

Investment Committee

Mission

- To periodically review AFTE's finances and make recommendations for present and future investments based on goals set forth by the Board of Directors.

Duties & Responsibilities:

- The Chairperson will maintain a list of AFTE's investment goals.
- On at least an annual basis, usually in the months prior to the business meeting, the Chairperson will request statements from the AFTE Treasurer for all financial assets. After receiving the statements, they will be distributed to the committee members for review.
- Review the financial statements and evaluate the various investments in the context of stated goals. This will include an evaluation of investment performance, volatility, etc.
- Recommend to the Board of Directors changes to investment goals, as needed, based on the financial condition of the Association and/or instructions from the Board of Directors.
- Recommend to the Board of Directors changes to investments and/or investment strategy, as needed, to include changes to investment vehicles, asset allocation, etc. This may be in response to changing goals, market conditions, changing costs, changes to investment vehicles themselves, etc.
- Assist the AFTE Treasurer with the selection of bank accounts, CDs, etc.