

President - Role & Responsibilities

The President is the chief elected officer of the FPA Austin Chapter. Under the direction of the Board of Directors, the President has general responsibility for the affairs, property, and operations of the Chapter and provides leadership and oversight to ensure that all Board directives, initiatives, and resolutions are implemented effectively. Their involvement ensures that the Board functions effectively, the Chapter remains mission-focused, and members receive meaningful value throughout the year.

1. Leadership & Governance

- Serves as President of the FPA Austin Chapter and as a voting member of the Board of Directors.
- Acts as an ambassador for both the Chapter and the Financial Planning Association.
- Leads and manages the Board, holding members accountable for fulfilling their responsibilities.
- Promotes the mission and purpose of the Financial Planning Association and the Austin Chapter.
- Provides mentorship, leadership, and support to each Board member by meeting or checking in with them individually.

2. Strategic Planning & Chapter Direction

- Organizes and leads the Annual Strategic Planning Meeting as President-Elect for the upcoming year.
- Provides strategic vision for the Chapter, establishing initiatives and goals for the year.
- Confirms returning Board members and collaborates with the current year's President to identify and recruit new Board members.
- Ensures all Board resolutions and directives are carried out and that chapter activities align with strategic goals.

3. Board Management & Administration

- Prepares agenda and presides over all Board meetings.
- Maintains active oversight of chapter operations and ensures smooth coordination across all Board functions.
- Reads and stays informed on communications from FPA National.

4. Financial Oversight

- Works with the Treasurer to prepare the annual Chapter budget and membership dues proposal.
- Ensures financial decisions align with chapter goals and fiduciary responsibilities.

5. Chapter Meetings & Public Presence

- Conducts greetings and introductions at FPA Austin Chapter meetings.
- Reviews announcements, prepared by Chapter Executive, and adds any additional comments or updates as needed.
- Represents the Chapter at events and maintains a visible leadership presence.

6. Transition & Leadership Development

- Prepares the incoming President to assume leadership, ensuring a smooth and orderly transition.
- Supports leadership development within the Board and encourages future leaders.

7. Communications & Collaboration

- Provides ready-to-use content to the Chapter Executive for:
 - Website updates
 - Surveys
 - Newsletters
- Collaborates closely with the Chapter Executive on chapter operations and communications.

8. Compensation Committee

- Serves as Chair of the Compensation Committee to review and determine the Chapter Executive's salary and bonus.

9. Partner & Board Appreciation

- Selects the location, date, and time for the year-end Partner/Board Appreciation event.

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