Chapter Checklist
Superior Chapter Application

Use this checklist as a guide for chapter activities
Detailed information is provided in the Student Chapter Manual
Completion of this checklist + 10 new members**, meets the requirements for Superior Chapter Designation

How Can I Join?
Click here for the membership application

Honor society eligibility must be verified by your chapter's faculty advisor or other responsible party. Once your eligibility has been verified, he/she will issue you an Honor Society Eligibility Code to apply on-line. If you are not sure of who is the advisor for your chapter, click here to search for your chapter's info.

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August
☐ Hold the first meeting with new officers and Faculty Advisor (see the Student Chapter Manual for details)
☐ Complete the FMA Chapter Information Sheet
☐ Contact FMA International for organizational and promotional materials
☐ Form a committee for the Monthly Chapter Newsletter
☐ Start contacting potential speakers (minimum of 8 speakers per academic year)
☐ Schedule the next meeting – Orientation Meeting (described in detail in the Student Chapter Manual)
☐

September
☐ Promote your chapter – distribute FMA brochures and flyers, visit finance classes, etc.
☐ Hold the Orientation Meeting (include faculty advisor, chapter officers, and alumni members as speakers)
☐ Have students submit membership applications and dues online at the FMA website, www.fma.org
☐ Keep members informed of FMA International upcoming events such as on-line conferences (check the student chapter website for current information)
☐ Start plans for member attendance to the FMA Annual Meeting and/or FMA Finance Leaders’ Conference
☐ Plan a field trip to a financial institution/corporation
☐ Contact potential speakers and set up dates (publish event in upcoming newsletter)
☐ Form a website committee
☐

October
☐ Attend the FMA ANNUAL MEETING (http://www.fma.org/future-conferences)
☐ Look for the FMA E-Newsletter to be published and distributed via email
☐ Continue collecting and/or processing membership applications online
☐

November
☐ Collect resumes from members for a Chapter Resume book
☐ Distribute the Chapter Resume book to corporations/speakers
☐ Hold a fundraiser
☐

December
☐ Hold a formal induction ceremony for new NHS members (banquet)
☐ Collect press releases from fall activities
January
☐ Submit a new FMA Chapter Information Sheet (if changes have been made from the fall semester)
☐ Keep members informed of FMA International upcoming events such as conferences (check the website for current information)
☐ Promote your chapter – distribute brochures and flyers for any new potential members, visit finance classes, etc.
☐ Continue collecting and/or processing membership applications online
☐ Make plans for member attendance at the Finance Leaders’ Conference

February
☐ Submit registrations for the FMA Finance Leaders’ Conference

March
☐ Look for the FMA E-Newsletter to be published and distributed via email
☐ Attend the FMA FINANCE LEADERS’ CONFERENCE

April
☐ Plan a second field trip to a financial institution/corporation
☐ Collect resumes from new members for the Chapter Resume book and distribute
☐ Elect the Outstanding Financial Executive and Professional Honor Society recipient(s)
☐ Elect your chapter’s FMA Collegiate Fellow recipient(s) for the academic year
☐ Remind NHS members about the option to purchase NHS sashes for graduation

May
☐ Elect new Chapter Officers for the upcoming academic year – submit a new FMA Chapter Information Sheet
☐ Hold a formal induction ceremony for new NHS members (banquet)
☐ Collect press releases from spring semester
☐ Gather all required information and prepare a report for the Superior Chapter Designation
☐ Remind officers to pass along information and procedures to new officers for guidance in running the chapter next year
☐ Inform graduating seniors that they can renew their FMA membership as a professional (complimentary*)

*Must provide FMA with updated contact information.

**All applications must be in by the superior application deadline. (Small schools with severe hardships are encouraged to contact FMA.)

**FMA accepts membership applications all year**