PI KAPPA PHI
JOURNEY

FINANCIAL ADVISOR
FIRST 30 DAYS CHECKLIST

Congratulations on your new role as Financial Advisor! Thank you for your commitment to Pi Kappa Phi and ensuring the success of our collegiate chapters. This list will get you started on the tasks you should complete during your first 30 days in your new role to help set you up for success.

☐ Review the Council of Advisors Overview, specifically your performance expectations

☐ Gather the names and contact information for your Chapter Advisor and Archon

- Go to gateway.pikapp.org and click **Create an Account**
- To access the contact information go to **Member Management → Reports → Council of Advisors & Fraternity/Sorority Life Advisors** and then **Member Management → Reports → Chapter Officers**

☐ Contact your Chapter Advisor

- Set up a time to meet/talk in the next two weeks
- Review your position description and set expectations together
- Ask for an update on the current status of the chapter including successes, challenges and issues
- Collect the contact information for the officer(s) you will be working directly with
- Find out the dates and times for any upcoming Council of Advisors (COA) meetings, and chapter meetings/events so you can make plans to attend

☐ Contact your Treasurer

- Set up a time to meet/talk in the next two weeks
- Review your position description and set expectations together
- Ask for an update on the current status of the chapter including successes, challenges and issues
- Collect a copy of the chapters budget and other relevant financial information
- Set up time and method for regular communication

☐ Visit the Resource Library on the Pi Kappa Phi website and review the additional resources available for your position

☐ Schedule/make plans to participate in the following additional training opportunities:

- **OmegaFi Webinar** – should be completed online within the next 30 days