**ROLE DESCRIPTION
CHARITIES REPRESENTATIVE**

Every local institute must elect a charities representative at its Annual General Meeting to hold office for the ensuing twelve months.

The Charities Representative role is to promote The Insurance Charities to the local market through communications and fund raising events.

Remember, the role of the local institute is primarily to adopt the objectives of the CII, as defined in its Charter and Bye-laws, for the benefit of your local members, prospective members, students and the local insurance and financial services community.

Consequently, the charities representative should develop a close working relationship with the CII at Aldermanbury and also with the Regional Membership Manager for the region.

**Main responsibilities**

The role will involve, but may not be limited to the following:

* To promote awareness of The Insurance Charities to the local membership and key organisations across the region throughout the presidential year.
* To raise funds for The Insurance Charities at planned fund raising events throughout the presidential year.
* To support The Insurance Charities on Insurance Charities Day through the co-ordination and promotion of the day to the local membership and key organisations across the region.
* Fully brief the president and council on the particular needs of the Insurance Charities and the work it undertakes.
* Liaise with the local institute treasurer with regards the banking of receipts and the transfer of funds to The Insurance Charities, or operate a separate bank facility to account specifically for the charity funds.

**Additional notes**

1. The Insurance Charities has supported many thousands of individuals in the UK and Ireland with vital financial and practical help over the years.
2. For those who cannot finance an essential item due to low income or lack of savings The Insurance Charities can consider help. Such help might be towards a piece of equipment to help someone with reduced mobility, an adaptation to a property which is not financed by local or central government, the replacement of an appliance or some essential property maintenance.
3. Sometimes income is not sufficient to meet essential costs such as therapy or other treatment for a particular condition. Additionally, income may fall say on redundancy or marriage breakdown and essential day-to-day living costs could become a problem. If the problem has resulted from misfortune The Insurance Charities can sometimes help even if the shortfall between income and essential expenditure will exist in more than the short term.
4. Some people are struggling with a health condition or life issue as well as with financial issues. They need support in accessing the practical help which is available and which would make a significant difference to them, The Insurance Charities may be able to help in such situations.
5. More information can be found at [www.theinsurancecharities.org](http://www.theinsurancecharities.org)

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