

# ADA COUNCIL ON MEMBERS INSURANCE AND RETIREMENT PROGRAMS NOMINATION FORM—2021

## ELIGIBILITY REQUIREMENTS (GENERAL):

- All members of councils (and commissions) must be active, life, or retired members in good standing of the American Dental Association.
- Council/commission members may not concurrently serve as a member of another ADA council or commission.
- Any member who previously served a four-year term on the Council on Members Insurance and Retirement Programs is not eligible for reappointment to the Council.
- Members of the Council on Members Insurance and Retirement Programs are eligible to serve up to two (2) terms of three (3) years.
- Members of the Council on Members Insurance and Retirement Programs, during their terms on the Council, shall not serve as an officer, director, employee, agent or consultant of any company or organization that offers products that compete, or may potentially compete, with products, programs and services endorsed by the ADA. Nor shall Council members serve, during their terms on the Council, on the insurance council or committee of a constituent or component dental society or other dental organization, or any subsidiary of a dental organization that offers competing insurance or retirement plan products, programs or services.

## SKILLS BASED SELECTION CRITERIA (Top 4 desired characteristics and credentials for nominees):

- Experience with and knowledge of association group insurance plan offerings is essential; a good understanding of insurance products including but not limited to term and universal life, disability, office overhead expense, health and supplemental medical insurance as well as general familiarity with underwriting concepts and insurance plan financials.
- Experience with and knowledge of retirement savings plan products including but not limited to pension and profit-sharing type 401(k) plans, IRAs and annuities; as well as an understanding of investment performance terminology and fund management services. Familiarity with plan recordkeeping and administrative service platforms is desirable.
- Ability to assimilate and comprehend large quantities of technical insurance and retirement plan subject matter in the form of reports and presentations, process and engage in objective group strategic discussion. Strategic thinking is key to the high level discussions of this council.
- General familiarity and understanding of the principles of insurance and financial risk management to participate in high level strategic discussions and development of educational resources to aid members in minimizing their exposure to risk or future financial loss.

## TIME COMMITMENT:

- Members must be willing to attend two, one-day Council meetings and conference calls as may be required throughout the year. New Members attend an orientation meeting their first year in addition to the council meetings.

## NAME OF NOMINEE:

(Please print if not completing this form electronically.)

Address of Nominee:

Nominee ADA Member Number:

Conflict of Interest Statement Attached:

Nominating Trustee:

District:

Trustee has confirmed nominee is in good standing with their state dental association:

- Yes
- No

**Statement of Qualifications of Nominee:** (Please submit a brief narrative statement of the nominees' qualifications as they relate to the above listed criteria. Note that your statement may be shared with members.)