

Secretary - Role & Responsibilities

The Secretary supports the effective functioning of the Board by maintaining accurate records, documenting decisions, and ensuring continuity through organized meeting documentation. This role plays a key part in chapter governance and communication.

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.
- Supports the efforts of other Board members and participates in chapter programs.

2. Meeting Documentation & Recordkeeping

- Takes minutes during each Board meeting and uploads finalized minutes to Dropbox.
- Records attendance at each Board meeting.
- Documents all motions and votes during Board meetings.
- Edits or updates minutes based on Board feedback.
- Provides historical context from previous meeting minutes when needed to support Board discussions or decisions.

3. Governance Support

- Participates in Board votes as a voting member.
- Ensures meeting records are accurate, organized, and accessible for future reference.
- Stands in for the Chapter Executive at Lunch Meetings when needed.