



# CPF is Recruiting

**The California Planning Foundation (CPF) is looking to recruit current APA California members to run for the elected board positions of Treasurer, Webmaster, and several other currently-vacant general CPF board member positions.**

Established in 1970 as a non-profit, charitable corporation with the goal furthering the professional practice of planning in California, CPF's primary mission is to provide scholarships to university students in financial need that are talented, motivated, and have demonstrated academic excellence. If this focus resonates with you, and you are looking for new and fun ways to get involved in the profession while passionately giving back to and making a difference in the lives of current university students in California planning programs – who are our next generation of planning leaders – then we want YOU!

**CPF Treasurer's Role** – Helpful, but not necessary to have a financial planning background, but being accurate is important! This position consists mostly of a record management position, including process payments, recording payments, tracking investments, etc. Taxes are done by an accountant and we retain their services for any bookkeeping questions that come up. While the position is not labor-intensive, you would need to check regularly on CPF investments/banking status, create simple quarterly reports for the board, prepare taxes (which means send our accountant the quicken file, the CPF roster, the bank statements, and our annual investment reports from JPMorgan), and shepherd the payment process for the annual fundraising auction (most of which is automated through our new online auction portal and Square). If you have specific questions or need more information about this position, please email CPF Treasurer **Hing Wong**: [hing@hingwong.info](mailto:hing@hingwong.info).

**CPF Webmaster's Role** – This position consists of regularly updating content on the CPF website and social media accounts, as needed. All CPF directors and officers are responsible for providing content to the webmaster to help keep the website and social media accounts current. If you have specific questions or need more information about this position, please email CPF Webmaster **Alison Spindler**: [adspindler27@gmail.com](mailto:adspindler27@gmail.com).

For questions about the other vacant general CPF board positions, elected terms, our regular meeting schedule, etc., and/or if you are ready to apply, please email all three of these individuals: CPF President **Juan Borrelli**: [juan.borrelli@sanjoseca.gov](mailto:juan.borrelli@sanjoseca.gov); CPF Treasurer **Hing Wong**; and CPF Webmaster **Alison Spindler** your: (1) Letter of Interest/Candidate's Statement, and (2) Resume.

## **CPF 2019 Election Schedule**

**Recruitment and Call for Nominations:** September – October (Now!)

**Nominations Submittal Deadline:** October 21, 2019

**Slate Approval and Election Voting by Email Ballot:** November 4 – December 2, 2019

**Elected Candidates to formally join CPF:** January 2020 at an in-person CPF Board Retreat (Date TBD)

[www.californiaplanningfoundation.org](http://www.californiaplanningfoundation.org)