

Road Map to Success – Financial Director / Assistant Financial Director

Year-at-a-glance checklist to help you learn and carry out your chapter leader role

Thank you for choosing to share your time and skills as a Thrivent chapter leader. Here is a checklist of tools and resources designed to help you be successful in your role. You may **also want to review the “All Roles” checklist** for items that apply to all chapter leadership board roles. Remember, chapter leader responsibilities can be shared or overlapped to suit the needs of your own chapter leadership board.

The key to the abbreviation icons **R T CHIP** are listed below. Clicking on an icon or any underlined words in this document will either take you to its online location or directly to the document.

Tools to increase your knowledge of the role and related topics	Tasks to complete as part of your role
<ul style="list-style-type: none"> <input type="checkbox"/> If you are new, view the <i>New Volunteer Leader Orientation</i> webinar on Volunteer Leader Resources . R T <input type="checkbox"/> View the <i>Financial Director/Assistant Financial Director role-specific training</i> webinar on Chapter Leader Roles. R T <input type="checkbox"/> Review Understanding Your Role – Financial Director/Assistant Financial Director R for details about your role. <input type="checkbox"/> Browse the following areas in the Volunteer Leader Resources area of thrivent.com: R <ul style="list-style-type: none"> For Chapter Leaders Forms & Conducting Activities Ask CHIP <input type="checkbox"/> Review the following topics in CHIP: CHIP <ul style="list-style-type: none"> Privacy Policy Thrivent Financial Logo Use and Naming Guidelines Co-hosting activities guidelines & reporting Chapter checking account Operating funds Chapter summary report <input type="checkbox"/> Work through <i>Administration Overview and Requesting Funds and Reporting Activity Results</i>, short, easy-to-complete tutorials. R 	<ul style="list-style-type: none"> <input type="checkbox"/> Register for a user ID and password to access the Chapter Leadership Administration Menu online. See How to Create a My Thrivent Account R for details. <input type="checkbox"/> Print Chapter Calendar. R <input type="checkbox"/> Read the monthly Chapter News e-mails and periodic e-mails from your Community Engagement Team (CET) and Thrivent Financial. R <input type="checkbox"/> At the first chapter meeting, lead the discussion on how the chapter will budget operating funds based on the chapter board’s goals. R Managing and Reporting Chapter Operating Funds. <input type="checkbox"/> Manage the chapter’s operating funds budget; enter the operating funds balance carried over from the previous year and report expenses online. R Managing and Reporting Chapter Operating Funds, CHIP Search “<i>calculate operating funds.</i>” <input type="checkbox"/> Maintain financial records for the leadership board and service teams and report on the chapter’s financial condition for the previous month at each chapter board meeting. <input type="checkbox"/> Verify the operating funds deposit at www.thriventbank.com. CHIP Search “<i>deposit requirements/schedule.</i>” <input type="checkbox"/> Review and verify the year-end financial report (due 1st quarter of following year). R See your <i>Understanding Your Role</i> guide for details. <input type="checkbox"/> Attend local or regional training events provided by your CET team as available.

Key

- R** Resources for members and volunteers.
- T** Computer-based learning modules.
- CHIP** Online chapter reference tool. Click on “Ask CHIP.”

Questions? The Member Connection Center is available to answer your questions.

- Call 800-THRIVENT (800-847-4836) and say “Fraternal” between 7 a.m. and 9 p.m. Central time, Monday—Friday or email fraternal@thrivent.com.