February 13th, 2019

HOW TO REDUCE YOUR FIDUCIARY LIABIITY

Presented by *Tommy Stine*

Established
2007

NEW MEMBERS

- Cristian Guzman
- Jamie Garner
- Jennifer Heishman

Board of Directors – 2019

- *President: Harvey Ashworth, SHRM-SCP*
- *President Elect: Jesse Sites, SHRM-CP*
- *Treasurer: Lori Turner, SHRM-CP - "Opening Soon"*
- *Secretary: Lesley Hower, PHR, SHRM-CP*
- *Past President & Certification Chair: Justin Ruble, SPHR, SHRM-SCP*
- *College Relations Chair: Pat Hubbard*
- *Membership & Communications Chair: JiJi Russell, SHRM-CP*
- *Member Liaison: Hanna Kenney, SHRM-CP*
- *Workforce Readiness Chair: Courtney Carroll, SHRM-CP, GCDF*
- *Legislative Chair: Raylea Harvey*
- *Programming Co-Chair: Hadley Ward, PHR, SHRM-CP*
- *Programming Co-Chair: Jessica McIntosh, aPHR*

TREASURER

<u>Position Summary</u>:

Act as financial officer and advisor to chapter board of directors. Maintains the chapter mailbox and distributes mail to the appropriate officer, director, or chair. Send dues notices and other invoices to members. File appropriate forms and information with IRS. Maintain the chapter's membership database to produce a print or online membership roster/directory.

<u>Responsible To</u>:

The members of the chapter and the chapter President.

<u>Requirements</u>:

Must be an SHRM member in good standing for their entire term of office.
Must qualify as a Professional member as define by SHRM by-Law.

<u>Responsibilities</u>:

Fulfill the role of financial officer and advisor.
The treasurer, as an elected officer of the chapter, is a responsible member of the chapter's board of directors and must take part in discussion and action on all business of the chapter.
As financial advisor of the chapter, the treasurer must be in a position to assess the financial implications of proposed actions by the board of directors and inform the committee prior to final decisions being made. Also, the treasurer must observe the financial direction of the chapter, recognize possible financial problems, and bring such problems to the attention of the board of directors for action.
The treasurer shall receive, hold, and safeguard in the capacity of trustee and financial agent, all funds for the chapter.
The treasurer shall disburse such funds only for normal and usual uses unless the chapter's board of directors shall otherwise direct.
Complete annual IRS Form 990-N reporting and annual financial statement reflecting monthly balances with debits and credits for the President.
Participate in the development and implementation of short-term and long-term strategic planning for the chapter.
Obtain monthly lists or applications of new members from the membership and/or hospitality-communications chair(s). Enter the new members into the chapter member database.
Update member contact information in the chapter member database via applications, renewal applications, and communications such as email, newsletter, and meeting announcements.
Send monthly membership database to the public relations chair to update website.
Reconcile membership database with financial records to keep memberships and payment current.
Send annual membership renewal invoices and notifications to members.
Remove members if delinquent in payment of dues.
Communicate with national SHRM regarding membership status changes (new members, non-renewals) if a member if also a national SHRM member.
Represent the chapter in the human resources community.
Attend all monthly membership and board of directors meetings.

Resources Available : online at **<u>https://WWW.SHRM.ORG/VLRC</u>**

Eastern Panhandle Society for Human Resource Management: Chapter # 0715

TREASURER'S REPORT ~ January 2019

Balance from Treasurer's Report as of 12/31/2018				**$16,762.52**
	Income			
		Membership	$ 1,871.26	
		Sponsors	$ 65.00	
		Reimbursement	$ 9.15	
		Total Income	***$ 1,945.41***	
			Subtotal:	**$ 18,707.93**
	Expenses			
		Concordia Consulting	($1,000.00)	
		EPSHRM Breakfast	($572.40)	
		PO Box	($41.00)	
		Total Expenses	***-$1,613.40***	
Balance as of: 1/31/2019				**$17,094.53**

Respectfully Submitted,

Lori Turner, Treasurer

WorkForce Readiness

- Mock Interviews – give back & prepare the next generation
- Deadline to volunteer: March 1st

March 8th	8:00 am – 12:00 noon	Spring Mills High School
March 21st	8:00 am – 12:30 pm	Martinsburg High School
March 22nd	7:30 am – 12:00 noon	Hedgesville High School

We Love our Members

Membership Dues and Communications

- Reminder 2 weeks prior to expiration
- Reminders at meetings
- "Inactive" as of 2 months past due

Renewing Your Membership

- Always complete a form
- Required by National SHRM

February Legislative Updates

- Hospital Price Postings https://www.nytimes.com/2019/01/13/us/politics/hospital-prices-online.html

- More states are jumping on the Paid Family and Medical Leave https://www.nolo.com/legal-encyclopedia/paid-family-leave-benefits

- Annual CMS Medicare Part D Disclosures due 60 days after first day of plan year https://www.cms.gov/Medicare/Prescription-Drug-Coverage/CreditableCoverage/index.html

Third Party Student Registration Form

BlueRidge COMMUNITY AND TECHNICAL COLLEGE

☐Fall ☒Spring Year _2018____ (Non-Financial Aid Eligible)

All areas must be completed for submission. Please type or print clearly. Thank you.

Personal Information

1. Social Security Number or BRCTC Student ID: ____________________

2. Proper Name: ____________ Last ____________ First ____________ Middle Name

3. Previous Name(s) under which you were enrolled: (i.e. maiden, married) ____________

4. Address: ____________________ Mailing Address
____________________ City, State, Zip Code

5. County: ____________ 6. If West Virginia Resident, how long? ____________

7. Home Phone: ( ) ____________ Alternate Phone: ( ) ____________

8. E-mail Address: ____________________

9. Ethnic Group: ☐American Indian or Alaskan ☐Black ☐White ☐Hispanic ☐Asian or Pacific Islander

10. Do you consider yourself non-Hispanic? ☐Yes ☐No

(The Ethnic question is optional. The college asks for this information to allow it to submit statistical data to the federal and state government on a regular basis. Your eligibility will not be impaired if you choose not to answer this question.)

11. Birth Date: ____________ 12. Gender: ☐ Male ☐ Female

13. Are you a US Citizen? ☐Yes ☐No If not, what is your Visa status? ____________

High School / GED (required)

☐ High School or ☐ GED Name of High School: ____________

City: ____________ State: ____________

Graduation Year / GED Year: ____________

Course Registration

CRN	SUBJECT	COURSE#	SECTION	COURSE TITLE	CREDIT HRS	AUDIT
				SHRM Learning System for SHRM-CP and	3	
				SHRM -SCP		
				TOTAL	3	

Organization: Eastern Panhandle SHRM

Interested in a degree at Blue Ridge CTC? ☐No ☐Yes...List Degree interested in: ____________

Signature: ____________ Date: ____________

Third Party Credits are considered college courses and may classify you in school and defer student loan payments unless you notify your loan provider.
Directory information may be released on enrolled students unless the student requests in writing to withhold this information.

13650 Apple Harvest Drive, Martinsburg, WV 25403
(304) 260-4380 - www.blueridgectc.edu

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www.youravon.com/pathubbard

pphubbard@frontiernet.net

Thomas Stine – CFP, AIF, PPC

Director of Financial Planning, Water Street Advisory

Mr. Stine serves as the Director of Financial Planning with Water Street Advisory. In this role, he works with Individuals and families on Financial Life Planning. As the Director of Retirement Plan Services, he advises plan sponsors in adhering to ERISA's rigorous standards and to meet their objective of offering a best practices retirement plan for their employees. Mr. Stine has approximately 18 years of industry experience and multiple certifications, including the Certified Financial Planner® (CFP®) designation; the Accredited Investment Fiduciary® (AIF®) professional designation; and the Professional Plan Consultant™ (PPC™), among others.