



Board of Directors Nominations Form

Deadline for Submission: March 31, 2021

All AFA Board of Director applicants/nominees, must be a resident of the State of Arizona, a fiduciary licensed and in good standing with the Arizona Supreme Court, and a full member of the Arizona Fiduciaries Association.

If applying for yourself, please complete the entire form below. If you are nominating someone else, please complete the contact information section and use Question #1 to state why you feel the person you are nominating should serve on the AFA Board of Directors.

Name: Theresa Whitfield

Title: Fiduciary

Organization/Company Name: Second Voice Fiduciaries LLC

Address: 17220 N Boswell Blvd #125

Phone: 623-487-9800

Alt Phone/Cell #: _____

E-mail: theresa@secondvoicefid.com

1. In general, why do you wish to be a member of the AFA Board of Directors?

I am nominating Theresa as she possesses the experience as a team member as well as a team leader in her organization. She learned the industry from the ground up and has demonstrated her passion for the industry.

2. Each Director may only have 3 unexcused absences from the Board of Director meetings in any fiscal year. Will you able to regularly attend and actively participate in the monthly AFA Board of Director's meetings and the annual retreat (typically held in May)? Yes No

3. Are you willing and able to participate in the AFA's committees to help further its education, membership, and fiscal viability goals? _____

4. Please check any of the committee(s) on which you would be interested in serving.

Membership

Education/ Conference

Conference Planning

Policy & Procedures

5. Please identify any affiliations, memberships, and accreditations which may also be pertinent for AFA leadership.

6. Are you aware of any conflicts of interest, either personally or professionally, that would not allow you to fully and effectively serve the AFA as a Board member? _____ Yes _____ No

If yes, please explain: _____

As a Director you must become familiar and comply with the AFA Bylaws, the NGA Standards of Practice, and the Arizona Licensed Fiduciary Code of Ethics as stated in ACJA §§7-201 and 7-202. On average a general AFA Board Director should plan on dedicating 2-5 hours a month to fulfill their commitment.

If elected, the undersigned is willing to fulfill the above listed commitments and provide his or hertime, energy, and skills to achieve the mission and purpose of the AFA. By signing below the undersigned hereby confirms he/she is a fiduciary licensed by, and in good standing with, the Arizona Supreme Court and is a current full member of the Arizona Fiduciaries Association.

Jeanne Drabiak, nominating party

03-05-2021

Signature

Date

Arizona Fiduciaries Association (AFA)

c/o The Carlson Group, LLC
8987 E Tanque Verde #309-125
Tucson, AZ 85749
F: 814.286.3953
execdirector@azfid.org
<https://azfid.org>

Questions? Contact Pam Carlson at 520.338.0840