



International Foundation for Retirement Education

P.O. Box 524, Barrington, IL 60011
P: 847-756-7350 F: 847-756-7350
E: info@infre.org W: www.infre.org

InFRE Volunteer Application Form

Thank you for submitting your application to serve as a member of InFRE's Board of Standards and Policy Development (BOS) or standing committee. To review the description of the responsibilities of the BOS and standing committees please go to section VIII of this application or go to Volunteer Opportunities.

In our effort to find qualified volunteers we use a comprehensive selection process. This includes collecting background information and requesting comments on open-ended questions. After initial screening of applications, candidates will be interviewed. All information submitted in the application will remain confidential.

Part I: Background Information

SECTION I: Contact Information

Name: \_\_\_\_\_ Email: \_\_\_\_\_
Business Name: \_\_\_\_\_ Job Title: \_\_\_\_\_
Business Address: \_\_\_\_\_ Date Started with Company: \_\_\_\_\_
Home Address: \_\_\_\_\_
Phone: \_\_\_\_\_
Fax: \_\_\_\_\_

SECTION II: Educational Degrees

Degree: \_\_\_\_\_ Date Received: \_\_\_\_\_ College or Institution: \_\_\_\_\_
Degree: \_\_\_\_\_ Date Received: \_\_\_\_\_ College or Institution: \_\_\_\_\_
Degree: \_\_\_\_\_ Date Received: \_\_\_\_\_ College or Institution: \_\_\_\_\_

SECTION III: Professional Designations

Designation: \_\_\_\_\_ Date Received: \_\_\_\_\_ Granting Organization: \_\_\_\_\_
Designation: \_\_\_\_\_ Date Received: \_\_\_\_\_ Granting Organization: \_\_\_\_\_
Designation: \_\_\_\_\_ Date Received: \_\_\_\_\_ Granting Organization: \_\_\_\_\_

SECTION IV: Licenses Held

Have you ever had a license relinquished or revoked? [ ] Yes [ ] No [ ] N/A If 'yes', please explain in the space below or on an attached sheet.

SECTION V: Previous Volunteer Service

Please list previous InFRE or related professional/association/industry/community volunteer service including positions held if any:

Table with 5 columns: Organization, Service/Position Held, Start Date, End Date, Reference Names and Phone Numbers

## SECTION VI: Background and Qualifications

1. Describe your current professional position:
  
  
  
  
  
  
  
  
  
  
2. Please state briefly your specific or unique qualifications to serve generally and the contributions you hope to make to InFRE and its purposes:

## SECTION VII: Disclosure of Complaints Current and Past

Are you, or have you ever been, under notice as to any complaints by clients or any regulatory agency which have led or may lead to legal or disciplinary actions?

- Currently                       Have Been                       No

If you are currently under notice or you have been in the past, please briefly explain:

## SECTION VIII: Volunteer Opportunities

A term for The Board of Standards and Policy Development is three years. A term for each of the standing committees is one year. Please check all the opportunities below for which you are interested in volunteering.

- The Board of Standards and Policy Development.** The Board of Standards and Policy Development (BOS) purpose is to establish the governing rules and regulations related to the Certified Retirement Counselor® (CRC®) certification program, make determinations regarding eligibility and all essential certification decisions, and provide mediation and interpretations for the program, as needed by staff and other volunteer groups.
- Exam Committee.** With guidance from InFRE's testing agency, the Exam Committee develops the certification exam and monitors its performance. Specifically, the Exam Committee will be responsible for exam form pass point recommendation for all exam forms and exam reporting format to candidates. Committee members may be added on an ad hoc basis as may be required for initial pass point recommendations pertaining to new exam forms.
- Recertification Committee.** The Recertification Committee develops the recertification system and monitors its performance, including quality assurance through audits of certificant applications.
- Practice Analysis Committee.** Under guidance from InFRE's testing agency, the Practice Analysis Committee develops and conducts a study of practicing certificants to identify the tasks necessary and uses the results of the study to make recommendations to InFRE for updating the test content outline.
- Appeals Committee.** The Appeals Committee considers and makes determinations on appeals made by candidates or certificants. Appeals Committee members cannot simultaneously serve on the BOS, Exam Committee or Recertification Committee.
- Disciplinary Committee.** The Disciplinary Committee is responsible for enforcing and administering the disciplinary procedures established by the BOS. Disciplinary Committee members cannot simultaneously serve on the Appeals Committee.

# Volunteer Application Form

## Part II: Open-Ended Questions

### SECTION IX: Open-Ended Questions for Board Director Volunteers

Please respond to the following more comprehensive open-ended questions. Please provide a paragraph on each open-ended question.

1. Please explain why you are interested in serving as a volunteer for InFRE.

2. The BOS meets via conference call at least four times per year and perhaps more as may be necessary. Committees schedule calls as needed and are not generally more than quarterly. Will you be able to commit the necessary time to perform your duties if elected chair?

Yes

No

What time limitations on your service do you foresee over the next three years?

3. Describe your experience and contributions serving on other volunteer or corporate boards.

4. What would be helpful to know about you that our current information does not reflect?

5. Are there any conflicts of interest, current or anticipated, on issues that the BOS should know about in considering your application?

6. The mission of InFRE is to enhance the retirement preparedness of the American worker. How do you feel that you would enhance the mission of InFRE?

**SECTION X: Acknowledgement and Submittal**

I agree that everything on and attached to this form is correct and accurate to the best of my knowledge.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Please feel free to attach your bio/resume to this application. Send all documents to Amy Hayes, Customer Care Manager, by mail to P.O. Box 524, Barrington, IL 60011, by fax to 847-756-7350, or by email to [ahayes@infre.org](mailto:ahayes@infre.org).

We appreciate your interest in serving with InFRE and look forward to reviewing your application.



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