

FINANCE CLUB 2022-2023 ROLES AND EXPECTATIONS

Expectations for all executive board members:

- Mandatory attendance at all finance club events. Upon being appointed one of the roles below marks your commitment being a leader and role model for all students.
- You are responsible for your own tasks and assignments. There is no greater way to prepare for the real world than being accountable for completing multiple assignments at once.
- Communication regarding every event is key.
- Be prepared to go above and beyond to ensure that events run as smoothly as possible.

Roles:

1. President
2. Vice President
3. Events Director
4. Marketing Director – Communications
5. Marketing Director – Media & Design
6. Programming & Operations Director

Role Descriptions:

1. President
 - a. Actively source club sponsorship, engagement, and outreach throughout the year
Familiarize yourself with and utilize resources on-campus, leverage personal and professional network, use previous club leadership guidance for sourcing and planning current year events. (Resources list on Resources for team leadership doc)
 - b. Plan and define the quarterly schedule with input from executive board members
Once schedule has been developed, you will be responsible for initial outreach to the guests/employers. Make sure to CC necessary people on emails (usually VP, Reiman events manager, Club events Director)
Events Director will handle all details and communication after initial outreach (confirming that the guest is available for the set date and time) is made.
 - c. Coordinate with Marketing Director – Communications to send out weekly email blasts to club members about upcoming events.
Responsible for ensuring all information is correct, language and design appropriate and so on. Make sure you approve any communication that goes out through other e-board members.
 - d. Start, conclusion, and results of executive board recruitment for the next year (Start 1st week of April)
 - e. Conduct research and outreach regarding the different leadership/diversity programs across bulge-bracket banks. Work with Communications Director to post any and all information for these programs in the Reiman newsletter or weekly email blasts. Aimed at helping develop the Freshmen-Juniors within the club.
 - f. Work with VP for ensuring enough club swag like stickers, mugs, T-shirts are in stock for the year.
 - g. Work with Reiman events manager to make sure budget is clear and affordable for all events being organized.
2. Vice President
 - a. Support President with club sponsorship, engagement, and outreach throughout the year

Familiarize yourself with and utilize resources on-campus, leverage personal and professional network, use previous club leadership guidance for sourcing and planning current year events. (Resources list on Resources for team leadership doc)

- b. Responsible for managing club email [REDACTED] Check regularly and maintain important emails.
 - c. Provide research and experiential insight for each event. When organizing events, suggest ideas, ensure e-board is in coordination, track timeline through putting meeting notes on Teams etc.
 - d. Support President, Events Director, Marketing Directors and Programming Director with additional tasks and support club in their absence
 - e. Responsible for being the point of contact for all e-board members before the event is published and posted and after as well.
 - f. Work with President for ensuring enough club swag like stickers, mugs, T-shirts are in stock for the year.
3. Events Director
- a. Communications with guest speakers
Responsible for handling emails with guests or panelists after President has made the initial outreach. (President starts with confirming if guest is available for event date and time, you will be responsible for sending event information, event updates, COVID protocols, thank you notes after event etc.)
 - b. For event preparations
Work with Reiman Events Manager to handle catering/food/snacks, parking passes, sending COVID related surveys to guests, getting campus access and so on. (Usually, the Reiman Events Manager handles costs, budgets, orders – support him/her as needed)
 - c. Event day-of
Manage student entry (have sign-up sheet ready), COVID protocols like social distancing and masks, assist with tech set-up in event room, keep backup of guest presentation in personal system, be available for other concerns or emergencies.
4. Marketing Director – Communications
- a. In coordination with President, responsible for sending weekly announcements to members. These are the weekly email blasts, send either on Monday or Tuesday of the week to all members from Finance Club email. More instructions given in Resources for team leadership doc. These should be like newsletters cum flyers, attractive, creative, and catchy.
 - b. When required and gotten permission from President, send any job openings, campus wide event information, outside DU professional event information as relevant.
 - c. Assist co-Marketing Director in printing flyers, preparing other marketing materials.
 - d. Point of contact for students regarding information leading up to the event.
 - e. Newsletter – There is a Reiman newsletter that goes out every week on Tuesday to students, staff, and alumni. This is a newsletter designed for events, internships, scholarships and more. As a Communications Director, responsible for sending out any upcoming Finance Club event information to the newsletter contact the week before it should be posted. Details on newsletter contact given in Resources for team leadership doc.
5. Marketing Director – Media & Design
- a. Responsible for designing marketing material for events, printing, and putting around the Daniels building
Design flyers in 2-3 variations for each event (different and creative ideas to send information to Reiman professors, students, outside club members and so on)
Design logos or headers as needed to go for Social Media sites as well
 - b. Manage or develop social media presence.
Includes Instagram and LinkedIn as of now. Coordinate with co-Marketing Director on when posts should be sent out.
Utilize Daniels students' LinkedIn activity to spread awareness about club and its events.
 - c. Assist co-Marketing Director with additional tasks

- d. Feel free to work with Reiman Events Director for remodel of logo and branding of the Finance Club as a long-term project.
- 6. Programming and Operations Director
 - a. Primarily responsible for managing communications of club leadership and managing overall club affairs
 - Schedule e-board meetings for every quarter (sending out Doodle Poll, fixing weekly meeting time, sending calendar invites)
 - Use Club Zoom account to schedule meetings, webinars etc.
 - Create text group chat with all e-board members for instant messaging and emergency communication
 - Ensure that at beginning of the year, all e-board members get added to the Teams Channel and have understood the requirement of checking it often through PC/laptop/phones.
 - b. Maintenance of club resources and documents
 - Ensure previous documents and resources of the club remain in designated folders.
 - Organize documents of all kinds in folders.
 - Maintain or create teams channels/chats as and when needed.
 - All flyers, guest speaker presentations, PDFs should be posted on Teams for everyone's access.
 - c. For the quarterly Finance Forums – tie in Finance Club. Responsibility to get students to attend it, market it to the club and so on. Work with the President and Reiman events manager for other club and department activities.