

FMA Meeting – February 15, 2010

Objective: To figure out the responsibility of each officer; the goal of FMA in the 6 months:

Position Details:

- **President:**
 - Setting agenda for the meeting, utilizing the requests from each officer
- **Vice President:**
 - Assumption of the duties of the president in the event he/she is unable to complete the term of office.
 - Working with the program coordinator to acquire speakers and plan functions centered around the speakers' areas of expertise.
 - Coordinating and directing the activities of committees.
 - Assisting in the selection of nominees for the chapter's Outstanding Financial Executive and Honorary National Honor Society Members.
- **Finance Officer:**
 - Reporting to the chapter's Board of Directors on all matters regarding the financial status of the chapter.
 - Maintaining accurate records of chapter dues and submitting the applications and fees to the FMA office in a timely manner.
 - Securing signature cards and all necessary papers for opening (or maintaining) the chapter's bank account.
 - Preparing a tentative budget for presentation to the chapter's Board of Directors.
 - Preparing an annual and bi-annual financial statement for presentation to the chapter's Board of Directors.
- **Secretary:**
 - Blackboard maintenance
 - Taking attendance at each chapter's meetings
 - Preparation of the meeting minutes
 - Maintain the chapter's by-laws and the constitutions
- **Event Officer:**
 - In concert with the Vice President, organize and coordinate professional meetings, social networking, and/or community service events each quarter
 - Work with Marketing Officer to advertise club sponsored events
 - Lead and direct the Events and Banquet Committees, and report activities to the Board of Directors
- **Marketing Officer:**
 - Creating marketing strategy for the organization
 - Recruiting strategies
 - Promotion of FMA's competitive advantages

Mission:

FMA's mission is to help students prepare for careers in the financial industry by providing opportunities for personal and professional growth; and to create and enhance relationships with the business community through student oriented events and community service.

****Recommendations for Improvement on the mission statement:***

- Implementing leadership aspect
- People can use FMA to improve on public speaking
- Professional and personal development through FMA
- Helping students to get on the track for finance related career path
- Finding ways to be recognized and connect with local businesses: Creation of the FMA resume book; Service to the community
- Creation of expectations in order to be recognized as an active FMA member

Goals: Goals to be met before the Spring quarter

- Hold our first meeting during the club promotion week: what will it take to make this happen?
- Have an informational meeting
- Have a table and be prepared for the promotion week
- Come up with specific ways of how to create the value

- Come up with the idea for the second meeting so we can attract prospective FMA members: invite a person from Becker to have CFA exam review

Questions & Ideas:

- Who's going to do the website maintenance?
- Are we going to recreate the constitution?
- Quarterly financial statement preparation
- Fund raising event
- What are the core advantages of joining FMA?
- Hold a meeting that explains thoroughly the benefits of joining FMA (Introductory meeting)
- Creation of visual components: brochures, fliers, t-shirts
- Planning FMA trips
- Discuss the benefits of being part of FMA in one of the meetings