

Membership Director – Role & Responsibilities

The Membership Director leads efforts to grow and retain FPA Austin membership by welcoming new members, engaging current members, and promoting the value of FPA. This role ensures that members feel connected, informed, and supported as part of the chapter community.

1. Leadership & Chapter Engagement

- Promotes the mission and purpose of the Financial Planning Association and the Austin Chapter.
- Attends monthly Board meetings, chapter meetings, and chapter activities.

2. Member Engagement & Outreach

- Attends chapter meetings and events to meet and greet new members and guests, encouraging involvement in FPA Austin.
- Understands FPA membership levels and can clearly articulate the benefits of membership.
- Follows up with new members (after the Chapter Executive's welcome email) to personally welcome them and encourage event participation.
- Hosts **Membership Orientation Zoom calls** 2–4 times per year to review member benefits and help new members get connected (new for 2026).
- Follows up with members who have not renewed (after the Chapter Executive's outreach) to encourage renewal and continued engagement.

3. Recruitment & Growth

- Recruits new members from sponsors, allied professionals, financial planning firms, and other relevant networks.
- Participates in national FPA Membership calls with Membership Chairs from other chapters to learn best practices and bring new ideas back to the Austin Chapter.
- Encourages innovative programs and initiatives that support membership growth and help current members fully engage with all FPA has to offer.

4. Collaboration & Communication

- Works closely with the Chapter Executive to ensure timely communication and follow-up with new, renewing, and prospective members.
- Provides ready-to-use content to the Chapter Executive for:
 - Website updates
 - Event invitations
 - Surveys
 - Newsletters