



2021 Conference Greenville, SC

Welcome to Altrusa District Three

TREASURERS WORKSHOP



TREASURER WORKSHOP AGENDA



- ✓ **Treasurer's Calendar**
- ✓ **General Responsibilities**
- ✓ **Group Tally**
- ✓ **Financial Responsibilities**
- ✓ **Cyber Fraud**
- ✓ **Resources**

Treasurers Calendar



APRIL/MAY

☐ Work with outgoing Treasurer to coordinate dues collection and payments.

JUNE

☐ **June 1:** Dues for the year must be paid.

☐ **June 15:** Deadline for dues submission. Payments not received by this date are subject to \$5 late fee per member.

JULY

☐ **July 10:** All dues must be paid. Unpaid members after this date are dropped from database. Dues after this date are subject to \$10 reinstatement fee.

OCTOBER

☐ Foundation Grants Program month, send in your Club donations.

☐ US Clubs with gross receipts under \$50,000 must file 990N with the IRS and regular 990 with gross receipts over \$50,000.

DECEMBER

☐ **December 1:** International Half-Year (half-price) dues go into effect for new members and remain in effect until March 31 to encourage new members to join.

MARCH

☐ **March 31:** is the last day for International Half-Year Dues.

☐ Half-Year Dues are applied to the current year's membership. New members will be billed the full dues amount for the following year.

APRIL

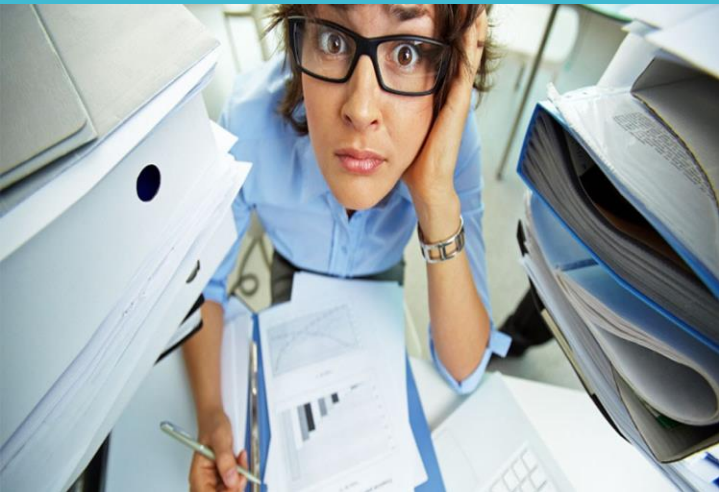
☐ New members paying dues between April 1 and May 31 receive full membership for the remainder of the fiscal year **and the following year**.

☐ Send contribution to Foundation.

☐ Work with incoming Treasurer.

This is in the TREASURERS GUIDE on the International Website

General Responsibilities



MEMBERSHIP RECORDS

- Maintain accurate Club membership records including information on each member's payment status, ID Number, email address, telephone number and primary address, in Group Tally and with the District Treasurer.
- Update Club membership changes (including new members, dropped members or deceased members) monthly in Group Tally and with the District Treasurer.
- Review club records on Group Tally prior to annual dues and make updates.

DISTRICT CLUB MEMBERSHIP SPREADSHEET

Paid	Club	Member #	Last Name	First Name	MI	Full Name	Address	City	State	Zip	Home/Cell Phone	Email	Membership Date	Check	Amount	Date Paid
PD	Raleigh	50723	Claggett	Nancy		Nancy Claggett	1503 Hall Blvd	Garner	NC	27529	(919) 601-4298	nclaggett@att.net	6/13/2015	1169	\$ 20.00	6/3/2019
PD	Raleigh	26960	Dawkins	Henri	T	Henri T Dawkins	501 E Whitaker Mill Rd, Apt 101-A	Raleigh	NC	27608	(919) 833-9375	NO EMAIL ADDRESS	3/31/2015	1169	\$ 20.00	6/3/2019
PD	Raleigh	52937	Clauser	John	W	John W Clauser	1523 Hanover Street	Raleigh	NC	27608	(919) 302-7976	ofgrave@bellsouth.net	6/2/2017	1169	\$ 20.00	6/3/2019
PD	Raleigh	52783	Gray	Frank		Frank Gray	3805 Casey Leigh Lane	Raleigh	NC	27612	(919) 614-3267	fgray@jordanprice.com	6/2/2017	1169	\$ 20.00	6/3/2019
PD	Raleigh	5031	Gray	Jane	P	Jane P Gray	3805 Casey Leigh Lane	Raleigh	NC	27612	(919) 601-4783	judgejanie49@gmail.com	3/31/2015	1169	\$ 20.00	6/3/2019
PD	Raleigh	49063	Hall	Dolores		Dolores Hall	1523 Hanover Street	Raleigh	NC	27608	(919) 832-4999	doloresannhall@gmail.com	6/18/2013	1169	\$ 20.00	6/3/2019
PD	Raleigh	24363	Johnson	Emily		Emily Johnson	309 W Whitaker Mill Road	Raleigh	NC	27608	(919) 839-8101	emilypioh@gmail.com	3/31/2015	1169	\$ 20.00	6/3/2019
PD	Raleigh	14564	Kelly	Donna		Donna Kelly	7504 Mine Valley Road	Raleigh	NC	27615	(919) 906-5098	dkelly005@nc.rr.com	3/31/2015	1169	\$ 20.00	6/3/2019
PD	Raleigh	52200	Scott	Cardel	K	Cardel K Scott	2425 Fields of Broadlands Dr	Raleigh	NC	27604	(919) 274-1789	cscott2911@gmail.com	1/26/2016	1169	\$ 20.00	6/3/2019
PD	Raleigh	5032	Thomas	Phyllis	A	Phyllis A Thomas	1537 Edgeside Ct	Raleigh	NC	27609	(919) 844-6227	thomasral@aol.com	3/31/2015	1169	\$ 20.00	6/3/2019
PD	Raleigh	50783	VanName	Rana		Rana VanName	10024 Sycamore	Raleigh	NC	27613	(919) 870-6013	rana@nc.rr.com	6/13/2015	1169	\$ 20.00	6/3/2019
PD	Raleigh	50653	Williford	JoAnn		JoAnn Williford	1628 Lorraine Road	Raleigh	NC	27607	(919) 608-5001	jawilliford1@gmail.com	6/13/2015	1169	\$ 20.00	6/3/2019
PD	Raleigh	46905	Wyche	Kathleen	B	Kathleen B Wyche	2018 Reaves Drive	Raleigh	NC	27608	(919) 829-3752	kbywyche@att.net	5/30/2011	1169	\$ 20.00	6/3/2019
L	Raleigh	L6663	Hughes	Barbara Ann		Barbara Ann Hughes	4208 Galax Drive	Raleigh	NC	27612	(919) 787-2949	barbaraannahughes1@gmail.com	3/31/2015			
13	Pd/Active	Amt Due:	\$260													
14	All	Amt Pd:	-\$260	Checks:	#1169									Total:	\$260.00	
		Balance:	\$0													
CODE: PD = Paid /PDL = Paid Late /H = Half Year Dues Paid /I7 = Paid as 14-month members																
Deleted Member																
New Member																
Changes (address)																
Under Charter																
Red Font Denotes Treasurer																

GROUP TALLY




MEMBER MANAGEMENT

- To sign into the Group Tally platform for the first time, your email address must be in the system. Once you have obtained the Full Administrative rights, from your Club President or previous Treasurer, sign into Group Tally.
- For more detailed instructions see the Group Tally instructional PDF guides and tutorials, located on the International Website under “Leadership tab”, scroll to “Club Treasurer” and “Group Tally Toolkit”.

Updating Club Officers



Logged in to your Club Page, will be your “Club Name” and “**Current Group Positions**” reflecting your club’s officers. Click on **Members**.

District Three (Admin)  Logout

Lake County, FL
District Three

Summary

Group Information

Members

Payments

Reports

Current Group Positions

Group Admins

President [Julia Allen](#)
First Vice President [Dawn Mainville](#)
Secretary [Donna Marzek](#)
Treasurer [Lori Davis](#)
Immediate Past President [Pat Mueller](#)
Director [Lou Acuff](#)
Director [Linda Tucker](#)
Webmaster [Shannon Schell](#)
Correspondence Secretary [Meg Black](#)

Full Admin [Pat Mueller](#)
Full Admin [Dawn Mainville](#)
Full Admin [Julia Allen](#)
Full Admin [Lori Davis](#)
Admin (View Only) [Traci Gamble](#)

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Click the name from the Group Positions list or by searching the name, click on it, and the member's page will come up. Here you find information on what District and Club the member is a part of, as well as the dates and any leadership positions assigned to them, past and present. Click on the **Add Leadership Position** link.

<div>MembershipPersonal InformationMember InformationContact InformationTransactions</div>			
Group Membership			
Group	Membership	Leadership Position(s)	Administrative Role
District Three		<div>Finance Chair 6/1/15 - 5/6/17 (Past) Edit · Remove</div> <div>District Treasurer 5/6/17 - 5/6/19 (Past) Edit · Remove</div> <div>Governor Elect 5/6/19 - 5/31/21 (Current) Edit · Remove</div> <div>Add Leadership Position</div>	Full Admin Edit
Lake County, FL	Active 5/30/99 - Future (Current)	<div>Treasurer 6/1/07 - 5/31/11 (Past) Edit · Remove</div> <div>First Vice President 6/1/11 - 5/31/12 (Past) Edit · Remove</div> <div>President 6/1/12 - 5/31/14 (Past) Edit · Remove</div> <div>Immediate Past President 6/1/14 - 5/31/15 (Past) Edit · Remove</div> <div>Webmaster 6/1/16 - 5/31/21 (Current) Edit · Remove</div> <div>Treasurer 6/1/19 - 5/31/21 (Current) Edit · Remove</div> <div>Add Leadership Position</div>	Full Admin Edit

THE DIALOGUE BOX WILL APPEAR

Click the **Position drop box** to select a position, and then enter the dates the member will hold that position.

The screenshot shows the 'Create Position' dialog box in the Altrusa District Three (Admin) interface. The dialog box has a title bar with 'Altrusa' on the left and 'District Three (Admin)' on the right. The main content area contains the following fields:

- Position:** A drop-down menu with a red arrow pointing to it.
- Start:** A date field with a calendar icon and the text 'Start Date'.
- End:** A date field with a calendar icon and a 'Clear' button below it.


At the bottom right of the dialog box, there are two buttons: 'Update' (highlighted with a blue arrow) and 'Cancel'.

The background shows a table of leadership positions for Lake County, FL. The table has columns for 'Position', 'Start Date', 'End Date', and 'Member'. The current position is 'Treasurer' (6/1/08 - 5/31/12 (Past)). Below the table, there is a link to 'Add Leadership Position'.

Once you click on [Update](#), your newly assigned position will appear under the Leadership Position(s) heading. If it does not appear instantly, please refresh the page or log out and log back in, please do not repeat the process multiple times.

USE THE **“EDIT”** LINK TO ADJUST ROLES THAT ALREADY EXIST.

If member’s term has no end date, or needs to be adjusted,
use the edit feature instead of removing a position.

<div>MembershipPersonal InformationMember InformationContact InformationTransactions</div>				
Group Membership				
Group	Membership	Leadership Position(s)		Administrative Role
District Three		Finance Chair 6/1/15 - 5/6/17 (Past)		Full Admin Edit
		District Treasurer 5/6/17 - 5/1/19 (Current)		Edit · Remove
		Add Leadership Position		
Lake County, FL	Active 5/30/99 - Future (Current)	Treasurer 6/1/08 - 5/31/12 (Past)	Edit · Remove	Member Edit
		President 6/1/12 - 5/31/14 (Past)	Edit · Remove	
		Webmaster 6/1/16 - Future (Current)	Edit · Remove	
		Add Leadership Position		

We would like past roles to remain listed so there is a record of positions each member has held.

Updating Members



From Members page you can **ADD** a New Member
By clicking on **+New Member**

North Georgia, GA

District Three

[Summary](#) [Group Information](#) [Members](#) [Payments](#) [Reports](#) [Settings](#)

Members

[Download Members \(CSV\)](#) [+ New Member](#)

Search

Filters [\(Clear All\)](#)

Current Member: Current (X)

Display Per Page

10 ▾

Showing 10 / 24 (39 total)

Member	Email	Member Type	Current Member filter ▾
Lou Acuff	lou.acuff@gmail.com	Active	true
Julia Allen	julia@billallen.com	Active	true
Meg Black	megegohary@gmail.com	Active	true

Simply fill in the form...

Apply your club name

The drop-down choices for
Member Type are Active, Affiliate
And Young Professional.

Please don't forget to click
on Add Sponsor and input name

Finish by clicking Create Member

New Member

Group

Club

Member Type

Start



Personal Information

Prefix

First Name

Last Name

Suffix

Preferred Name

Email Address

Phone Number

Address

City/Town

State/Region

Postal Code

Country

Member Information

Sponsors

Add Sponsor

Create Member



Locate existing members to edit by **Search** bar or clicking on their **Name** on the Members page

[Summary](#) [Group Information](#) **Members** [Payments](#) [Reports](#) [Settings](#)

Members



Download Members (CSV)





Search

Filters (Clear All)
Current Member: Current (X)

Display P
10

Showing 10 / 24 (39 total)

Member	Email	Member Type	Current Member  filter 
Lou Acuff	lou.acuff@gmail.com	Active	true
Julia Allen	julia@billallen.com	Active	true
Meg Black	megelgohary@gmail.com	Active	true
Denise Burry	denise65fl@embarqmail.com	Active	true
Laura Byrd	byrdl@lssc.edu	Active	true
Lori Davis	ldavis@insightcreditunion.com	Active	true
Margaret Fuller	pfuller@gate.net	Active	true
Traci Gamble	tracingamble@gmail.com	Active	true
Dinah Henderson	dinahehenderson@centurylink.net	Active	true
Meredith Kirste	mmkirste@earthlink.net	Active	true

  **1** 2 3  

From the members page you can update
Personal Information, **Member** Information, **Contact** Information and see **Transactions**
of Dues and Fees, click **Edit**.

Membership

Personal Information

Member Information

Contact Information

Transactions

Group Membership

Group	Membership	Leadership Position(s)	Administrative Role
District Three		Finance Chair 6/1/15 - 5/6/17 (Past) Edit · Remove District Treasurer 5/6/17 - 5/1/19 (Current) Edit · Remove Add Leadership Position	Full Admin Edit
Lake County, FL	Active 5/30/99 - Future (Current)	Treasurer 6/1/08 - 5/31/12 (Past) Edit · Remove President 6/1/12 - 5/31/14 (Past) Edit · Remove Webmaster 6/1/16 - Future (Current) Edit · Remove Add Leadership Position	Full Admin Edit

Payment Methods

These are the ways to make a payment

Link your bank account and transfer funds directly or link a credit card.

To link an account or credit card, first as Club Treasurer go to **YOUR** member page. Click the **silhouette** in upper right corner of red bar.



Mary Kirley

Member Information

Contact Information


Transactions

You will see a page with your name at the top,
and a few tabs will be available. Choose **Payment Methods** tab.
Then click **“Add Card”** or **“Add Bank Account”**

GroupTally

Altrusa

District Three (Full Admin) ▾



Logout

Mary Kirley

Personal Information


Contact Information


Change Password


Payment Methods

Cards

No Saved Cards.







+ Add New Card

Bank Accounts

No Saved Accounts.

+ Add New Bank Account

On this page, you see payment methods previously entered, or it may be blank. To link a credit card, click on **+ Add New Card**, or **+ Add New Bank Account** to link a bank account. For each option, a dialogue box will appear for you to fill out.

New Card

Card Number

Card Holder's Full Name

Expiration

Month

Year

Security Code (CVC)

Postal Code

Add Card

Cancel

New Bank Account

Account validation is manual and may take 3-4 business days.

Account Holder Type

Individual

Account Holder Name

Routing Number

Account Number

Add Bank Account


Cancel

Making a Payment

The Payments page is divided into four sections. Group Payments, Payments, Group Transactions, and Member Transactions.

If you have a balance, the Make Payment button will be available to you. No Balance, No Button.

Altrusa

District Three (Full Admin)  Logout

North Georgia, GA

District Three

SummaryGroup InformationMembersPaymentsReportsSettings

Make Payment

Group Payments & Transactions

Select Time Period

2020-2021

	Group	Membership	Total
Due	\$30.00	\$1,285.00	\$1,315.00
Paid	\$30.00	\$1,285.00	\$1,315.00
Balance	\$0.00 Due	\$0.00 Due	\$0.00 Due

On payments page you will find a list of dues. Those with **green** check marks have been paid, and **open check boxes** are unpaid and available for selection.

Member Fees & Dues

Select All

Name

Due

Pending

Paid

Status



Anne Carroll
2020-2021 New Member Fee (Altrusa International
District Three Virtual Club)
2020-2021 Membership Dues

\$65.00
\$10.00
\$55.00

\$0.00

\$0.00

Unpaid



Caitlin McCaffrey
2020-2021 Membership Dues

\$55.00
\$55.00

\$0.00

\$0.00

Unpaid



Christina Seifert
2020-2021 New Member Fee (Altrusa International
District Three Virtual Club)
2020-2021 Membership Dues

\$0.00

\$0.00

\$65.00
\$10.00
\$55.00

Paid

Select Members and Items to Pay

Payment Step 1: Select Payment Items

Select Time Period

2020-2021

Payment To Group

Altrusa

Payment Details

Items Selected	0
Total	\$0.00

When Selection is made click Pay Button



Pay

Group Fees & Dues

Select All

	Name	Price	Status
<input type="checkbox"/>	2021 Convention Fee	\$30.00	Unpaid

Member Fees & Dues

Select All

	Name	Due	Pending	Paid	Status
<input type="checkbox"/>	Anne Carroll	\$65.00	\$0.00	\$0.00	Unpaid
	2020-2021 New Member Fee (Altrusa International	\$10.00			
	District Three Virtual Club)	\$55.00			
	2020-2021 Membership Dues				

Once you click pay button, **select** Credit/Debit Card or Bank Account .
Here I have chosen Credit Card so I click on “Pay with Card”

Payment Step 2: Select Payment Method



Credit/Debit Card

Bank Account

Offline



Payment Options

! Please review your selections

	Name	Type	Amount
1	Laura Byrd	Membership	\$37.50
2	Michelle Metheny	Membership	\$37.50
3	Credit/Debit Card Fee	Processing Fee	\$2.55

Select Card

Visa ending in 8150 (Expires 08/2023)
Add New Card

Total

\$ 77.55

\$75.00 paid to Altrusa.

"GroupTally" or "Stripe" may appear on your bank statement. GroupTally & Stripe are the service provider and payment processor.

Pay with Credit/Debit Card

Close

Financial Responsibility

A. Financial Duties

- Plan annual budgets.
- Receive, record and deposit funds in approved Club accounts and maintain records of those accounts.
- Pay all Club bills and dues that have been **AUTHORIZED** by the Board in a timely manner.

B. Dues and Fees

- Familiarize yourself with International and District financial policies and procedures.
- Collect and submit dues to International and District in accordance with deadlines. All must be Postmarked by June 15.



Financial Responsibility



C. Financial Reports and Records

- Report on financial matters at each business meeting, Club Board, Club's annual meeting and on request.
- Submit annual report and Club financial records for audit

D. Members on "Leave of Absence"

Sometimes members are not able to regularly attend meetings. Events in their lives change and their schedules can get overwhelming. Granting a leave of absence is a matter between the member and the Club. Members on leave must still pay their dues to remain Active members.

A.

Financial Duties

Plan Annual Budgets

Our Fiscal year is **June 1st – May 31st**

Develop a budget with Finance Committee, have it approved by Club Board, and present it to club once approved. Ideally all before March 1st. The general operating budget is based both on anticipated income from dues and membership processing fees and on estimated fundraising and donor income.

The general operating budget must provide for the following operating expenses:

- ✓ International Dues
- ✓ Membership processing
- ✓ District Dues
- ✓ International Convention Fees
- ✓ Club Officer/Committee expenses
- ✓ Fixed Operating Expenses (PO Box Rental, Web Site Hosting, etc.)
- ✓ General office supplies and postage
- ✓ Delegates expenses for District Conferences
- ✓ Delegates expenses for International Convention

A SAMPLE BUDGET is shown in the Treasurers Guide



B.

Dues and Fees

Timely Collect and Submit Dues

The Club Treasurer is responsible for invoicing each member at least 1 month in advance for upcoming Dues Renewal and submitting all dues payments and fees (convention fees, district conference fee, reinstatement fees and new member processing fees) to International and District by the June 15 deadline. If payment is not postmarked by the deadline each member of the Club will be subject to a late fee. Club Treasurer is responsible for submitting late fees with late dues to International \$5.00 (\$10.00 after July 10) and District \$2.00 after June 15.

Dues payments are non-refundable. Do NOT advance payments on behalf of members.

We recommend that you do not wait until every member has paid their dues before submitting them because you risk incurring a late fee for every member. Send the payments you have received so that members who paid on time are not penalized.

Club Treasurers are responsible for submitting ALL Dues/Fees



NEW Member Form

Individual Renewal
and Reinstating

Please do NOT
mistake a Reinstating
member for New

ALTRUSA INTERNATIONAL DISTRICT THREE, INC.
2021-2023 DUES & MEMBERSHIP INFORMATION FORM

(PLEASE PRINT)



Altrusa International of _____ Member ID# _____

☐ RENEWING MEMBER ☐ REINSTATING MEMBER ☐ NEW MEMBER ☐ TRANSFERRED MEMBER
☐ ADDRESS CHANGE ☐ DECEASED ☐ AFFILIATE ☐ LEAVE OF ABSENCE

Full Name _____ Birthday _____ (month) _____ (day)

Address _____

City _____ State _____ Zip _____

Home/Cell/Work Phone _____ Email _____

Firm/Corporation/Organization _____ Title/Position _____

Business Address _____ City _____ State _____ Zip _____

Club/Organization Affiliations (positions held) _____

Sponsor Name _____ ID# _____

Co-Sponsor Name _____ ID# _____

MEMBERSHIP DUES INFORMATION:

<input type="checkbox"/> International Dues (Pay online Group Tally)	\$55.00	SEND PMT TO INTERNATIONAL OFFICE
<input type="checkbox"/> Intl Young Professional Dues (Pay online)	\$27.50	SEND PMT TO INTERNATIONAL OFFICE
<input type="checkbox"/> International Processing Fee (All New Members)	\$10.00	SEND PMT TO INTERNATIONAL OFFICE
<input type="checkbox"/> International Half Year Dues (12-1 thru 3-31)	\$27.50	SEND PMT TO INTERNATIONAL OFFICE
<input type="checkbox"/> District New/Renewing/Reinstating Member	\$20.00	\$ _____
<input type="checkbox"/> District Young Professional Dues	\$10.00	\$ _____
<input type="checkbox"/> District Late Fee (Renewals after June 15)	\$ 2.00	\$ _____
<input type="checkbox"/> District Half Year Dues (Received 12-1 thru 3-31)	\$10.00	\$ _____
<input type="checkbox"/> Club Dues	\$ _____	

TOTAL DUE TO CLUB: _____ TOTAL TO DISTRICT \$ _____

Date _____ Date Dues Received by Club _____

Signature of Club Treasurer _____

Daytime Phone Number _____

Email Address _____

TREASURER IMPORTANT: Make Checks for District Three Dues Payable to "Altrusa International District Three, Inc."

Mail District Dues to Altrusa International District Three, Inc. Treasurer: Mary Kiley, 6015 Winter Lane, Dawsonville, GA 30534

Mail International Dues to Altrusa International, Inc. One North LaSalle Street, Suite 1955, Chicago, IL 60602

UPDATED 1-25-2021

CLUB DUES Renewal Form



DISTRICT Annual Dues Submission Form

Altrusa Club of _____ Treasurer _____

Choose the correct category. Complete only the correct category for this situation.

OPTION 1

Annual Dues - District Treasurer must receive your check by 6/15

Number of Members (include a list)	(Fill in number of Members)	0
District Dues \$20.00 each member	X	\$20.00
Total	(Amount Due Auto Calculated)	\$0.00
Number of Members (include a list)	(Fill in number of Members)	0
District Young Professional Dues \$10.00 each member	X	\$10.00
Total	(Amount Due Auto Calculated)	\$0.00
TOTAL		\$0.00

OPTION 2

Late Annual Dues - District Treasurer received after 6/15 but before 7/15

Number of Members (include a list)	(Fill in number of Members)	0
District Dues plus Late Fee \$20.00+\$2.00	X	\$22.00
Total	(Amount Due Auto Calculated)	\$0.00
Number of Members (include a list)	(Fill in number of Members)	0
District Young Professional Dues \$10.00+\$2.00	X	\$12.00
Total	(Amount Due Auto Calculated)	\$0.00
TOTAL		\$0.00

OPTION 3

Reinstatement Annual Dues - DUES PAID after 7/15

Please submit the "District Three Club Membership Form" for each individual reinstated Member.

OPTION 4

New Members - Submitted Immediately after dues are paid to club

Please submit the "District Three Club Membership Form" for each individual New Member.

- Notes:**
1. Dues must be paid before Initiation.
 2. From April 1-June 1, new members pay full amount, but dues cover remainder of current year and the next program year, making April and May free.
 3. Attach list with names and member numbers.

Mail this form with check made out to "Altrusa International District Three, Inc." and the member list to:
District Treasurer Mary Kirley: 6015 Winter Lane, Dawsonville, GA 30534

MEMBER Transfer Form



Altrusa International of _____

Transfer of Membership from One Club to Another

(to be completed by current Club for the receiving Club)

Name _____

Home address _____

Home phone _____ Work phone _____ Cell phone: _____

Would you prefer to be contacted at: _____ Home _____ Work _____ Cell (please check one)

E-mail address _____

New Club: _____ Previous Club: _____

Other club/organization affiliations: _____

Why did you want to join Altrusa?

Birthday ____/____/____ Profession/Occupation _____

How do you want to receive your publications: _____ Hard Copy _____ Electronically

Date Initiated/ _____ Date Transferred: _____

Dues paid: Club Y / N District Y / N International Y / N Member in Good Standing Y/N

THERE IS NO FEE FOR TRANSFER

1. Current Club will complete form as much as possible and forward to the Receiving Club.
2. Receiving Club will complete the form upon acceptance of transferring the member, and then forward the form to the International Office.
3. International Office will move the member in Group Tally and advise the District Treasurer. If the member moves to a different District, both District Treasurers will be advised that that transfer has been completed.

Current Club Treasurer Name

Current Club Treasurer Email

Current Club Treasurer Phone

MEMBER Recommend Form



Altrusa International of _____

Recommendation for Membership

Name _____

Home address _____

Home phone _____ Work phone _____ Cell phone _____

Would you prefer to be contacted at: Home Work Cell (please check one)

E-mail address _____

Other club/organization affiliations:

Why do you want to join Altrusa?

Birthday

Month Day Year

Profession/Occupation _____

How do you want to receive your publications

Hard Copy

Electronically

Sponsor Name _____

Sponsor's ID# _____

Co-Sponsor _____

Co-Sponsor's ID# _____

Date Initiated _____

Membership Committee Area:

Altrusa Board

Approved

Not approved

Date _____

Initial _____

Approved

Not approved

Date _____

Initial _____

C.

Financial Reports

PROVIDE REGULAR MONTHLY REPORTS

Each month reconcile your checking account and generate monthly reports. Report Income and Expenses, include budget status at each business meeting. We recommend QuickBooks. Your reports are easy to compile.

You should provide:

- Balance Sheet – Statement of Financial Position
- Profit & Loss Budget vs Actual
- Profit & Loss Previous Years Comparison (Year to Date)
- Monthly Accounts Receivable
- Monthly Accounts Payable
- Monthly Membership Totals

At end of the year submit an annual report and all Club financial records for club Finance Committee Audit/Review.





75 Million Scam Emails Are Sent Every Day!

CYBER FRAUD

Please be **AWARE** of the existence of cyber fraud

- Be careful when making payments and vigilant regarding not only AUTHORIZING payment but ensuring the RECIPIENT's Identity. We have had incidents where District Treasurers were asked to make a payment by an email from their Governor. It will appear to be the Governor's email address but will be slightly different. Do NOT respond or click on any "links". We recommend you call your Governor to verify payment.
- We are concerned that this fraudulent activity could impact Club Treasurers. Please ensure you do not provide financial information or passwords to anyone via email, as email accounts can be hacked. If unsure about a payment request, we suggest you pick up the phone and talk directly with your Club President. Remember if it seems strange, do some extra verification!

CYBER FRAUD



To protect yourself, we urge you to:

- Periodically change your passwords and **use two factor authentication** whenever possible
- Monitor online banking – report suspicious activity
- Monitor email accounts – if any unusual activity, update anti-virus software
- Be wary of international phone calls of unknown origin
- Be wary of clicking on links and attachments from senders you do not recognize and even some you do
- Do not wire or send funds without **authenticated authorization !!**

Resources



Information on all materials, merchandise (thru Doc Morgan, which is Altrusa's official supplier), IRS Filing, Treasurers Calendar, Dues and Fee Schedules, Group Tally Guides and Videos, any and all contact information for District and International can be found online and requires password protected login.

Altrusa International Website: www.altrusa.org
Altrusa District Three Website: www.districtthree.altrusa.org
District Three Treasurer: districtthreetreasurer@gmail.com

IRS Filings if needed

990 Filing Info: www.irs.gov/instructions/i990/ch01.html



FOR YOUR SERVICE TO ALTRUSA