



Chapter Elections 2018 FAQs

For Chapter committee members and Chapter Chairs

What is expected of me?

FPA Chapter committees work closely with the FPA to achieve our strategic goals of **connecting and uniting members** and **creating a better financial future for Australians**. The Chapter Chair and Committee members are ambassadors of the FPA, responsible for creating awareness and increasing member engagement in their Chapter through various channels such as:

- Member events
 - Maximum four per year (see below for more detail on involvement in events)
- Student engagement
 - Use the FPA toolkits to engage with high and primary schools
 - Possible attendance at Universities to promote financial planning as a career
- Support the FPA to deliver its strategic goals
- Be the voice of the FPA in your local community by communicating news and updates from head office
- Be the voice of your community by sharing feedback from your Chapter to the FPA
- Community service
 - Support and create awareness of the FPA's foundation, The Future2 Foundation
 - Chapters to raise \$90,000 for the Future2 Foundation through awareness and fundraising in the 2018 – 2019 financial year
 - Support the FPA's pro bono program
- Chapter Promise – As a committee member you will be asked to sign the Chapter Promise which will ensure all members are willing participants and advocates of the FPA.

What's in it for me?

- Being a part of the FPA Chapter committee is a rewarding role where you will increase your networking opportunities, gain leadership, planning and strategy skills outside of your everyday scope and raise your profile
- Opportunity to work with your fellow peers, encourage other financial planners to be involved in the FPA, and raise awareness of the profession within the wider community
- Receive briefings on key FPA activities from media releases, policy updates and FPA announcements
- Receive discounts at events including the FPA Professionals Congress
- Pathway to FPA and Future2 Board roles.



What is the expected time commitment?

Each FPA Chapter will differ in terms of how many committee meetings and events are held throughout the year, however as a guide:

- Involvement in running four events per year (2 – 4 hours per week in the lead up to an event)
- Attendance at approximately four committee meetings per year (1 – 2 hours per meeting)
- Active participation in creating awareness of Future2 and fundraising for the Make the Difference Grants!
- Active participation in student engagement, ie. attending a university open day, using the school toolkits including Banqer in one school per year and supporting the Sponsor a Student to Congress program (8 – 10 hours per year)

How does the FPA support the Committee?

The FPA Member Engagement team and Regional Chapter Chair (RCC) committee will support each Chapter through:

- Events, sponsor and speaker management – see below for further information
- Regular communication
 - Chapter Chair toolkit with updates from the FPA sent on a monthly basis
 - The RCC who is chaired by a FPA Board Representative and coordinated by the FPA Chief Operating Officer ensures a line of effective communication from Chapter Chairs through to the FPA Board
- Tools
 - The FPA will provide tools that the committee can use to run events, increase awareness and fundraising for Future2 and increase student engagement activities

What is my involvement with member events?

Chapter events exist to maintain regular education, continuing professional development, communication and engagement within the membership, at a local level, and where possible to raise awareness and support Future2.

The FPA events team will assist the committees with the events process as much as possible. The role of the committee is to support the Chapter Chair in relation to event management including but not limited to the following tasks:

Pre-event:

- Provide the events team the planned Chapter events schedule for the year
- Liaise with FPA events team regarding venue, topic, invitation scheduling, sponsor management etc.



- Confirm speaker and send speaker presentation to the FPA events team for CPD accreditation
- If sponsorship assistance is required please liaise with FPA Events Manager and Sponsorship Manager

During the event:

- Venue set-up
 - FPA Banner, Future2 yellow bucket and raffle items
 - Registration desk with name tags and attendee list
 - Check AV, speaker presentation and venue set up including food and beverage service
- Manage registration process, including name and credit card details of any additional attendees (walk-ins) on the day
- Introduce speaker: provide an introduction from the FPA and any FPA updates. Note: the FPA will provide any PowerPoint presentations required
- Take photos of the event and send them to the events team for use in the Money & Life magazine
- Pack down event, including registration desk, collect banner and Future2 bucket/fundraising.

Post-event:

- Send registration sheet to FPA Events team as soon as possible for survey and CPD purposes
- Send the FPA Events team any final invoices to be paid (venue, speaker etc.)
- Deposit any Future2 fundraising directly to the Future2 Account
- Send your event photos to the events team so we can profile your efforts in the Money & Life magazine.