

## **Agenda**

1. Welcome
2. Pledge / Prayer
3. Self-Introductions of those in attendance
4. Explanation of the day
5. Class 1
6. Class 2
7. Comments by GHP or Representative
8. Break
9. Class 3
10. Class 4
11. Comments by MIGM or Representative
12. Break
13. Class 5
14. Overview and questions
15. Comments by GC or Representative
16. Comments by members of General Grand Bodies
17. Closing and Prayer

### **Class 1 - How the Secretary helps and assists in the management of the Body.**

1. Help plan schedule.
2. New members and verification through GLMMS
3. Balloting and insuring degrees are done.
4. Trestle board other notices sent when needed.
5. Friendly reminders and suggestions when needed.
6. Open for questions

### **Class 2 – How the Treasure helps and assist the management of the Body.**

1. Plan a budget make sure Chapter stays within the budget.
2. Accurate Account Balance so Chapter knows its financial status.
3. Receipts accurately received and Bills paid on time.
4. Follows pertaining tax laws and filings.
5. Prepare for yearly audit (financial report form)
6. Open for questions

### **Class 3 – Secretary - The in and out**

1. Membership management – why important and how to retain.
2. Dues, NPD, Remitting of Dues
3. Databases available and how to use and basic information needed.
4. Advantages of using a database.
5. Annual report – Why important and why needed, and how to use it during the year?
6. Why do we need minutes?
7. Insurance what to do if you have a claim.
8. Preparing a replacement. Do you need an assistant?
9. Open for questions

#### **Class 4 – The down and dirty of a Treasurer**

1. Computer Programs Available and how to use and save.
2. Why you need two signatures even if the bank does not require them.
3. No co-mingling of funds with other bodies and why
4. Irs 990 why import to do every year.
5. What if I need an EIN#?
6. Should you have investment accounts?
7. Open for questions

#### **Class 4 - What is available and the future.**

1. Website – what info is there for you.
2. Forms and how to use (annual report, Minute, Petition, Financial)
3. Awards – why important and how to get.
4. Mergers and forfeitures – What you need to know.
5. What's Available by the General Grand Bodies
6. Do you have a Suggestion to better the York Rite?