**National Association of
Insurance and Financial Advisors-[Insert Chapter]**

 **Board Manual**Revised: [Insert Date]

**Mission Statement**The mission of the National Association of Insurance and Financial Advisors is “Empowering financial professionals and consumers through world-class advocacy and education.”

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**NAIFA-[Insert Chapter] Board Manual**

Board Roster

Governance

1. Mission/Vision Statement
2. Articles of Incorporation
3. IRS Letter of Determination
4. Bylaws *{Note: Include acknowledgement of receipt of bylaws to sign and return.}*
5. Code of Ethics
6. Policies
7. Strategic Plan

Financial

1. Budget
2. Reimbursement Form

Board Meetings

1. Agenda Template
2. Board/Committee Report Template
3. Minutes *{Note: Include last 6-12 months.}*
4. Parliamentary Procedure

Leadership Positions & Responsibilities

Local and Affiliate Map

Chapter Agreement Compliance Checklist

Calendar of Events

*{Note: Place documents in a share drive or appropriate location, linking the items above by highlighting the appropriate wording above and clicking “Insert -> Link” and then pasting the URL into the address field and clicking “Ok.” When finished, update highlighted sections and delete notes before saving and sending to your Board.}*