



# 2024 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 16, 2024.
- 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.

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**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
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**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](mailto: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 May 15, 2024 to**

**WIFS National Board**

**Email: [office@wifsnational.org](mailto:office@wifsnational.org)**

**Thank you for your interest in pursuing a leadership position.**