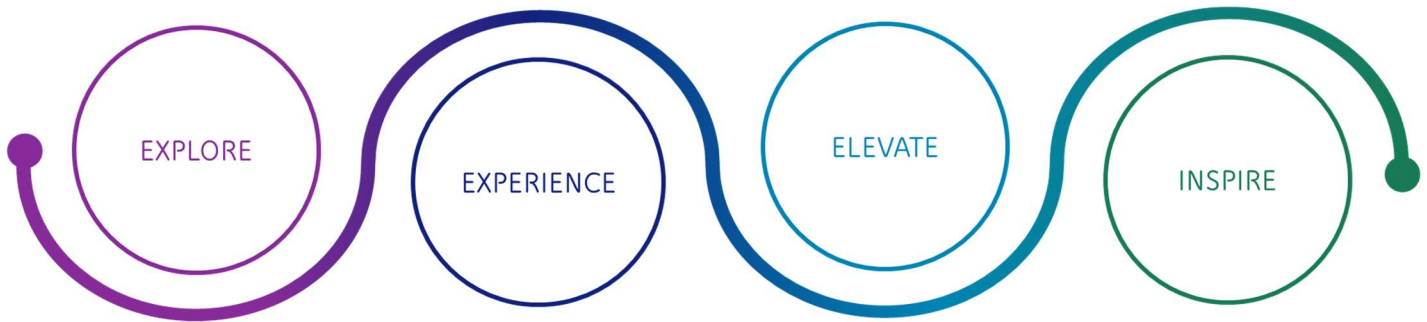


AADMM PATH TO LEADERSHIP



Have you ever wondered what it takes to be an AADMM board member? How AADMM nurtures leadership? How to move the industry forward by *being* the change that you believe is necessary? How to not only grow your business, but also grow professionally?

These are the questions we expect to answer in this Path to Leadership. We want to provide our members with a clear direction and outline the opportunities provided through AADMM to take your career to the next level. To aspire to become a renowned and trusted professional in the daily money management field. From starting as a new member to peaking your career, this path is not intended to be a singular approach, nor does it guarantee your success. It is simply a roadmap to help guide you through the journey to better excel in the industry and take advantage of the many growth opportunities that AADMM provides.

Each stepping stone is designed to prepare you for the next step on your professional journey. As you move from one stepping stone to the next, you will acquire new insights, skills, and working knowledge to help you move to the next phase of your career as an AADMM member and a daily money manager. Each step is spotlighted with a sidebar explaining how to accomplish the step, highlighting the resources AADMM provides, and listing the skills that will be helpful for you in mastering the stepping stone.



During this step, take the time to investigate and absorb as much information as possible.

Value:

- Increase knowledge of the daily money management profession
- Realize the value of your membership
- Navigate AADMM's website quickly and efficiently

Member feedback is consistent in this area. The more you participate, the more you get out of your membership and your DMM career.

Value:

- Create lifelong relationships
- Develop a sense of camaraderie and belonging
- Hone your DMM skills
- Shape your DMM career

Now that you have a clear understanding of the industry and AADMM, it's time to take your career to the next level.

Value:

- Demonstrate your proficiency in the industry
- Show initiative to create the AADMM you and your fellow members envision
- Become an industry expert and share your expertise

You've been successful and an active member of AADMM. Now, use your leadership skills to make an impact and inspire others to promote the industry, serve as a leader, and instill a mindset of serving the organization and the industry. Change and forward momentum only occur when those rare few individuals surface to the top and commit to improve the organization and the industry.

Value:

- Shape the industry
- Mold the organization
- Leave a legacy of service, commitment, and effectual change



EXPLORE

EXPLORE

HOW

Take time to explore what AADMM has to offer its members. There is a wealth of information available to learn more about the DMM industry and AADMM as the industry-leading trade association.

RESOURCES

- The best place to get started is the AADMM website. As an AADMM member, you have access to many tools and resources to enhance your DMM journey. This is where you can learn about the association in greater detail, explore networking opportunities, review educational offerings, and enjoy a great number of member resources. Sample forms, best practices, newsletters, insurance information, and even a marketing toolkit are all designed to help you get up and running quickly and professionally.
- Join AADMM's LinkedIn Group. Search for "American Association of Daily Money Managers" and apply for inclusion in the group.
- Join AADMM's Facebook Group.
www.facebook.com/groups/AADMM/ or search for "American Association of Daily Money Managers (official)"
- DMM Directory. Use the **Find a DMM** directory to see if there are any fellow DMMs in your area with whom you can connect.

SKILLS/COMPETENCIES/TRAITS

- Curiosity
- Initiative
- Basic Computer Skills
- Research
- Synthesize
- Study & Observe
- Goal-Oriented
- Self-Awareness



EXPERIENCE

EXPERIENCE

HOW

Now that you have a better understanding of AADMM and the daily money management profession, take the next step to learn more and experience firsthand the opportunities that AADMM provides.

RESOURCES

- Become a mentee. AADMM provides a mentoring program that provides both mentors and mentees the opportunity to learn and connect with one another.
- Participate in a regional group. AADMM has numerous regional groups/chapters that meet on a regular basis to discuss topics relevant to our industry and our roles as DMMs. No group near you? No worries, AADMM also has a virtual group to meet your needs.
- Attend the conference. Each year, AADMM offers a conference committed to combining learning opportunities, networking, and industry-specific tips.
- Complete webinars. AADMM offers live and recorded webinars on a variety of topics that are important to your profession.
- Join a national committee or task force. AADMM has several committees and task forces created to improve the organization. Your contributions can make a big difference! Do you love to write technical documents? Join the best practices team. Do you love to write free form? Check out the blogs and other forms of writing with the communications committee. Enjoy planning events? The conference committee is calling! These are just a few examples; be sure to visit the website often to stay in the loop on all the committees. To volunteer, send an email to volunteers@aadmm.com.
- Check out AADMM's member forums. Forums are member-generated and participation is open and encouraged by all. The forums are a great way to post your burning questions and connect with other members to see how they are handling certain situations.

SKILLS/COMPETANICES/TRAITS

- Open-Minded
- Communication skills
- Interpersonal skills
- Collaboration
- Active Listening
- Sensitivity
- Inclusiveness
- Relationship Building

ELEVATE

ELEVATE

HOW

At this point, you have solid connections, strong DMM skills under your belt, and a sense of where you want to take your DMM career. AADMM offers many opportunities for you to take your career and your AADMM membership to the next level.

RESOURCES

- Show the world that you are a skilled, experienced, and knowledgeable DMM by obtaining your CDMM certification.
- Share your expertise with your fellow AADMM members. Offer to speak at the conference, host a webinar, or spotlight another learning opportunity to share your knowledge.
- Become a mentor. Growing a relevant, industry-leading professional organization lies in its ability to help others accomplish their goals and master the necessary skills. Reap the rewards of seeing fellow DMMs grow and prosper by simply sharing your time, knowledge, and insights.
- Lead a regional group. In this role, fellow AADMM members look to you for regional leadership, connecting regional knowledge with the support, professionalism, and guidance provided by AADMM.
- Lead a national committee or task force. AADMM is a volunteer-led organization. The initiatives, goals, and overall value of the organization are reflected through the eyes and efforts of our members. It's time to start thinking about giving back, both to AADMM and to your fellow AADMM professionals. We can only remain the industry-leading professional organization if we are willing to help steer AADMM as a beacon of professionalism, integrity, expertise, and relevancy.

SKILLS/COMPETENCIES/TRAITS

- Relationship Building
- Goal-Oriented
- Questioning
- Time Management
- Motivating Others
- Organizational Awareness/Agility
- Embrace Change
- Mentoring
- Adapting
- Facilitates Agreement

INSPIRE

HOW

You have demonstrated a level of commitment not only to your career but to AADMM's success as well. You've experienced firsthand the complexities and rewards of being an involved and engaged AADMM member. For every time you said to yourself "I wish AADMM would..." now is your time!

RESOURCES

- Inspire change by joining the board.
- Inspire others by accepting an officer role on the board.
- Inspire confidence in the profession by embracing the highest professional honor in the daily money management industry, steering the organization to the next phase of relevancy and success. *Being* the change that you so often thought about. Molding not only our organization, but the industry as a whole.

SKILLS/COMPETENCIES/TRAITS

- Group Skills
 - Team orientation. Ability to solve problems through the work of the group and to prioritize group goals over individual priorities.
- Interpersonal Skills
 - Communication. Ability to convey information effectively and to listen to others.
 - Relational. Ability to nurture the development and cohesion of a team by building trusting relationships.
 - Influence. Capacity to have an effect on the behavior and decision making of others.
 - Reputation. Perception others have of the character or capabilities of an individual.
- Personal Leadership Skills
 - Strategic. Ability to analyze issues and to make decisions that set & support the intended direction of the organization.
 - Innovation. Results in the creation of new solutions and fosters new ideas.
- Technical Skills
 - Knowledge of the field and the association. Provides important context to make informed decisions & provide direction for the board.
 - Expertise and experience.
- Personal Attributes
 - Commitment
 - Integrity
 - Capacity

Skills in this section derived from "Building Better Association Boards: Advancing Performance Through Nomination, Recruitment, and Selection Processes" by William Brown and Mark Engle through ase foundation research

INSPIRE