

## Estate Planning Council of Lee County 2<sup>nd</sup> Vice President Duties and Timelines

**Commitment:** Attending meetings with minimal absences; arrive at 11:15am; welcome and get to know members; 1-2 board meetings per year. Start booking speakers/programs in September for the upcoming year. Order name badges for new members and replacements needed. Succession into 1<sup>st</sup> Vice President the following year and President the year after.

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

**Duty:** Name Badges – order and distribute; serve as host

Preparing New Name Badges:

- The secretary will provide names/contact information of new members.
- Contact new members and agree on wording for name badges.
- Order the badges.
- Provide Treasurer with the receipt for reimbursement.
- Distribute the badges at meetings.

Providing name tags for Guests:

- Bring clear plastic holders to meetings & blank inserts for Guests' self-completion.
- Collect name tag holders at end of meeting.

Detail the timeline of the day:

- 11:15a: Arrive and set up new name badges on the reception table only for those attending
- 11:15a – 12p: greet attendees; make a point of getting to know Guests (especially if they are potential new members)
- 12p – 12:30p: Eat
- 1p: Collect nametag holders (and badges if not picked up)

If you cannot attend a meeting:

- Arrange for another board member to help you in advance.

**Duty:** Assist in arranging speakers for the following year

In August/September:

- Start working with the 1<sup>st</sup> VP to arrange January – May programs of the following year. At the latest, these should be in place by the November meeting. If possible, please schedule the entire year as soon as possible so the speakers can be announced by the Council's Secretary when membership dues are announced. This information will be added to the website as soon as you provide it. (See 1<sup>st</sup> Vice President job description.)
- Speakers must be informed of the composition of the Council's membership and 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.

**Duty:** Assist where necessary if a fellow board member is absent.

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