INVESTMENTS & WEALTH INSTITUTE®

INVESTMENTS & WEALTH REVIEW EDITORIAL ADVISORY BOARD

Thank you for your interest in volunteering with Investments & Wealth Institute. The Institute depends on volunteers to help support and promote its programs and services. The information you provide will be used to match your interests and experience with volunteer positions. Please complete the information below and submit this application and any additional professional or biographical information to Investments & Wealth Institute at membership@i-w.org.

First Name: _____ Last Name: _____

Organization: _____ Title: _____

Phone: _____ Email: _____

Professional Profile Link: _____

I am interested in volunteering for the following committees or task forces: (check all that apply)

- ☐ **Annual Conference Committee**
- ☐ **Awards Committee**
- ☐ **Canadian Advisory Council**
- ☐ **Certification Commission**
- ☐ **Certification Examination Item Writers**
- ☐ **Test Form Review Task Force**
- ☐ **Government Relations Committee**
- ☐ **Institute Ambassador**
- ☐ ***Investments & Wealth Review*** **Editorial Advisory Board**
- ☐ ***Journal of Investment Consulting*** **Editorial Advisory Board**
- ☐ **Media Source Bureau**
- ☐ **Membership Committee**
- ☐ **Professional Review Board (must be nominated)**
- ☐ ***Retirement Management Journal*** **Editorial Advisory Board**
- ☐ **Specialty Conference Committee**
- ☐ **Strategic Retirement Advisory Council**
- ☐ **Wealth Management Committee**
- ☐ **Other Task Forces (as needed)**

Time commitment varies and is dependent upon the discretion of the staff liaison. Descriptions of each committee and task force may be found at https://investmentsandwealth.org/about/volunteer-committees.

Committee Name(s): _____ Year(s): _____

☐ I have served on a non-Institute committee(s) before.

Committee Name(s): _____ Years(s): _____

Committee Purpose(s): _____

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EXPECTATIONS

The Institute operates several types of committees and task forces:

1. Working committees charged with developing conference programs, editorial works, examinations, or policies
2. Advisory committees responsible for generating new ideas and suggestions for improvement
3. Subcommittees of the board of directors
4. Certification Examination Item Writers and Test Form Review Task Forces

Active committees are listed on our web site at https://investmentsandwealth.org/about/volunteer-committees.

Submitting this application does not guarantee a volunteer position with Investments & Wealth Institute. Submissions are accepted throughout the year and maintained on file for when volunteer openings arise. Potential volunteers will be contacted by Institute staff to discuss specific openings when interests and needs appear to be a match.

COMMITMENT

Time commitment varies and is dependent upon the discretion of the staff liaison.

Qualifications— we seek individuals from broad geographical locations, diverse educational backgrounds and areas of practice. To serve on a committee, individuals must maintain active membership in the association. Previous experience serving as a volunteer for the Institute or similar national associations is desirable but not required.

Expectations—Volunteers should be willing to actively contribute to committee work and projects, participate in conference calls, attend in-person meetings, and develop/review documents as necessary. Please review further volunteer expectations below. Select volunteer opportunities may require travel. Travel expenses will be paid for by Investments & Wealth Institute.

All volunteers are expected to:

- Demonstrate knowledge of Investments & Wealth Institute mission, objectives of the committee/task force, programs and services to assist in the evaluation of strengths, weaknesses, needs and other issues.
- Accept projects and assignments as requested.
- Demonstrate an awareness of trends in committee/task force area of focus.
- Demonstrate respect for fellow committee/task force members, other points of view, and member contributions.
- Ask difficult questions as appropriate to further the goals and objectives of the committee/task force.
- Serve the goals and mission of Investments & Wealth Institute rather than outside special interests.
- Avoid any appearance of conflict of interest by disclosing any conflicts of interest in a timely manner and signing a conflict of interest policy.
- Maintain independence and objectivity, behave with a sense of fairness, ethics, and personal integrity in accordance with the Investments & Wealth Institute Code of Professional Responsibility.
- Inform chair/staff member prior to meeting/conference call or other committee events of necessary absences.
- Shall not engage in conversations which may be in violation of federal anti-trust statutes.
- Show up prepared and ready to participate in meetings/conference calls/committee events or other requested activities.
- Maintain confidentiality of committee/task force dialogue and discussions.
- Suggest agenda items as requested/appropriate to committee objectives/purpose.
- Demonstrate respect for staff liaison's participation and support of committee/task force.
- Refrain from providing personal references, discussing staff performance, and engaging in dialogue with staff concerning any personnel or personal issues.
- Avoid any appearance of favorability by refraining from requesting special favors or treatment.

By submitting this application, you agree that you have read and clearly understand the expectations required to meet the standards for volunteering with Investments & Wealth Institute. You agree that the information you provided is accurate and truthful to the best of your knowledge.

Signature: _____ Date: _____