



2023 National Board Candidate Application

Qualifications & Requirements:

- 2+ years in the industry preferable.
- Chapter board or other non-profit leadership experience a plus.
- Availability to accept 1-2 year term commencing October 20, 2023.
- Schedule flexibility to accommodate meetings and planned travel.
- Completion of any WIFS local Chapter board commitment prior to the election. (Current WIFS Chapter Leaders cannot serve as National Board Members).
- Compliance with code of ethics policy and conflict of interest disclosure.

Candidate Information:

Name _____

Employer _____

Address _____

City/State/Zip _____

Phone _____

Email _____

Social Media Handles:

Education & Work Experience:

Degrees: _____

Designations: _____

Years in the Industry: _____

Position:

- | | |
|---|---|
| <input type="checkbox"/> Agent, Registered | <input type="checkbox"/> Front Line Manager |
| <input type="checkbox"/> Rep, Financial Advisor | <input type="checkbox"/> Other _____ |
| <input type="checkbox"/> Attorney | |
| <input type="checkbox"/> CPA | |
| <input type="checkbox"/> Corporate Position | |

Skills & Talents: Mark 1-3 the 3 skills you see as your strengths. Mark 4-6 the 3 areas you strive to develop.

- | | | | |
|--------------------|--------------------------|--------------------------|-----------------------|
| ___ Change Leader | ___ Innovator | ___ Project Manager | ___ Strategic Thinker |
| ___ Coach | ___ Marketing Strategist | ___ Public Speaker | ___ Tech Savvy |
| ___ Decision Maker | ___ Number Cruncher | ___ Relationship Builder | ___ Writer |
| ___ Fundraiser | ___ Organizer | ___ Social Media Guru | |

Association Membership: Please list all.

Leadership Experience: Check all that apply

- Board Service
- Chapter Leader
- Chapter President
- Entrepreneur
- Industry Award Recipient
- Mentor
- WIFS National Task Force

Board & Committee Service: Please list boards and committees, within or outside of the industry, which you serve on or have served on. If more space is needed, please add an additional sheet:

| Organization | Role/Title | Date of Service |
|--------------|------------|-----------------|
| <hr/> | | |
| <hr/> | | |

Positions of Interest: Please indicate in order of preference (1, 2, 3) the 3 positions you feel align with your skills and experience. This does not mean that you will obtain one of the positions. The needs of the Association are paramount.

- ___ President - one year term
- ___ Vice President - one year term
- ___ National Treasurer - two-year term
- ___ Secretary - one year term
- ___ Chapter Director - one-year term
- ___ Membership Director - one-year term
- ___ Education Director - one-year term
- ___ Member-at-Large Director - one year term

Statement of Motivation and Vision

Please provide a written statement and/or e-mail a short video to office@wifsnational.org stating what motivated you to submit your candidate application, your passion and vision for WIFS, and how you think your skills and experience will benefit the Association. Please limit your written statement to 500 words, or less and your video to 90 seconds, or less.

Background/Bio

Please provide a copy of your resume, professional bios with your application submission.

References

Please provide a minimum of three references.

Name _____

Email _____

Phone _____

References Continued:

2. Client or Employer

Name _____

Email _____

Phone _____

3. Personal

Name _____

Email _____

Phone _____

Attestation

I attest that all information provided is a true and accurate reflection of myself and my qualifications. I also attest that I have never been part of or have fully disclosed any disciplinary or civil action against myself by a governmental, association or legal body.

Signature _____

(Printed)Name _____

Submit application by June 3, 2023 to

WIFS National Board

136 Everett Road, Albany, NY 12205

Fax: 518.935.9232 | Email: office@wifsnational.org

Thank you for your interest in pursuing a leadership position.