



# **FS 101 Financial Secretary Skills and Techniques for Success**

May 23, 2022

**Jerry Angus**

Training Director - Utah State Council

Presenter:

**Robert "Bob" Diaz**

Financial Secretary, Council 14239, Riverton

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# Welcome

- Welcome to Financial Secretary Skills and Techniques for Success
- Opening Prayer (Our Father)





# Introduction

- Robert Diaz
  - Financial Secretary
  - St Andrew 14239
- Questions
  - Go ahead and enter in chat
  - I will stop periodically for questions
- Handout





# FS 101 Agenda

- General Information
- Responsibilities
- Calendar View (Summary)





# General Information

- Selected by council and appointed by Supreme
- Bonded for \$5000
- Appointed for 3 years
  - At end of term
    - Evaluation by Grand Knight





# General Information

- Compensation from Supreme
  - Varies, based on insurance certificate registered with your council...
- Waive and choose to donate
  - Send email to Supreme
    - [Financial.Secretary@kofc.org](mailto:Financial.Secretary@kofc.org)





To: [Financial.Secretary@kofc.org](mailto:Financial.Secretary@kofc.org)

Hello

I am Bob Diaz, Financial Secretary for Council 14239 St Andrew Riverton Utah, and I waive my compensation

Thank you,  
Vivet Jesus,

Robert Diaz  
FS Council 14239 St Andrew Riverton UT

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# Responsibilities

- Accounting
  - You collect and receive all monies
  - Pay over monies to Treasurer
  - Use member management/billing
  - Track dues (indebtedness)
  - Track financial/business of council
  - File IRS Form 990
    - 503c status, EIN







# Responsibilities

- Membership
  - Handle member billing
  - Keep role of members (roster)
  - Notify Supreme
    - Elections, Program Service Staff
  - Member transactions
  - Confidentiality!
  - Holder of the official Seal





# Responsibilities

- Best Practice and DEMO
  - I use a spreadsheet in google to track all financial transactions for council
- Use Officers Online
  - Issue Vouchers
  - Use Billing for receipts
  - Assess Dues
  - Dues indebtedness





# Officers Online Demo 1

- Vouchers
  - Process
  - Print
  - Save
- Assessments
- Receipts
- View Member Billing Status





# Officers Online Demo 2

- Print/Download Member Roster
- Report of Officers
- Report Service Program Personnel
  - Safe Environment
  - GK, Program, Family, and Community
  - Status of Safe Environment





# Officers Online Demo 3

- Forms
  - Fraternal Survey (Form & Worksheet)
  - Columbian Award
  - Fraternal Program Report
  - Semi Annual Audit (Feb and Aug)
- Prospects
- Candidates





# Officers Online Demo 3

- IRS 990
  - Due yearly
- Membership Cards
- Supplies
- Member Info
- Affiliate Member Initiative





# Calendar View Summary

- Use the Fraternal Planner
- You will receive 3 planners
  - FS, GK, DKG/Treasurer
- <https://www.kofc.org/un/en/resources/membership/fraternal-leader-success-planner5033.pdf>







# Calendar View Summary

- MAY
  - Council Officer Elections begin
    - Must be held May 1 thru June 15
  - Prepare your Council Columbian Award
- June (all due by 6/30, *target 6/15*)
  - Report of Officers Chosen (185)
  - Report Service Program Personnel (365)
  - Submit Council Columbian Award (SP-7)





# Calendar View Summary

- July
  - Installation of new Officers
  - Prep Council Fraternal Year Budget
  - Review last years activities
  - Prep Semiannual Council Audit (1295)
- Aug
  - Semiannual Audit due by 8/15





# Calendar View Summary

- Sep, Oct, Nov
  - Coats for Kids planning/fund raiser
  - Other programs and activities
  - Use Fraternal Programs Report Form (10784)





# Calendar View Summary

- Dec
  - Send out Fraternal Survey worksheet and prep for the survey
  - Prep for Special Olympics Program report
  - Prep for Dues Assessment
    - Can send First Notice Dec 15
  - Plan on attending the Midyear Meeting





# Calendar View Summary

- Jan
  - Attend mid year meeting
  - If not sent yet, send First Notice
  - Submit Special Olympics Program (10784) Due 1/31
  - Submit Fraternal Survey (1728) Due 1/31
  - Prep Semiannual Council Audit (1295)





# Calendar View Summary

- Feb
  - Semiannual Audit due by 2/15
  - Send Second Notice (30 days after First Notice)
- Mar, Apr
  - Send Knights Alert Letter (30 days after Second Notice)
  - Other programs and activities
  - Use Fraternal Programs Report Form (10784)





# Questions

- Contact Info
- Robert Diaz
- Financial Secretary
  - Saint Andrew Council #14239
  - Riverton, UT
- [bobdiaz79@gmail.com](mailto:bobdiaz79@gmail.com)
- (208) 685-9726







# Next Webinar

TBD

[www.UtahKnights.org/training/](http://www.UtahKnights.org/training/)

No webinar is scheduled for  
June 2022.





# Prayer for the Canonization of Blessed Michael McGivney

**GOD, OUR FATHER, PROTECTOR OF  
THE POOR AND DEFENDER OF THE  
WIDOW AND ORPHAN, YOU CALLED  
YOUR PRIEST, BLESSED MICHAEL  
MCGIVNEY, TO BE AN APOSTLE OF  
CHRISTIAN FAMILY LIFE AND TO LEAD  
THE YOUNG TO THE GENEROUS  
SERVICE OF THEIR NEIGHBOR.  
THROUGH THE EXAMPLE OF HIS LIFE  
AND VIRTUE MAY WE FOLLOW YOUR  
SON, JESUS CHRIST, MORE CLOSELY,  
FULFILLING HIS COMMANDMENT OF  
CHARITY AND BUILDING UP HIS BODY  
WHICH IS THE CHURCH.**



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# Prayer for the Canonization of Blessed Michael McGivney

LET THE INSPIRATION OF YOUR  
SERVANT PROMPT US TO GREATER  
CONFIDENCE IN YOUR LOVE SO THAT  
WE MAY CONTINUE HIS WORK OF  
CARING FOR THE NEEDY AND THE  
OUTCAST. WE HUMBLY ASK THAT YOU  
GLORIFY BLESSED MICHAEL  
MCGIVNEY ON EARTH ACCORDING TO  
THE DESIGN OF YOUR HOLY WILL.  
THROUGH HIS INTERCESSION, GRANT  
THE FAVOR I NOW PRESENT (HERE  
MAKE YOUR REQUEST). THROUGH  
CHRIST OUR LORD. AMEN.



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**FATHER MCGIVNEY,  
PRAY FOR US.**

**VIVAT JESUS!**

**[WWW.KOFC.ORG/BEATIFICATION](http://WWW.KOFC.ORG/BEATIFICATION)**



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