

FPA Silicon Valley

Director of Pro Bono

Job Description and Expectations

Purpose: To improve financial literacy in the community and to help underserved populations by providing free, no strings attached, objective financial planning services.

Major responsibilities and events:

- Manage committee of volunteers to plan and program manage various pro bono events involving 1:1 consulting, seminar presentations, and extended financial planning for individuals & families.
- Manage affiliations with various non-profit organizations.
- Collect & track metrics and report them to the board.
- Maintain documents and presentations.
- Leverage FPA national programs such as Homes For Our Troops
- Act as liaison to FPA National/CFP Board/Foundation pro bono resources

Current Nonprofit Partners

- Numerous county and city libraries in Santa Clara and San Mateo counties
- Habitat For Humanity
- UCSC Extension
- City of San Jose Neighborhood Services

Potential Nonprofit Partners

- Palo Alto School District
- MAITRI
- Ecumenical Hunger Project

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 FPASV mission, objectives, and programs.
- Help communicate and promote FPA's mission and programs to the community.
- Understand the policies and procedures of FPA SV.