



## Welcome

Dear Future Council Member,

Thank you for your interest in serving on the Fortera Advisory Council. At Fortera, we believe in people helping people and our Advisory Council exists to bring that belief to life.

By joining, you become part of a group of community leaders and members who share their voices, ideas, and perspectives with our Board of Directors and team. Your input helps shape our services, strengthen our connection to the community, and ensure we remain true to our mission: to be a trusted partner on the journey to financial well-being.

We are excited to learn about you, your experiences, and the strengths you will bring to this role. Together, we can build something lasting for our members and our community

With gratitude,

Linda Medina- Griffy  
Board Chair  
Fortera Credit Union



## About the Advisory Council

### Purpose:

The Advisory Council is made up of community members who:

- Share feedback and ideas to guide Fortera's products and services
- Serve as ambassadors in the community
- Represent the voice of our members to leadership
- Provide a pipeline for future Board leadership

### Who We're Looking For:

We welcome candidates from all walks of life. The most important qualities are:

- A passion for helping people
- Life and career experiences that bring fresh perspectives
- A connection to our communities
- A willingness to learn and grow

### Member Responsibilities:

As a Council member, you will:

- Follow the established attendance standard by participating in monthly Board meetings and the annual Board retreat
  - A position may be declared vacant if you miss three consecutive regular Board meetings or four regular Board meetings within a calendar year
  - Attendance may be in person or through approved remote methods such as tele or video conferencing. Participation through these methods qualifies as meeting attendance
- Schedule any visits to Fortera outside of regularly scheduled Board or Committee meetings through the Board Secretary to be sure someone is available to assist you. We love to see you, but unscheduled drop-ins can unintentionally disrupt daily work
- Take part in community events such as the Annual Meeting, branch openings, or outreach activities
- Share input on new services and member needs
- Join in celebrations and leadership opportunities, including committees when invited
- Participate in orientation and training so you can contribute with confidence
- Maintain confidentiality by signing and honoring Fortera's Non-Disclosure Agreement (NDA) and uphold our ethical standards

Term of Service: Three years

### Member Benefits and Development:

At Fortera, we are committed to investing in the growth of our Advisory Council members and supporting the causes that strengthen our communities

**Professional Development:**

Each year, Council members may attend one approved credit union system conference or educational event. A travel budget is available to cover related expenses, ensuring members have the opportunity to grow their knowledge, expand their leadership skills, and connect with peers across the movement

**Charitable Giving Allowance:**

Council members are also provided with an annual charitable giving allowance of up to \$2,500. This allowance is available for contributions to 501(c)(3) nonprofit organizations that align with Fortera's mission of financial well-being, community development, and service to others.

To ensure donations reflect our shared values and remain consistent with our purpose, contributions must be pre-approved through the Board Secretary.

Approved categories include, but are not limited to:

- Financial literacy and financial empowerment programs
- Youth development and educational institutions, including scholarships and mentoring initiatives
- Housing stability, food security, and community health and wellness organizations
- Servicemember and veteran relief agencies
- Community development and neighborhood improvement programs

Any charitable allowance funds not used by year-end will be directed to the Fortera Foundation to support our Bridge Scholarship Program, which provides educational opportunities for students in our community.

**The Bridge Scholarship Program:**

The Fortera Foundation was founded to help break the cycle of generational poverty by providing support, education, and opportunity to those who need it most. One of its signature efforts is the Bridge Scholarship Program, which partners with Austin Peay State University to support single-parent students working toward a degree. Scholarships have helped students close financial gaps, remain enrolled, and graduate—creating brighter futures for themselves and their families. By directing unused charitable funds to the Bridge Scholarship Program, we ensure that every dollar continues to make a lasting impact.

**Council Etiquette & Engagement:**

Serving on the Advisory Council is an exciting way to connect with Fortera, and we want you to feel supported every step of the way.

- **Scheduling Visits:** Any visits outside of regularly scheduled Board or Committee meetings should be arranged in advance through the Board Secretary. This ensures the right people are available to assist you and that your time is meaningful.
- **Confidentiality:** You will sign Fortera's NDA as part of onboarding. Protecting sensitive information is essential to safeguarding our members and operations.
- **Professionalism:** Treat fellow members, staff, and the community with respect. Honor Fortera's values of integrity, collaboration, and service. Share ideas constructively.



- Communication: Use official Fortera channels when discussing Council work and direct requests through the Board Secretary or your Board liaison. As an ambassador, remember your words and actions reflect Fortera's mission.

**Council Commitments:**

As a Fortera Advisory Council member, I understand that I serve as an ambassador for the Credit Union and a representative of our members. I commit to the following:

- Participate in Board meetings and the annual retreat, following the attendance standard
- Schedule visits outside of regular meetings through the Board Secretary
- Take part in community events and represent Fortera positively
- Provide input and feedback on services and initiatives
- Join in leadership opportunities when invited
- Complete orientation and training to strengthen my knowledge
- Maintain confidentiality and uphold Fortera's NDA and ethical standards
- Demonstrate professionalism and respect in all interactions

**Acknowledgment:**

I have read and understand the commitments expected of me as a Fortera Advisory Council member. I agree to uphold these responsibilities and to serve in alignment with Fortera's mission and values.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

Name (Print): \_\_\_\_\_



## **Advisory Council Application Packet**

Thank you for showing an interest and a desire to serve on our credit union Advisory Council.

To submit your application for an Advisory Council position, please fill out the enclosed documents which includes an Advisory Council application packet. All documents should be returned to our Executive Assistant listed below. In addition to a completed Advisory Council application packet, we ask that you please submit a copy of your resume. Once we have received and reviewed your application packet for completeness, we will then forward the packet to our Board of Directors and Nominating Committee for review. The Board of Directors/Nominating Committee may reach out to you to set up an interview as part of their selection process.

Please send your completed application packet and resume to:

**Email:** [volunteer@forteracu.com](mailto:volunteer@forteracu.com)

**Fax:** 931.431.2103

**Mail:** Fortera Credit Union  
Attention: Starla Stoesser  
Re: Advisory Council  
2050 Lowes Drive  
Clarksville, TN 37040

Please feel free to contact Starla Stoesser, Executive Assistant, directly at 931-431-2103 with any questions or comments you may have regarding the application process.



## Advisory Council Application

### Personal Information

(In addition, a personal resume would be appreciated)

Name: \_\_\_\_\_

Home Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_

Preferred method of contact: [phone] \_\_\_\_\_ [text] \_\_\_\_\_ [email] \_\_\_\_\_

Email Address: \_\_\_\_\_

Employer: \_\_\_\_\_

Job Title/Position: \_\_\_\_\_

Current Job Duties: \_\_\_\_\_

Please indicate the highest level of education you completed:

- ☐ HS Diploma
- ☐ Undergraduate Degree in \_\_\_\_\_
- ☐ Master's Degree in \_\_\_\_\_
- ☐ Other Professional Certifications \_\_\_\_\_

### A Little About You ...

1. How long have you been a Fortera member?
2. Why are you interested in serving as a volunteer?
3. What skills, knowledge or strengths will you bring?
4. List current or past volunteer positions.



5. What recommendations would you make to better serve members?

6. How do you see yourself serving as a volunteer?

**Legal Questions:**

1. Do you have a business relationship with Fortera outside of your membership?

2. Do you hold any position that might pose a conflict of interest?

3. Do you have a business or family relationship with a Fortera officer, director or key employee?

4. Have you ever declared personal bankruptcy? If yes, please provide details.

5. Have you ever been convicted of a felony? If yes, please provide details.

**Signature**

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Signature

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Date



## CREDIT CHECK AUTHORIZATION/DISCLOSURE

I authorize Fortera Credit Union to procure a copy of my credit report once nominated as an Advisory Council Member. I understand that any adverse information found could disqualify me. If adverse information is used, Fortera will provide a copy of the report, a summary of my rights under the Fair Credit Reporting Act, and the source of the report.

Please note: Your Social Security Number will not be collected on this form. It will be requested separately and securely at the time the background check is run.

Name (Please Print: First, MI, Last) \_\_\_\_\_

Address \_\_\_\_\_

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

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