

Estate Planning Council 1st Vice President Duties and Timelines

Commitment: Attending meetings with minimal absences; arrive at 11:15a; Time spent on securing speakers in first part of year. Contact the speakers each month to confirm. Attend board meetings as necessary. Succession into the President role the following year.

Responsibility: Read and be familiar with the organization's bylaws and policies.

Duty: Confirm speakers for the year. Start booking in September of the 2nd VP year for the upcoming year. The January through May programs should be available for posting (by the Council's Secretary) on the website by the November meeting. The September through December meetings should be confirmed and ready for posting by May 1st or earlier. Understand technological capabilities of meeting venue in order to be able to explain to speakers and assist with recommendations on best presentation modality.

When recruiting speakers:

- Ask if they have a topic that will apply to multiple areas of our membership
- Understand and explain our membership areas: attorneys, trust officers, CPAs, CFPs, ChFCs and CLUs
- Emphasize that programs are to be educational as they relate to estate planning. If a speaker wants to promote his/her product/service/agenda/cause/charity, they are welcome to apply to be a sponsor of the meeting.
- Detail the timeline of the day:
 - 11:15a: Arrive and set up AV or place handouts on table;
 - 11:15a – 12p: Network
 - 12p – 12:30p: Eat
 - 12:30p – 1p: Presentation to include Q&A time; can start earlier if speaker needs more time
 - Should not extend past 1 PM, if at all possible

Once a speaker has agreed:

- Gather the following information:
 - Name/Title/Company Name
 - If the speaker (or the speaker's firm) also would like to be the sponsor for the meeting
 - Title of presentation and a 2-3 sentence blurb explaining it
 - Request a picture and bio
 - Do they need a projector and screen? If they are doing a PowerPoint, they will need to bring a laptop or ask us to provide one.
 - Will they be making copies of handouts? (If a count is needed, the Council's Secretary automatically sends the attendance list to all Board members the Friday before the meeting.)
 - What luncheon would they like? (The menu choices are posted online when the program itself is posted. Email their choice to the Secretary before the RSVP deadline. The Secretary will create a complimentary registration.
- Send the information in groupings as shown below to the Council's Secretary for posting on the website or for making arrangements:
 - **Right away, as soon as you know:** month speakers will speak; full formal name of speaker, title, firm (all generally obtainable by you from firm's website if you can't get it from the speaker); tentative topic or title of presentation
 - **As soon as you can, but no less than one month before the program** (so the announcement can give people what they need to know, to want to come and reserve, and to start inviting colleagues): actual topic title; 2-3 sentence summary of the topic; photo (often, obtainable by you on the web at speaker's

website; merely do a screen shot and provide it to the Secretary); short (SHORT!) bio (again, obtainable on speaker's website, which you can edit as necessary)

- **NO LESS THAN 8 DAYS BEFORE the luncheon:** Send registration information to the Secretary re the speaker. If they are bringing guests, we do not pay and the guests should register themselves online. Exception for the December meeting: the following information should be emailed to the Secretary before the RSVP deadline for the representatives of Collaboratory, FSW and FGCU and a student brought from FSW and FGCU who are all EPC's guests: meal choice; any allergies or preferences; A/V requirements: projector (club's or speaker's), computer (speaker's or yours), verification by you of compatibility; whether or not there will be handouts (so you will know to give the speaker a count when you get the preliminary list from the Secretary)
 - One week prior to event: Send bio or speaker's introduction to President

Day of the event:

- Bring a backup copy of the speaker's bio to the event;
- Save the speaker and any guests a seat
- Make sure the speaker is set up and all AV equipment is working
- Serve as host to the speaker

Duty: Present plaque to outgoing President. Order the plaque in October of your 1st VP year. Present it to the President at the December luncheon following election of Officers.

Duty: Substitute for the President should the President not be able to fulfill any or all of their obligations during the year.

Duty: On behalf of the Board, review and coordinate sponsorship applications. Verify if the speaker (or the speaker's firm) would like to be the sponsor. If not, notify the President of the application. If yes, explain the sponsorship opportunity, process and policy; and that once (1) the Board has addressed the application, and the result is approval, and (2) the payment is received, the sponsorship will be posted on the website and all other conditions followed. Notify the Treasurer to be on the alert for the check and to notify the Secretary when the payment is received.