

Association of Employee Benefit Planners of New Orleans
Board of Directors Duties

President

1. Call and conduct board meetings to coordinate Association activities.
2. Schedule speakers for dinner meetings and coordinate legislative update.
 - a. Review topic with speakers one month before dinner meeting and remind them to prepare outline and biography.
3. Obtain mementos for speakers and for members with distinguished service to the Association.
4. Conduct membership meetings:
 - a. Announce next meeting date and presentation topic, and make any special announcements.
 - b. Recognize new members and guests.
 - c. Introduce speakers.
5. Solicit new board members.

Vice-President

1. Develop and send out initial membership renewal/topic response form to be returned to Secretary.
2. Work with Secretary and Membership Administrator to maintain current membership list.
3. Print membership directory. (Coordinate with Secretary to prepare and print Membership Directory).
4. Respond to requests for information on membership in the Association.
5. Publicize board members, dinner meeting, dates and topics (e.g. City Business and Times-Picayune).
6. Maintain www.aebpno.com website and post current information.
7. Assist President in finding and scheduling speakers for dinner meeting.

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Secretary

1. Notify board members of upcoming meetings and take minutes.
2. Set up new files for year (general correspondence and dinner meetings) and create letterhead with names of new board members.
3. Prepare and send dinner meeting notice via email to membership 3 weeks before meeting.
4. Maintain dinner meeting file with: meeting notice, membership registration, and speaker outline, handouts and biographical sketch.
5. Receive renewal responses and forward checks to Treasurer. (Prepare membership directory)

Treasurer

1. Collect dues for membership from Secretary and guest fees from Parliamentarian; forward membership applications to Vice-President.
2. Work with Secretary and Membership Administrator to maintain current paid member list.
3. Obtain board approval for authorized signatories, maximum single signature limit, and number of signatures required in excess of limit. Make arrangements with bank or other institution to set up checking and investment accounts and check authorization signature cards.
4. Pay approved bills submitted to the Association.
5. Bring checkbook to dinner meeting to pay restaurant.
6. Prepare and maintain financial statements (assets, receipts and disbursements).
7. Prepare Federal and Louisiana exempt organization filings, if needed.

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Parliamentarian

1. Arrange meetings accommodations (meeting dates, rooms required and menus).
2. Receive and record RSVP responses for meeting attendance – responses are recorded on the membership listing prepared for each meeting by Membership Administrator (Secretary).
3. Inform restaurant (or other facility) of expected attendance.
4. Greet members at meetings
 - a. Provide registration signature list and name tags.
 - b. Collect unpaid member dues and guest fees, and forward proceeds to Treasurer.
 - c. Provide President with list of guests so they can be recognized at the dinner meeting.

Board Members

1. Attend board meetings and dinner meetings.
2. Assist in carrying out Association activities. Solicit new members.

Membership Administrator

1. Prepare renewal, topic response forms and addresses for initial membership renewal.
2. Maintain a current membership listing including addresses, disciplines, meeting attendance and dues payment.
3. Prepare membership listing to be included in annual directory.
4. Prepare email addresses for the Secretary and a registration list for the Parliamentarian 3½ weeks prior to the dinner meeting.