

Staff Duties

NAIFA-Dallas – Inc.

www.naifadallas.org

**40 E. McDermott Drive
Allen, TX 75002**

Phone: 972-991-2364

Karen True, Executive Vice President

● CUSTOMER SERVICE

- Oversees Daily Operations
- Staffing
- Board Meetings
- Agendas/Minutes
- FAN Magazine – advertising sales/editorial content/proof
- Attends Committee Meetings
- Attends Conventions/Association Leadership Conference
- Accounts Payable/Receivable/Interact with all vendors
- Bank Reconciliations
- Deposits/Deposit Allocation
- Financial Reports, Cash Analysis
- Payroll/Employee Liability Forms
- Budgets
- Yearly and Quarterly Taxes, 990, 990T, 941, W2s, work with CPA on tax preparation
- Continuing Education/forms/processing/filing/Authorized Provider Representative
- Center for Lifelong Learning
- Membership/Reporting
- Manager's Membership Award
- Meeting Planning
- Excel spreadsheets/create and maintain – Race for CE Event & other events
- Website Update – post current information to website
- Email marketing for events on Constant Contact
- Ex-Officio Member of all NAIFA Committees
- Credits:
 - Member, National Strategic Planning Committee (twice), 21st Century Education Task Force, John Healy's Partnership Task Force
 - Previous member, National Associations Committee
 - Previous member, National Membership Committee (twice)
 - Winner of the prestigious C. Carney Smith Award 2002 for outstanding NAIFA national association executive
 - Chair, C. Carney Smith Award Selection Committee, 3 times; on committee 8 years
 - Served on Execs Council 4 years, and as 2001 National Chair for Association Executive Advisory Council, Salt Lake City, UT
 - Re-appointed to AEAC in 2014 for 3 year term; AEAC Chair 2016-2017
 - Co-chair of NAIFA 2020/QME Working Group #3, 2017

ktrue@naifadallas.org

34 Years

Pam Thompson, Executive Assistant

- **CUSTOMER SERVICE**

7 Years

- Telephones (screen calls, assist members)
- Mail Distribution
- Charges credit cards through PayPal
- Withdraws from PayPal & Deposits to Bank
- Database Management
- Excel Spreadsheets/create and maintain
- Mass mailings/Mail merges
- Directory – assimilation/production/mailing
- Meeting Preparation/assist in planning/onsite registrations
- Member Support
- President's Cabinet/billing maintenance
- Office machinery maintenance
- Office supplies
- PowerPoint presentations
- Produces monthly luncheon programs
- Generate reports
- Create invitations and flyers
- Ex-Officio member of all NAIFA committees
- Special Projects as needed

helpdesk@naifadallas.org