



Dear BetterInvesting member,

Thank you for your interest in volunteering with our Chapter.

Investing expertise is not a pre-requisite, nor is expertise in BI investment strategies or even being in an investment club. The most important characteristic of a Chapter Volunteer is a willingness and desire to help other BI members, and future members, be successful on their journey to financial independence through investing the BI way.

There are various levels of volunteering depending on the amount of time and effort that you can devote. Listed in order of increasing experience and responsibility these are:

- 1) Volunteer,
- 2) Associate Director,
- 3) Director and
- 4) Officer.

Directors serve a 3 year term while all other positions are for 1 year. All terms follow BI's fiscal year, October through September.

How do you get started?

Begin by attending some Board Meetings.

Decide how your skills fit the tasks that need doing.

Start helping out where needed.

Submit the attached Volunteer Application.

The Board of Directors votes to accept you as a Volunteer.

Sign the Volunteer Standard of Conduct when it is mailed to you.

Acquaint yourself with the Volunteer Resources portion of the BI website, <https://www.betterinvesting.org/volunteer-resources/home>. Chapter Operations and Volunteer News & Training sections are especially useful to new volunteers.

If you are interested in volunteering in any way, please join us. We look forward to seeing you at the next Board meeting.

We wish you happy volunteering,
Your Board of Directors

2020.09.12



Volunteer Application & Position Preferences

Name _____ Cell Phone _____

Address _____ Landline _____

City _____ Zip _____

Email Address _____

BI Membership Number _____

Are you or have you been a Member of an Investment Club? ____ Yes ____ No

Name of Investment Club _____

Where? _____ When? _____

I am interested in volunteering in the following capacities:

Check all positions that apply.		
<input type="checkbox"/> Budget/Finance/Audit	<input type="checkbox"/> GTM Organizer	<input type="checkbox"/> Outreach/Money Smart Week
<input type="checkbox"/> Club Support/Visit Coordinator	<input type="checkbox"/> Marketing/Publicity	<input type="checkbox"/> President/Chairman
<input type="checkbox"/> Communications/Newsletter	<input type="checkbox"/> Materials & Equipment	<input type="checkbox"/> Secretary/Assistant Secretary
<input type="checkbox"/> Data Manager	<input type="checkbox"/> Member Growth/Support	<input type="checkbox"/> Special Assignment
<input type="checkbox"/> Education Programs	<input type="checkbox"/> Member Outreach	<input type="checkbox"/> Teacher
<input type="checkbox"/> Email Communications	<input type="checkbox"/> Mentor	<input type="checkbox"/> Treasurer/Assistant Treasurer
<input type="checkbox"/> Events Chair	<input type="checkbox"/> Model Club Officer/Contact	<input type="checkbox"/> Vice President
<input type="checkbox"/> Events Registrar	<input type="checkbox"/> National/BIVAB Volunteer	<input type="checkbox"/> Visit-A-Club Contact
<input type="checkbox"/> Facilities Coordinator	<input type="checkbox"/> Nomination Committee	<input type="checkbox"/> Web Author

Are there special skills, professional skills, leadership skills, etc. that you would like to utilize as a volunteer? Please Specify:

If you have geographic preferences for your volunteer work, please specify:

To submit your application or obtain more information, please contact our Chapter Secretary at secretary@southflorida.betterinvesting.net. Alternatively, you can hand a hardcopy to any of our Volunteers.

2020.09.12

Additional Information

Description of volunteer categories:

Volunteer	A BetterInvesting member who wishes to contribute to the chapter but does not want to attend meetings and has no interest in ever becoming a full board member. This is someone who has contact with members or member information and needs to sign the BetterInvesting Volunteer Standard of Conduct.
Associate Director	A BetterInvesting member who would like to eventually become a voting chapter board member. Generally, someone remains an associate for just a year or two to see if they are a fit to become a full voting director.
Director	A full, voting chapter board member that is expected to attend all meetings.

Every volunteer must have at least one specific responsibility.

Budget/Finance	Prepares budget for the chapter. Includes audit committee members who regularly reviews accounting reports, transactions, and verifies bank reconciliations.
Corporate Contact	Coordinates with home office Director of Corporate Relations for sponsorship of major events. Contacts corporations for presentations or sponsorship of events.
Education Programs	Curriculum Coordinator for investment education and club operations training. Coordinates regional chapter education resources.
Email Communications	Uses the Email Marketing Tool (currently Interspire). Maintains Guest email list.
Facilities Coordinator	Looks for locations for events/classes and makes reservations.
Visit-A-Club Contact	Administrator of the Visit-A-Club Program. Duties may include processing club applications, updating club lists, coordinating with Email Communications (Interspire), Newsletter, and Marketing/Publicity to send reminders and announcements to members. Recruits clubs to participate in program.
GTM Organizer	The chapter license holder. Schedules and starts Meetings and/or Webinars in LogMeIn application.

Marketing/Publicity	Oversees that chapter events and information are publicized effectively to existing members and externally to the public; liaison to media (radio/newspapers). Develops content for chapter emails, chapter brochure, chapter website, chapter newsletter or other marketing materials.
Materials & Equipment	Maintains and/or tracks equipment and materials. Maintains the Inventory of Chapter Assets spreadsheet for Rechartering.

Member Outreach	Brainstorms efforts to reach existing members which may include phone call campaigns, writing contents for chapter communications (postcards, email blasts, newsletters, website, etc.). Includes a Club Visit Coordinator who receives requests for club visits and arranges a volunteer director to visit. Could also be a coordinator for programs like the FINRA 'Outsmarting Investment Fraud' program.
Model Club Liaison	The primary contact for model club matters. Reports to chapter board on model club activities. Contact for Region Manager or home office on model club matters.
Mutual Fund Chair	Conducts classes on mutual fund investing. Is the primary contact for cross-chapter or nationwide mutual fund efforts.
New Member Growth	Main person(s) who are coordinating new member growth initiatives. This is the person that would share information with regional management and the home office regarding new member growth activities.
Nomination Committee	Recruits new board members. Nominates executive board. Verifies and encourages renewal of current board.
President/Chairman	Presides over meetings. Provides leadership to operations. Establishes and appoints committees. Oversees written operating procedures to define board policy.
Registrar	Handles registrations for classes and events.
Secretary	Records Chapter Board meeting minutes.
Special Assignment	For any director, associate director or volunteer that does not have a regular job. Special Assignments might include administrative tasks not identified elsewhere or short-term projects. (Examples: Stock Contest Administrator, Librarian, "Food" person, Chapter Recognition/Awards, First Cut Chair, Calendar Coordinator, etc.).
Special Events Chair	Organizes, coordinates, and supervises special functions, educational events, annual elections meeting, and/or annual planning meeting.
Teacher	Develops written materials and/or presents classes, webinars, lectures and talks.
Treasurer/Assistant Treasurer	In charge of all funds collected and disbursed by chapter. Maintains detailed records of all transactions. Provides monthly reports to chapter board. Files quarterly and annual financial information to home office.
Vice-President	Often the next person in line to become president. Chapters may have more than one Vice-President.
Web Author	Responsible for posting information to the chapter website and keeping information on the chapter website current. May not be responsible for content creation.
Youth Chair	Public outreach to high schools and private institutions concerning youth investing education.