatives and goals. Confirms all returning board members and works with President-Elect to find new board members.
- Sends email to Board with Board Meeting notice. Presides over all board meetings. Prepare agenda, set up zoom if virtual, distribute agenda to board members with reminder 3-5 days out.
- Has general and active management responsibilities for the activities of the chapter and ensures that all orders and resolutions of the Board of Directors are carried out.
- With the Treasurer, Prepare the Chapter budget and membership dues proposal for the current year.
- Reads and understands communications from FPA National.
- Conducts the overall greeting and introductions during the FPA Austin Chapter Meetings.
 - Prepare introduction, special announcements
 - Recognize Partners
- Helps prepare the incoming President to lead the Chapter to ensure a smooth and orderly transition for the chapter leadership.
- Provides ready-to-go content to Chapter Executive for website, invites, surveys and newsletter
- Serves as head of the Compensation Committee to review the Chapter Executive's Salary and Bonus.
- Chooses location/day/time for year-end Partner/Board Appreciation.

The involvement of the President is essential to provide the leadership for the Board of Directors and the Chapter.