



OF
THE *TRIANGLE*

NOMINATIONS PROCESS FOR 2016 - 2017 ELECTIONS

Nomination period opens

Nominations close

Nominating Committee meets to determine slate of candidates

Board of Directors approves slate

Candidates are notified

2016-2017 board members take office

QUALIFICATIONS FOR BOARD SERVICE

A director must be an active member of the FPA and chapter in good standing to be eligible for nomination and election to any elective office of FPA of the Triangle (FPAT). Nominees for vacant board positions are determined by the Nominating Committee according to criteria established by the FPAT Nominating Committee and approved by the Board of Directors.

DESIRED CHARACTERISTICS OF BOARD MEMBERS

- History of volunteering in some capacity, preferably with FPA
- Holds/has held leadership role in FPA or a similar organization
- Ambassador to the organization; willing to promote and support FPA to members and the public
- Competent communicator
- Flexible, collaborative, forward-thinking
- Responsive, reliable
- Able to capably manage electronic files and communication
- Has no serious conflict of interest with FPA
- Available to serve given time commitment requirements (*see below*)
- Engaged in the financial planning profession
- Engaged with the financial planning community; demonstrates awareness of the range of needs of affiliate members

POSITION TERMS

A term of office shall begin at the annual business meeting (January) and shall terminate at the annual business meeting in the year corresponding to the length of term of the appointment.

- Officers of the board serve one-year terms (President, President-elect, Secretary/Treasurer, Past President)
- Directors serve staggered terms up to five (5) years.

POSITION OPENINGS

Although we are currently seeking several new Board members, there is an immediate need for the following positions:

***Social Media/Technology Director**

***Programs Director**

***NexGen Director**



OF THE TRIANGLE

TIME COMMITMENT

Currently the FPAT Board meets for a two-hour board meetings monthly plus time to read and respond to board communications and board meeting materials.

Board members may be asked to serve as board liaisons to FPA committees. If so, board liaisons are expected to attend and participate in committee meetings/conference calls including making time to read committee communications and meeting materials.

Board members are expected to attend FPAT events wherever possible.

Board Meeting Dates:

January 12, 2016
February 9, 2016
March 8, 2016
April 12, 2016
May 10, 2016
June 7, 2016
July 12, 2016
August 9, 2016
September 6, 2016
October 11, 2016
November 8, 2016
December 6, 2016 (Strategic Planning Meeting)

Chapter Meeting Dates:

January 13, 2016 (New Member Event/Chapter Meeting)
February 11, 2016 (Chapter Meeting)
March 10, 2016 (Ethics Meeting)
April – NexGen Event
May 12, 2016 (Dinner Event)
June – Women of FPA Event
July 14, 2016 (FREE CE DAY)
August – Encore Member Event
September 8, 2016 (Chapter Meeting)
October 13, 2016 (Symposium)
November 10, 2016 (Chapter Meeting)

NOMINATION REQUIREMENTS

- 1-3 paragraphs outlining
 - a) your reasons for applying for board service
 - b) how your professional background and experience will help advance the board's strategic goals
 - c) how you feel you exemplify the desired characteristics of board members
- Names and contact information of two professional references that are prepared to speak to the Nominations Committee, if necessary, regarding your personal and professional qualifications for board service. (*FPAT board members, staff and members of the FPAT Nominations Committee are ineligible to serve as professional references.*)
- A current head shot for potential communication with members

BENEFITS TO SERVICE

- Complimentary Lunch at Board Meetings
- Complimentary Registrations to all Chapter Events
- Continuing Education Credits for attending qualified meetings
- Excellent Networking Opportunities
- Résumé Enhancement of Public Service Credentials

QUESTIONS

Please call Executive Director, Suzanne Morris – 919-232-0120 or email administrator@fpatriangle.org