



OF
THE *TRIANGLE*

NOMINATIONS PROCESS FOR 2019 - 2020 ELECTIONS

Nomination period opens

Nominations close

Nominating Committee meets to determine slate of candidates

Board of Directors approves slate

Candidates are notified

2019-2020 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**



OF THE **TRIANGLE**

TIME COMMITMENT

Currently the FPAT Board meets for a two-hour board meeting 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 8, 2019
February 12, 2019
March 12, 2019
April 19, 2019
May 7, 2019
June 11, 2019
July 9, 2019
August 6, 2019
September 10, 2019
October 8, 2019
November 12, 2019
December 10, 2019 (Strategic Planning Meeting)

Chapter Meeting Dates:

January 10, 2019
February 14, 2019
March 14, 2019 (Ethics Meeting)
April – After Tax Social
May 9, 2019 (Practice Management)
June 13, 2019
July 11, 2019 (Free CE)
August – NexGen Event
September 12, 2019
October 10, 2019 (Symposium)
November 14, 2019
December – No meeting

NOMINATION REQUIREMENTS

1. 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
2. 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.*)
3. 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, Megan Collier – 919-232-0120 or email administrator@fpatriangle.org.