



## Officer Binders & Duties

Please include the following in your binders. A TOC of how everything is organized. If on the 3<sup>rd</sup> Friday of every month, you make a back-up of your files, please include that. Also, if you've created a file structure, or file box for papers, please include how that will be updated, organized, and maintained. A short paragraph or two explaining each will be perfect. A new officer should be able to pick up your binder, and do the job of that office. As always, if you see mistakes, or want to make changes, please let me know, and I'll update this file.

### President

- Overview of Chapters 16, 17, 19, 20, 24
- NAIC Club Contact
- Agendas, Calendar
- Officer Meetings
- Budget (Petty Cash, etc.)
- By-Laws, Agreement, Missions
- Club Verification
- Cash Flow report
- Back-up disks
- Capital Account Disputes
- Sealed Password
- How to conduct a meeting
- Officer History
- Houston NAIC meeting schedule
- Sister Club(s) liaison

### Vice-President

- Overview of Chapters 1 - 10
- Club library
- Guest Speakers
- Education topics
- Parliamentarian
- Club articles
- Train new members
- Houston NAIC class schedule
- Purchase NAIC tools
- Training manuals
- NAIC 12 letters
- NAIC member chapter outlines

### Secretary / Assistant Secretary

- Attendance
- Ballots
- Correspondence with members
- Forms
- Copies of all signed files
- Meeting Notes
- Violation Notices
- Member Status
- Fee Log
- Member List

### Public Relations

- Activities (banquets, gift exchanges, field trips)
- Awards
- Contests & Tracking (Hot Pick Pot)
- Guest Orientation (3 parts)
- Meeting Venues
- New Member recruitment
- New Member Kit
- Brochure
- Maintains all records on Genxchange.com & Yahoo Groups

### Treasurer / Assistant Treasurer

- Overview of Chapters 18, 21-23
- Club Accounts (Bank, Petty, Broker, Suspense)
- Broker Contact
- Club / Individual valuation statements
- Collects / Tracks fees, payments
- Tax filing
- Tax Preparation
- Purchase stocks
- Treasurer Training & Manual/Checklist

### Portfolio Manager

- Overview of Chapters 11 - 15
- Portfolio Value
- Portfolio Guidelines
- Portfolio Diversification
- Stock Studies (What to study, when to update)
- Assign Stock Shepherds
- Sell Signals
- Buy Signals
- Market Reports