



**BETA THETA PI**  
— MEN OF PRINCIPLE —

## Financial Advisor *Position Description*

<b>Title</b>	Financial Adviser
<b>Reports to</b>	Chapter Counselor
<b>Qualifications</b>	<ul style="list-style-type: none"> <li>• Experience creating budgets, collecting funds and long term savings.</li> <li>• Understanding about good spending habits and fiscal responsibility.</li> <li>• Basic knowledge of accounting and financial best practices.</li> <li>• Ability to navigate chapter finances through their website program Billhighway.</li> </ul>
<b>Time Allocation</b>	50% Direct advising of VP of Finance and the chapter. 30% Active participant of Advisor Team. 20% Developing relationships with constituents.
<b>Term of Appointment</b>	Based upon individual availability, but minimum of 2 years.

### Mission, Vision, Values & Priorities of Beta Theta Pi

<b>Mission</b>	To develop men of principle for a principled life.	
<b>Vision</b>	Every member will live Beta Theta Pi's values.	
<b>Core Values</b>	<b>Mutual Assistance</b>	Betas believe that men are mutually obligated to help others in the honorable labors and aspirations of life.
	<b>Intellectual Growth</b>	Betas are devoted to continually cultivating their minds, including high standards of academic achievement.
	<b>Trust:</b>	Betas develop absolute faith and confidence in one another by being true to themselves and others.
	<b>Responsible Conduct</b>	Betas choose to act responsibly, weighing the consequences of their actions on themselves and those around them.
	<b>Integrity</b>	Betas preserve their character by doing what is morally right and demanding the same from their brothers
<b>Strategic Priority Areas</b>	Self-Governance, Education, Recruitment, Volunteers	

## **Impact Statement**

Financial responsibility is vital for the operational success of all chapters. This comes from proper planning and accountability between the leadership of the chapter and its members. Every chapter deals with a large sum of capital and are ill equipped or trained to successfully handle their finances. In order to maintain the high standard of record-keeping, budgeting, and fiscal security, the Financial Advisor is necessary.

The Financial Advisor is crucial to the success of a Beta chapter because he or she is the consistent support network when it comes to a chapter's monetary accomplishment. He or she is coaches the VP of Finance in proper budgeting, dues collection and holding other members of the executive board accountable when it comes to achieving their financial goals. A chapter's success is reliant on the resources that it possesses, one aspect being the monetary dues that are collected.

## **Overall Job Responsibilities**

### **Direct advising of the VP of Finance and the chapter (50%):**

1. Maintain weekly communication with the VP of Finance.
2. Attend at least one chapter meeting a month.

### **Be an active member of the Advisor Team (30%):**

1. Attend all quarterly advisor team meetings.
2. Attend and participate in *Keystone Regional Leadership Conference* in February.
3. Meet with District Chief or Assistant District Chief once a semester.

### **Build relationships with constituents (20%):**

1. Meet with the Leadership Consultant during his visit with the chapter.
2. Build positive rapport with chapter members, volunteers and university staff by attending specified chapter and university programming.

## **Competencies**

<b>Competency</b>	<b>Definition</b>
<b>Planning</b>	Exhibits skills in advance planning, coordinating logistics; pays close attention to details
<b>Foster Collaboration</b>	Works in partnership with others to achieve results
<b>Achieve Results</b>	Demonstrates and creates a sense of urgency and commitment for achieving results
<b>Demonstrate Initiative</b>	Ensures execution of work tasks needed to accomplish organizational goals
<b>Uses Sound Decision Making &amp; Judgment</b>	Effectively and critically examines issues and problems and makes judgments in line with organizational values
<b>Computer Navigation</b>	Able to successfully navigate the chapter's online money management website (Billhighway).
<b>Innovation &amp; Strategic Thinking</b>	Takes risks and challenges the process; considers the long-term implications of daily work through critical thinking and/or assessment
<b>Manage &amp; Develop Others</b>	Contributes to the personal and professional growth of undergraduates
<b>Financial Budgeting</b>	Able to work with money in an organizational perspective