**GREATER BOCA RATON ESTATE PLANNING COUNCIL**

**SPEAKERS BUREAU OFFICER’S**

**DUTIES AND RESPONSIBILITIES**

**Duties:** The committee’s primary objectives are to: 1. Develop venues/ways to promote the Speakers Bureau and the members of the GBREPC in the South Palm Beach & North Broward markets. 2. Meet the estate planning & investments needs of the defined market. 3. Ensure that the GBREPC Speakers Bureau operates in a manner consistent with the goals of the organization.

**June**

Outgoing committee head shall:

• Submit Secretary’s salary (hours worked) to Treasurer on the 15th

• Turn over all files to incoming committee head

• Present any invoices to Treasurer for payment

• Complete final report & submit

Incoming committee head shall:

• Start preparing objectives for coming year

• Review goals & objectives with President

• Attend Board meeting if called

• Prepare 1st draft of Budget

**July**

• Attend Board meeting if called

• Submit Secretary’s salary (hours worked) to Treasurer on the 15th

• Review current committee members & make a list of those you would like to add to the committee

• Review past venues for seminars & forms and begin contacting members for the coming year

•.Purpose to add at least three new venues to the list of venues for the year

• Present any invoices to Treasurer for payment

• Locate & employ part-time individual for new year to support hourly needs of the committee

• Prepare final estimates of a proposed budget for committee

• Coordinate with other committee heads to negotiate S/B participation with their areas

**August**

• Prepare updates to web site & review with President & Technology Committee head

• Choose committee meeting dates & locate & secure site, day, time etc.

• Submit Secretary’s salary (hours worked) to Treasurer on the 15th

**September**

• Attend New Member Cocktail Party

• Invite committee members to 1st meeting & set schedules

• Submit Secretary’s salary (hours worked) to Treasurer on the 15th

**October**

• Summarize the results for the past months for presentation to the board.

• Attend Board Meeting if called & present report

• Preside over committee meeting

• Submit Secretary’s salary (hours worked) to Treasurer on the 15th

**November**

• Coordinate the speakers & events & summarize the results for the past month for presentation to the board.

• Attend Board Meeting if called & present report

• Preside over committee meeting & prepare report

• Submit Secretary’s salary (hours worked) to Treasurer on the 15th

.

**December**

• Submit Secretary’s salary (hours worked) to Treasurer on the 15th

• Enjoy the Holidays!

.

**January**

• Coordinate the speakers & events & summarize the results for the past two months for presentation to the board.

• Preside over committee meeting & prepare report

• Attend Board Meeting if called & present report

• Submit Secretary’s salary (hours worked) to Treasurer on the 15th

.

**February**

• Coordinate the speakers & events & summarize the results for the past month for presentation to the board.

• Preside over committee meeting & prepare report

• Attend Board Meeting if called & present report

• Submit Secretary’s salary (hours worked) to Treasurer on the 15th

.

**March**

• Coordinate the speakers & events & summarize the results for the past month for presentation to the board.

• Preside over committee meeting & prepare report

• Submit Secretary’s salary (hours worked) to Treasurer on the 15th•

. **April**

• Coordinate the speakers & events & summarize the results for the past month for presentation to the board

• Preside over committee meeting & prepare report

• Attend Board Meeting if called & present report

• Submit Secretary’s salary (hours worked) to Treasurer on the 15th

**May**

Outgoing committee head shall:

• Submit Secretary’s salary (hours worked) to Treasurer on the 15th

• Summarize the results YTD & ACT/BUD for presentation at the board.

• Attend Board Meeting if called & present report

• Attend annual EOY event.

• Award & Recognize individuals for performance during year at EOY event

• Meet with incoming committee head to discuss future responsibilities

• Present any invoices to Treasurer for payment

**Additional Notes:**

The Committee typically meets on Tuesday mornings. The

Breakfast meetings are held at 8:00 am at various locations TBA.