



The President A Week At A Glance

Week 1 (After the meeting)

- ❖ Follow-up with secretary, treasurer, vice-president
 - Check if correspondence, deposits, purchases, fees, guest invitations are complete

Week 2

- ❖ Write assigned proposals for voting
- ❖ Check president binder, by-laws, partnership agreement, and club philosophy for accuracy and completion
- ❖ Look for ways to improve the club
- ❖ Officer 1:1 – Check officer binders for accuracy and improve, 1 officer bi-monthly

Week 3

- ❖ Follow-up with secretary, PR, and portfolio manager
 - Check if notes, web, fees, and portfolio updates are complete
- ❖ Ensure assigned action items are completed or prepare to reassign them at the meeting
- ❖ Update & release agenda based on notes & officer input
- ❖ Release assigned proposals

Week 4 (Week of meeting)

- ❖ Print agenda & proposals
- ❖ Highlight action items to discuss at the meeting
- ❖ Do personal stock work

Yearly

- ❖ Create annual budget with input from treasurer
- ❖ Set Goals for the club – membership, education, etc.
- ❖ Work with PR to set club calendar