



**DIVE INTO DUTY**



# TREASURERS WORKSHOP

**2023 DISTRICT THREE CONFERENCE, JACKSONVILLE, FLORIDA**





***Presenter:***



**SCOTT TICE**

**District Three**

**Treasurer, Ocala, FL**



# **NOW THAT YOU ARE TREASURER...**

- **What did I get myself into?**

- **What's next?**

- **What do I have to do?**

- **When do I have to do it?**

- **How can I get help?**



# WORKSHOP AGENDA



- **Treasurers Calendar**
- **Websites And Resources**
- **Group Tally**
- **Financial Responsibilities**
- **Cyber Fraud**
- **Questions and Answers**

# TREASURERS CALENDAR



## APRIL/MAY:

Work with outgoing Treasurer on dues.

**JUNE 1:** Dues for the year must be paid.

**JUNE 15:** Deadline for dues. After subject to \$5 late fee per member.

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

## OCTOBER:

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

**DECEMBER 1:** International Half-Year (half-price) Dues in effect for new members through March 31.

**MARCH 31:** 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**

# SEARCH ALTRUSA INTERNATIONAL AND DISTRICT WEBSITES

Resources can be found  
in multiple places...





# WEBSITE SIGN-IN



## International Website:

[www.altrusa.org](http://www.altrusa.org)

Username: altrusan

Password:

MamieBass1955

Access to all but Group Tally

## District Three Website:

[www.districtthree.altrusa.org](http://www.districtthree.altrusa.org)



# **GROUP TALLY TALK**

**FOR TREASURERS**



# GROUP TALLY

## Member Management



- To sign into Group Tally platform for the first time, your email address must be in the system. Obtain Full Administrative rights from your Club President or previous Treasurer.

- For detailed instructions see Group Tally PDF guides and tutorials, on the International Website under “Leadership tab”, scroll to “Club Treasurer” and “Group Tally Toolkit”.

- **Note:** Dues online procedures can be used for submitting new and renewing members, updating member information and generating dues invoice for your Club. Pay Club Dues online by credit card or pre-arrange to be debited from your Club Checking Account, we recommend you **DO NOT MAIL** Checks.



# GROUP TALLY TOOLKIT

Very IMPORTANT to  
keep your Club Roster  
Updated

## Guides

Download PDF Guides for using Group Tally



How to Login

LEARN MORE



How to update Club officers

LEARN MORE



How to add a payment method

LEARN MORE



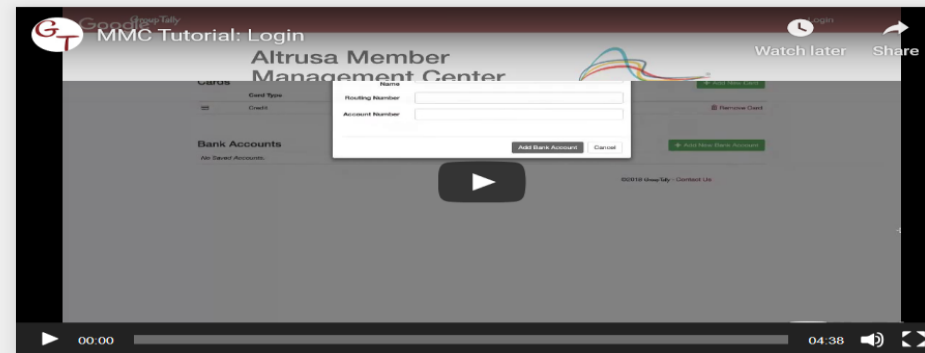
How to make a payment

LEARN MORE

## Videos

Watch video instructions to help you use the Altrusa GroupTally platform

How to Login



AVAILABLE ON INTERNATIONAL WEBSITE UNDER THE LEADERSHIP TAB

To Access Group Tally Click On **SITES TAB**



[MEMBERSHIP](#)

[SERVICE](#)

[COMMUNICATIONS](#)

[LEADERSHIP](#)

[GOVERNANCE](#)

[CONVENTION](#)

[SITES ▾](#)

[LOGOUT](#)

[ALTRUSA HOME](#)

[GROUP TALLY](#)

[FOUNDATION LOGIN](#)

[ASTRA LOGIN](#)

[ALTRUSA STORE](#)

[ALTRUSA SERVICE DATABASE](#)

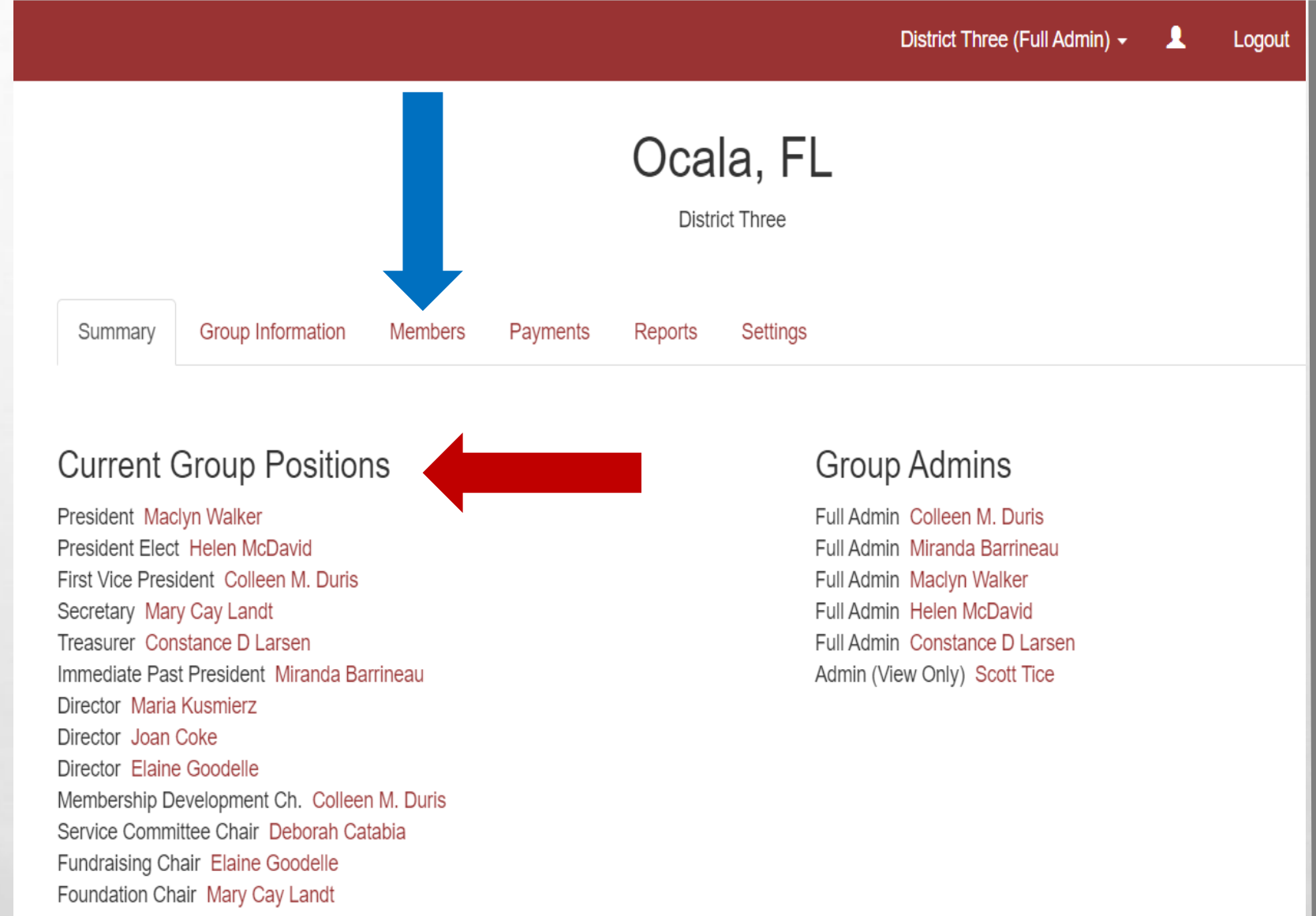


GroupTally



# UPDATING CLUB OFFICERS

Club Home Page is where you update officer and chair information. Can be done from **Group Positions** or **Members** tab.



The screenshot shows the Club Home Page for Ocala, FL, District Three. A large blue arrow points down to the 'Members' tab in the navigation bar. A red arrow points left to the 'Current Group Positions' section.

**Ocala, FL**  
District Three

Summary | Group Information | **Members** | Payments | Reports | Settings

### Current Group Positions

- President [Maclyn Walker](#)
- President Elect [Helen McDavid](#)
- First Vice President [Colleen M. Duris](#)
- Secretary [Mary Cay Landt](#)
- Treasurer [Constance D Larsen](#)
- Immediate Past President [Miranda Barrineau](#)
- Director [Maria Kusmierz](#)
- Director [Joan Coke](#)
- Director [Elaine Goodelle](#)
- Membership Development Ch. [Colleen M. Duris](#)
- Service Committee Chair [Deborah Catabia](#)
- Fundraising Chair [Elaine Goodelle](#)
- Foundation Chair [Mary Cay Landt](#)

### Group Admins

- Full Admin [Colleen M. Duris](#)
- Full Admin [Miranda Barrineau](#)
- Full Admin [Maclyn Walker](#)
- Full Admin [Helen McDavid](#)
- Full Admin [Constance D Larsen](#)
- Admin (View Only) [Scott Tice](#)

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.

Membership

Personal Information

Member Information

Contact Information

Transactions

Group Membership

Group	Membership	Leadership Position(s)	Administrative Role
District Three		<div>Director 4/18/15 - 4/27/16 (Past) <a>Edit</a> · <a>Remove</a></div> <div>First Vice Governor 4/27/16 - 5/6/17 (Past) <a>Edit</a> · <a>Remove</a></div> <div>Communications Chair 5/6/17 - 5/1/19 (Past) <a>Edit</a> · <a>Remove</a></div> <div>ASTRA Chair 5/5/19 - 4/25/21 (Past) <a>Edit</a> · <a>Remove</a></div> <div>District Treasurer 4/25/21 - Future (Current) <a>Edit</a> · <a>Remove</a></div> <div>Add Leadership Position</div>	Full Admin <a>Edit</a>
Ocala, FL	Active 4/30/07 - Future (Current)	<div>Treasurer 6/1/15 - 6/11/20 (Past) <a>Edit</a> · <a>Remove</a></div> <div>Add Leadership Position</div>	Admin (View Only) <a>Edit</a>



# THE DIALOGUE BOX WILL APPEAR

Once you click **UPDATE**, your newly assigned position will appear under the Leadership Position(s) heading.

Click on 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 includes a 'Position' dropdown menu, a 'Start' date field with a calendar icon, and an 'End' date field with a calendar icon and a 'Clear' link. At the bottom right, there are 'Update' and 'Cancel' buttons. A red arrow points to the 'Position' dropdown menu, and a blue arrow points to the 'Update' button. Below the dialog box, a table shows the current leadership positions for Lake County, FL, including Treasurer, President, and Webmaster, with their respective terms and actions (Edit, Remove).

Position	Start Date	End Date	Status	Actions
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

If it does not appear instantly, please refresh page or log out and 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.

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

Member Edit

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



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

# UPDATING MEMBERS



## Ocala, FL

District Three

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

Download Members (CSV)

**+ New Member**

**Members**

**Search**

**Filters** (Clear All)

Current Member: Current (X)

Display Per Page

10 ▼

Showing 10 / 36 (48 total)

Member	Email	Member Type	Current Member ▼ filter▼
Cynthia R. Athey	atheycr@gmail.com	Active	true
Diane P Barrineau	diane@rmbarrineau.com	Active	true
Miranda Barrineau	mlbaltrusa@gmail.com	Active	true

# SIMPLY FILL IN THE FORM...

Apply your club name

The drop-down choices for Member type are Active and Affiliate

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

Finish by clicking **Create Member**

## New Member

### Group

Club

Member Type

Start

3/17/19



### Personal Information

Prefix

First Name

Last Name

Suffix

Preferred Name

Email Address

Phone Number

Address

City/Town

State/Region

Postal Code

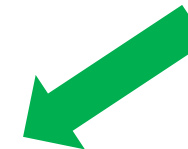
Country

### Member Information

Sponsors

Add Sponsor

Create Member





# LOCATE EXISTING MEMBERS

Edit by **Search Bar** or clicking 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 <span>filter</span>
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

>

»

Personal Information, Member Information, Contact Information and see Transactions of Dues and Fees, click **Edit**

# MAKE UPDATES FROM THE MEMBERS PAGE

Membership

Personal Information

Member Information

Contact Information

Transactions

Group Membership

Group	Membership	Leadership Position(s)	Administrative Role
District Three		<div>Director 4/18/15 - 4/27/16 (Past) Edit · Remove</div> <div>First Vice Governor 4/27/16 - 5/6/17 (Past) Edit · Remove</div> <div>Communications Chair 5/6/17 - 5/1/19 (Past) Edit · Remove</div> <div>ASTRA Chair 5/5/19 - 4/25/21 (Past) Edit · Remove</div> <div>District Treasurer 4/25/21 - Future (Current) Edit · Remove</div> <div>Add Leadership Position</div>	Full Admin Edit
	Ocala, FL	<div>Active 4/30/07 - Future (Current)</div> <div>Treasurer 6/1/15 - 6/11/20 (Past) Edit · Remove</div> <div>Add Leadership Position</div>	Admin (View Only) Edit

**Do NOT delete past roles listed so a record of positions remains intact.**



# PAYMENT METHODS

## There are multiple ways to make a payment

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

Link account or credit card, first as Club Treasurer go to **YOUR** member page, click **silhouette** in upper right corner of red bar.



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**.

The screenshot shows the GroupTally Altrusa user interface. At the top, a dark red header bar contains the GroupTally logo, the name 'Altrusa', and user information: 'District Three (Full Admin)' with a dropdown arrow, a user icon, and a 'Logout' link. Below the header, the user's name 'Scott Tice' is displayed in a large font. Underneath the name are four tabs: 'Personal Information', 'Contact Information', 'Change Password', and 'Payment Methods'. The 'Payment Methods' tab is currently selected and highlighted. Below the tabs, there are two main sections. The first section is titled 'Cards' and contains the text 'No Saved Cards.' To the right of this section is a green button with a white plus icon and the text '+ Add New Card'. A red arrow points from the 'Cards' section towards the 'Payment Methods' tab. The second section is titled 'Bank Accounts' and is partially visible at the bottom. To its right is another green button with a white plus icon and the text '+ Add New Bank Account'. A red arrow points from the 'Bank Accounts' section towards the 'Payment Methods' tab. A third red arrow points from the 'Cards' section towards the '+ Add New Card' button.



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

Ocala, FL

District Three

Summary

Group Information

Members

Payments

Reports


Settings

If Balance Due **CLICK** Payment button

Make Payment

Group Payments & Transactions

Select Time Period

2023-2024 

	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
<input type="checkbox"/>	Anne Carroll 2023-2024 New Member Fee (Altrusa International District Three Virtual Club) 2023-2024 Membership Dues	\$65.00 \$10.00 \$55.00	\$0.00	\$0.00	Unpaid
<input type="checkbox"/>	Caitlin McCaffrey 2023-2024 Membership Dues	\$55.00 \$55.00	\$0.00	\$0.00	Unpaid
<input checked="" type="checkbox"/>	Christina Seifert 2023-2024 New Member Fee (Altrusa International District Three Virtual Club) 2023-2024 Membership Dues	\$0.00	\$0.00	\$65.00 \$10.00 \$55.00	Paid



# SELECT MEMBERS AND ITEMS TO PAY

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

## Payment Step 1: Select Payment Items

Select Time Period

2023-2024

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"/>	2023 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
	2023-2024 New Member Fee (Altrusa International	\$10.00			
	District Three Virtual Club)	\$55.00			
	2023-2024 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**

**TREASURERS DUTIES**





# GENERAL TREASURER 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.

# FINANCIAL RESPONSIBILITY



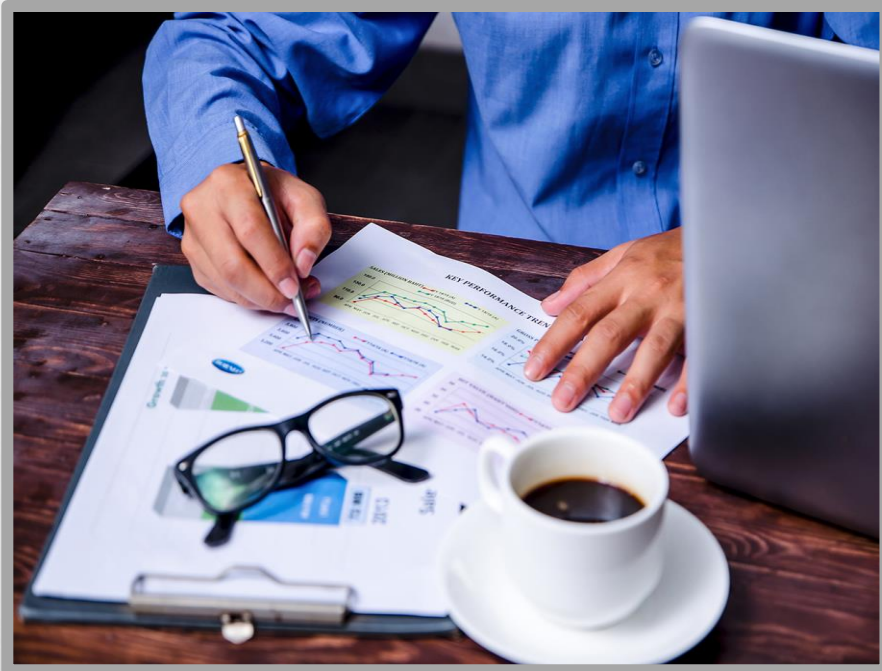
## FINANCIAL DUTIES

- 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.

## DUES AND FEES

- Familiarize yourself with International and District Financial Policies and Procedures.
- Collect and submit dues to International and District by the deadlines. All must be postmarked by June 15.

# DUTIES



## 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.

## MEMBERS ON “LEAVE OF ABSENCE”

- 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 or be subject to a reinstatement fee when their leave is ended.



# BUDGETS



## PLAN ANNUAL BUDGETS

- Our fiscal year is **June 1st – May 31<sup>st</sup>**
- Develop budget with finance committee, approved by club board, presented to club once approved. Ideally all before March 1<sup>st</sup>. The general operating budget is based both on anticipated income from dues and membership processing fees and on estimated fundraising and donor income.

**A SAMPLE BUDGET IS SHOWN IN THE TREASURERS GUIDE**

# BUDGET NEEDS



## 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  
(P.O. Box rental, Web site hosting, etc.)
- ✓ General office supplies and postage
- ✓ Delegates expenses for District Conferences
- ✓ Delegates expenses for International Convention

# 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) District \$2.00 after June 15.
- **Dues payments are non-refundable.** Exercise caution when advancing payments on behalf of members. We do not recommend this option.
- 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.



A young child with brown hair, wearing a light blue button-down shirt, is lying on a white surface. The child is holding a silver coin up to their eye, looking directly at the camera with a curious expression. To the left of the child is a large, pink piggy bank shaped like a pig. The background is a plain, light-colored wall. The text is overlaid in a bold, blue, sans-serif font.

**Worth repeating  
RECEIVE, RECORD  
AND DEPOSIT  
All Funds  
In a Timely Manner**

# NEW MEMBER FORM

Individual Renewal  
and Reinstating

Please do NOT  
mistake a  
Reinstating member  
for New

ALTRUSA INTERNATIONAL DISTRICT THREE, INC.  
2023-2024 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	\$25.00	\$ _____
<input type="checkbox"/> District Young Professional Dues	\$12.50	\$ _____
<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)	\$12.50	\$ _____
<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: Scott Frieser 13212 Providence Green Ct, Charlotte, NC 28277

Pay International Dues to Altrusa International, Inc. on Group Tally

# CLUB DUES RENEWAL FORM

For whole club June  
Dues Renewal, NOT  
for Individuals.  
Blue lines will auto  
calculate totals.



## 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
<b>Total</b>	(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
<b>Total</b>	(Amount Due Auto Calculated)	\$0.00
<b>TOTAL</b>		<b>\$0.00</b>

### 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
<b>Total</b>	(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
<b>Total</b>	(Amount Due Auto Calculated)	\$0.00
<b>TOTAL</b>		<b>\$0.00</b>

### 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 Scott Tice: 7610 SW 63rd Place Road, Ocala, FL 34474



# MEMBER TRANSFER FORM

From one Club to  
another Club



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 RECOMMENDATION FORM

All Treasurer Forms  
located on the  
District Three  
Website under the  
“About Tab”



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 _____

# 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. If using software, like QuickBooks, your reports are easy to compile, or you may track on Excel. With either option accurate details are important.

### 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 annual report and all Club financial records for club Finance Committee Audit



# **CYBER FRAUD**

**PROTECT YOURSELF AND YOUR CLUB**



# CYBER SECURITY STATISTICS:

- The rate of cybercrime increased by 600% during COVID-19
- Cybercrime damages in 2022 was about \$6 trillion worldwide
- Phishing attacks account for 90% of data breaches
- 65% of US organizations fell victim to a phishing attack in 2021



# CYBER FRAUD AND ALTRUSA



- 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, look carefully at the senders email address. Do not respond or click on any "links". We recommend you delete the bogus email.
- 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!



## 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 phone calls of unknown origin
- Be wary of clicking on links and attachments from senders you do not recognize and even some you do
- Never wire or send funds without **authenticated authorization**

## HOW CAN YOU PROTECT AGAINST CYBER FRAUD?



# HOW TO IDENTIFY A PHISH



From: **Shannon Schell** <[fortkb11@gmail.com](mailto:fortkb11@gmail.com)>  
Date: Thu, Jan 13, 2022 at 1:42 PM  
Subject: Re: Hello Scott  
To: <[scottaltrusa@gmail.com](mailto:scottaltrusa@gmail.com)>

Good Day Scott , Need you to do something for me ?

Let me know if you are free.

Shannon Schell

--  
 [Altrusa International](https://www.altrusa.org/)

The scam often relies on impersonation, and phishers can be very good at it. You may get a phishing email that appears to come from a family member, friend or colleague. Altrusa has been a target of these for years now. Pay close attention to the senders email address it does not match the person they are attempting to impersonate.



## WAYS YOUR PHONE CAN BE HACKED



Downloading  
a malicious app



Clicking  
suspicious link



Unsecured  
public Wi-Fi

# PREVENT HACKING

Three of the most common methods of being hacked on your phone or computer, occur when you are downloading, clicking a link or using unsecured public wi-fi.



A wooden signpost with two directional signs. The top sign points right and says 'QUESTIONS'. The bottom sign points left and says 'ANSWERS'. The signpost is made of weathered wood and is set against a bright blue sky with scattered white clouds. The signs are made of light-colored wood with a slightly distressed finish.

**QUESTIONS**

**ANSWERS**

THANK  
YOU

*For Your Service to ALTRUSA*