CIWM Advisory Board Member By-Laws

Membership Levels

**Full Sustaining Member**

Makes a 5-year annual pledge of $5,000; is renewable

**Junior**

Professional with less than five years of professional experience. Serves 2-year term with the option of becoming a Sustaining Member following the 2-year term. Make a $5,000 pledge over 2 years/$2,500 annual donation

Commitment

Meetings are held quarterly, or four times a year. The meetings include three advisory board meetings and one retreat. Co-chairs will attempt to schedule meetings 12 months in advance. Members must also participate on at least one committee or host one membership activity (see list).

Leadership

The leadership will consist of two co-chairs with alternative appointment (see “**Term, Selection, Role and Responsibilities**”)

Co-Chairs who serve staggered three-year terms

Each program/function will have a chairperson with a term of 36 months and option of one additional term

Examples include:

- LIFEvest
- IFPY
- Community and Professional Programs
- Membership – open
- Endowment
- Schwab Trading and Technology Lab
- Student engagement – open
- Women’s Financial Wellness Initiative
CIWM Advisory Board Member By-Laws (continued)

Leadership

Co-chairs and program/function chairpersons will comprise the Executive Committee
4 additional Executive committee meetings to be held before each regular
meeting
Majority attendance to determine meeting schedule
Past chairs are invited to participate on Executive Committee for one year
following expiration of their term

Meeting Structure and Content

Meeting Structure & Content

- Members should submit agenda items at least one month prior to meeting
- Meeting locations are determined by CIWM directors with concurrence of co-chairs
- Meetings will be scheduled in the later afternoon, followed by a networking reception
- Members are encouraged to attend the networking reception following the meeting

Media Release and Other Promotion

- Members will be featured on the CIWM website, social media and other promotional
  and advertising in support of the Center and mission

Hereby agreed by the Executive Committee, November 6, 2018