



FS 101 Financial Secretary Skills and Techniques for Success

May 23, 2022

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Training Director - Utah State Council

Presenter:

Robert "Bob" Diaz

Financial Secretary, Council 14239, Riverton

UTAH KNIGHTS OF COLUMBUS





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





To: 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, DGK/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
- (208) 685-9726





Next Webinar

TBD

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.





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.





**FATHER MCGIVNEY,
PRAY FOR US.**

VIVAT JESUS!

WWW.KOFC.ORG/BEATIFICATION



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