

FPA Silicon Valley

Director of Career Development

Job Description and Expectations

Purpose: To help create and facilitate fun and educational events for our members.

Major responsibilities and events:

- Identify and organize three Firm Tours each year.
 - Focus on three different firms (ensemble RIA, solo RIA with tax practice, broker/dealer firm, etc.)
- Triple Threat Social with CalCPA Peninsula Chapter.
 - Usually held in June.
 - One \$500 sponsor helps defray our costs.
- Cupertino Inn Networking Event.
 - Normally held in July.
 - Contact Director of Sales & Marketing at Cupertino Inn (408) 522-4924
- Help facilitate study group formations (Use Study Group Formation Template)
- Oversee NexGen events and outreach
- Point of Contact for Santa Clara University Behavioral Finance case study presentations (Prof. Shefrin Hersh)
 - Create case study
 - Find 3-4 CFP's to help present the case to the class.
 - Schedule dates each quarter and communicate to the Board.
- UC Santa Cruz Extension Student Forum (Cynthia Riley)
- Come up with any other programs and/or events that you think would benefit our chapter.

Length of term: Two years. Can appoint a Co-Director to help with succession planning, pending approval of the board.

Expectations of board members:

- Attend and participate in meetings on a regular basis, and special events as able.
- Participate on ad-hoc committees as necessary.
- Be alert to community concerns that can be addressed by FPA SV mission, objectives, and programs.
- Help communicate and promote FPA's mission and programs to the community.
- Understand the policies and procedures of FPA SV.