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.

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 at least three areas of our membership
- Understand and explain our membership areas: attorneys, trust officers, CPAs, CFPs, ChFCs and CLUs
- 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
  - 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. (We do not have a clicker to advance the slides.) Tell the Council’s Secretary what will be needed.
  - Will they be making copies of handouts? If yes, what is the latest they need to know the count?
- Send the above information to the Council’s Secretary as soon as possible for posting on the website.

One week prior to event:

- Ask the Council Secretary (Arlene) for head count if needed for handouts prior to the weekend before the meeting, when the Council’s Secretary automatically sends the attendance list to all Board members.
- Confirm speaker attendance and lunch selection. Any allergies or preferences? The menu choices are posted online when the program itself is posted. To see them, pretend to register for the luncheon; just don’t submit the reservation (unless, of course, you are entering your own reservation). The secretary confirms the entire year’s menus when contracting with the Cypress Lake CC.
- Register speaker attendance and lunch selection
- Are they going to bring any guests with them? If so, each one is to pay the non-member rate of $30 upon arrival. Please have them sign up on the website as “pay at the door.”
- Tell the speaker how many people will be attending.
- Confirm if they need AV equipment and tell the Council’s Secretary if different from prior notification.
- Send bio to President so they can introduce the speaker.
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