Volunteer Position Description

Title    Investment Committee Member

Importance of the position to the Franciscan Renewal Center
This position is vital in providing oversight of all financial matters relevant to the effective management of investment funds.

Responsible to    Chairperson of the Finance Committee

Definition of Duties

• Help select and monitor the performance of managers/consultants who are trusted with the investment of Casa funds
• Recommend changes in responsibilities or replacement of investment managers/consultants
• Meet with investment managers/consultants to review performance results and adherence to strategic allocations, risk parameters, and investment policies
• Periodically monitor the Invest Policy and recommend revisions to the Finance Committee
• Assist the Finance Committee in evaluating the immediate and/or long-term impact of withdrawal of funds from investment accounts
• Consider making on-going personal financial gifts to support the needs of the institution and participate in board supported leadership campaigns (annual pledge – weekly offering, Renewing Lives; end of year; Capital)

Length of Commitment
Two years

Time Required
Flexible, committee meetings required

Qualifications

• Professional background in investment management or accounting helpful
• Passion about asset management and investing
• Diocesan Safe Environment Training

Training Provided

• Orientation to the task
• Safe Environment Training

Evaluation

Mutual evaluation annually