

NEBRASKA KNIGHTS OF COLUMBUS

Financial Secretary Training



PLAN OF INSTRUCTION

What is a Financial Secretary?

Officers Online

Member Management

FAQs

- Forms and Programs
- Supreme/State Assessments
- Audits
- Affiliate Membership Initiative
- Printing Cards
- IRS Form 990
- Other Tips



WHAT IS A FINANCIAL SECRETARY?

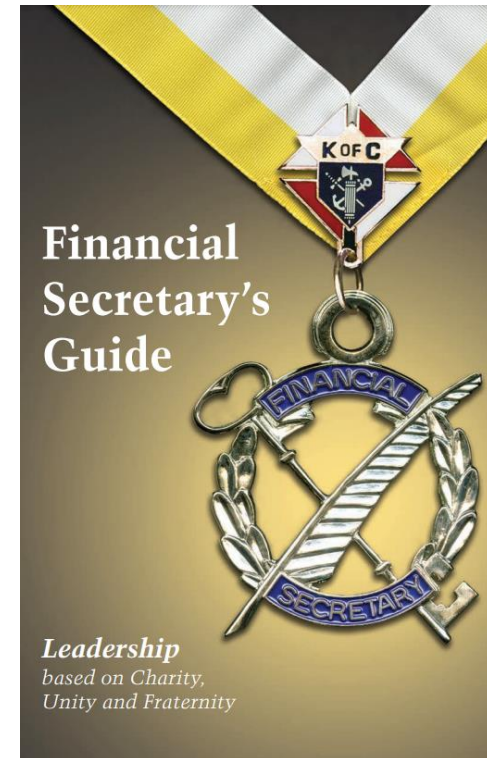
- Appointed/Bonded by Supreme
- Appointed (not Elected) for 3 Years
- Continuity When There is Turnover
- Keeper of the Council Seal
- Keeper of the Membership Roll
- Constitutional Roll and Day-to-Day Management
- Interface with Insurance Agency
- Assists in Managing the Council Administration
- Collects Dues and Other Monies Brought In
- Creates Vouchers to Spend Council Funds
- Initiates Retention Actions
- Order Supplies w/ Grand Knight
- Complete and Submit IRS Form 990

Along with Treasurer and GK provides Financial Transparency



WHAT YOU ARE NOT...

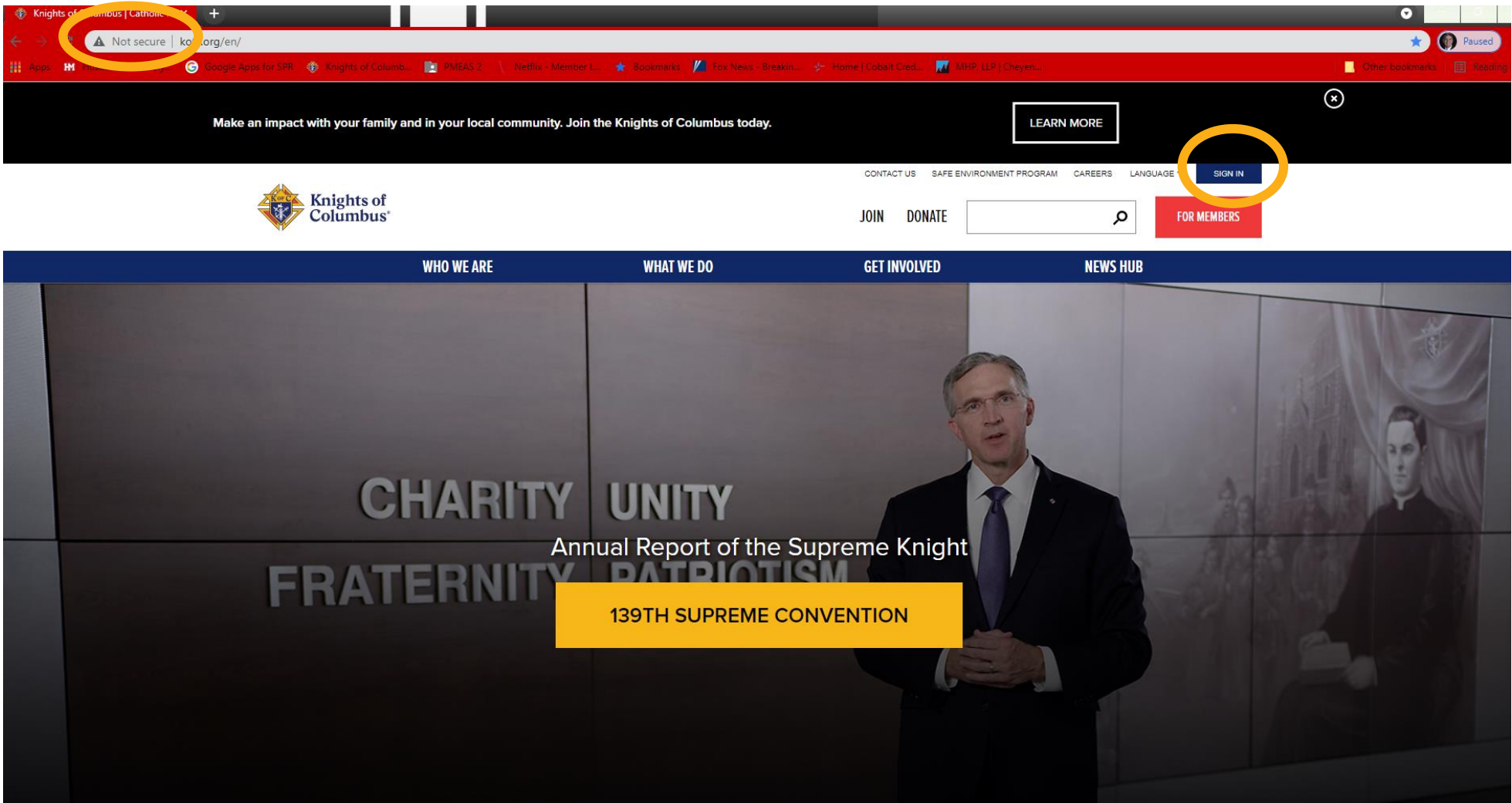
- An Elected Member of Your Council
- Awards Monitor
- Program Director
- Membership Chairman
- Retention Chairman



But...They Can't Do Their Job Without You Doing Yours



SUPREME MAIN PAGE



OFFICERS ONLINE LOG-IN PAGE



SIGN IN

KOFC HOME

Please enter your username and password and click on the "Sign In" button to sign in. Fields marked with an asterisk (*) are required.

You must be a registered user to access this portal.

Username is Required.

Password *

☒ Remember Me

SIGN IN

[PASSWORD RESET](#)

[ACCOUNT ASSISTANT](#)



MEMBER MANAGEMENT

OFFICERS ONLINE

Officers Online

kofof.org/au/apps/oo/index.html?_timestamp=1635355806803

KNIGHTS OF COLUMBUS OFFICERS ONLINE

CHANGE PASSWORD LOGOUT

LANGUAGE: ENGLISH FAQ

Officers Online

Hi Michael V... Last Login: 10/27/2021 at 1:27 pm

Change Role: Financial Secretary

Urgent Messages

Nebraska 40 #1966 (Plattsmouth)

Supporting Applications

Officers Desk Reference

Office Of Youth Protection

Home Corporations

Member Management

Member Billing

By Laws Online

Knights Gear

Supplies Online

Canadian Supplies Online

NOTE

FS/FC are the only members to have full access to council/assembly information

Prospect: Someone who joined through the supreme portal and is eligible to join your Council

Candidate: Latest way to add a new member

Membership Reports Forms Publications Prospect Candidate

Awards Progress								
	Quota	Month to Date	Year to Date					
		Gain	Loss	Net	Gain	Loss	Net	%
MBR	6	0	0	0	1	0	1	17
INS	0	0	0	0	0	0	0	

Council Membership	
Total Membership	YTD Change in Membership
129	0



NAVIGATING SUPPLIES

- Can no longer charge supplies to your council
- Requires credit/debit card...see Officers Desk Reference!



Officers Online

Hi Michael Vaughn | Last Login: 4/10/2022 at 3:13 pm

Change Role: **Financial Secretary**

Urgent Messages

Council Program and Supply Purchases (e.g., Coats for Kids)
When purchasing items from Supplies Online or Knightsgear individuals can no longer select "Charge Council or Assembly" at checkout. All orders must be paid in full at checkout. This includes Coats for Kids. Councils and assemblies are now able to obtain a credit or debit card in their name for approved expenses. Information is available under Financial Matters in the Officers Desk Reference.

Email Addresses Mandatory for Safe Environment Roles
In order to be counted towards a council's Safe Environment compliance, Grand Knights, Program Directors, Family Directors, and Community Directors must have a unique email address entered as their "Primary Email" in Member Management.

Nebraska > 40 > #1966 (Plattsmouth)

Supporting Applications

- Officers Desk Reference
- Office Of Youth Protection
- Home Corporations
- Member Management
- Member Billing
- By Laws Online
- Knights Gear
- Supplies Online**
- Canadian Supplies Online

Membership | Reports | Forms | Publications | Prospect | Candidate

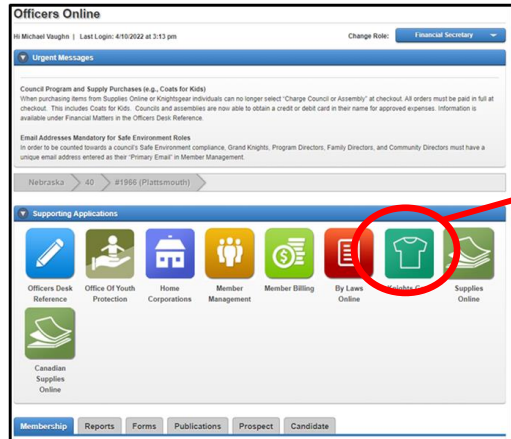
Email: customersupport@webbmason.org
Available M-F 8AM-6PM EST
Toll Free: 1-833-591-7770
Direct Phone Line: 1-443-541-8550

Need help navigating the site? Watch this video for helpful information.

HOP MY ORDERS LOGOUT

Award

NAVIGATING SUPPLIES



The English Company
<https://www.kofcsupplies.com/>

Ceremonial Supplies
Plaques
Jewels, Baldrics, etc



COUNCIL STATEMENT



Officers Online

Hi Michael Vaughn | Last Login: 4/10/2022 at 3:13 pm

Change Role: **Financial Secretary**

Urgent Messages

Council Program and Supply Purchases (e.g., Coats for Kids)
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Email Addresses Mandatory for Safe Environment Roles
In order to be counted towards a council's Safe Environment compliance, Grand Knights, Program Directors, Family Directors, and Community Directors must have a unique email address entered as their "Primary Email" in Member Management.

Nebraska > 40 > #1966 (Plattsmouth)

Supporting Applications

Officers Desk Reference | Office Of Youth Protection | Home Corporations | Member Management | Member Billing | By Laws Online | Canadian Supplies Online

Membership **Reports** Forms Publications Prospect Candidate

Report Name	Date	PDF	Excel
Membership Roster	4/12/2022		
Membership Roster - January	1/1/2022		
Membership Roster - July	7/1/2021		
Financial Statement	4/1/2022		
Safe Environment Member Status	4/12/2022		
Safe Environment Participation Rate Report	4/12/2022		
Council Billing Statement (Past)	3/31/2022		

COUNCIL STATEMENT

- Ready by the first of the month
- Retained for 18 months
- No longer mailing statements
- Must be able to log into Officers Online
- New address to remit funds to Supreme
- Monthly email reminding when Council statement is ready

KNIGHTS OF COLUMBUS COUNCIL STATEMENT-SUMMARY AND PAYMENT COUPON									
DATE	ST	COUNCIL	LOCATION	MEMBERSHIP	QUOTA	GAIN	LOSS	NET	ATTAINED
04/01/22	NE	1966	PLATTSMOUTH	MEMBERSHIP	6	4	0	4	66.60 %
				INSURANCE	0	0	0	0	0.00 %

MICHAEL G. VAUGHN
 1609 HEDGEAPPLE RD
 PLATTSMOUTH NE 68048-5666

IF YOU HAVE ANY QUESTIONS REGARDING YOUR COUNCIL STATEMENT PLEASE CALL
 FOR MEMBERSHIP: (203) 752-4210
 FOR BILLING: (203) 752-4392

COUNCIL STATUS: IN GOOD STANDING

SUMMARY		MEMBERSHIP BY CATEGORY				INCLUDED IN TOTAL		
MEMBER INFORMATION	DATE	ASSOC	INS	INACT	TOTAL	HON	HL	EXM
MEMBERSHIP TOTALS	04/01/22	81	45	0	126	5	27	3

SUMMARY		ACCOUNTS			
FINANCIAL INFORMATION	DATE	PER CAPITA	CATHOLIC ADVZ CULTURE OF LIFE	SUPPLIES	TOTAL
AMOUNTS DUE	04/01/22	0.00	0.00	0.00	0.00

SEMIANNUAL AUDIT FORM No. 1295 - RECEIVED.
REMEMBER TO SUBMIT RSVP & FOOD FOR FAMILIES REFUND APPLICATION.

PLEASE RETAIN TOP PORTION FOR COUNCIL RECORDS
PLEASE RETURN THIS PORTION WITH PAYMENT

PAYMENT COUPON			
PAYMENT DUE UPON RECEIPT			
ST	COUNCIL	LOCATION	REMIT DATE: 04/01/22
NE	1966	PLATTSMOUTH	TOTAL AMOUNT DUE: \$.00

MAIL THIS COUPON WITH YOUR REMITTANCE TO:

KNIGHTS OF COLUMBUS-COUNCIL ACCOUNTS
 PO BOX 382172
 PITTSBURGH PA 15251-8172

800000000260019660000000004012214



OFFICERS DESK REFERENCE

- Definitive guidance on the interpretation of the Constitution and Laws of the Order...repository of information
- One stop shop for virtually all questions
- FSs and FCs should pay particular attention to the sections on Membership Issues and Financial Issues
 - Peruse all sections from time to time
- PayPal, Square, debit cards, etc. all have guidance and requirements



MEMBER MANAGEMENT

- Official Way of Tracking Funds
- Facilitates Movement of Funds
- Initiates, Collects, and Tracks Annual Dues and Assessments
- Tracks Membership
- Produces Membership Cards
- Dynamic Data Base
 - Scalable for Your Needs
- Provides Documentation for Audit



MEMBER MANAGEMENT (CONT)

- System is Secure (HTTPS)
- System will not “Balance your Books”
 - Still Need an Active Treasurer
- Access through Officers Online
- Divided into Three Main Sections
 - Council Activities
 - Member Management
 - Member Billing (really all billing!)

All Councils Should Be Using Member Management



MEMBER MANAGEMENT

COUNCIL ADMINISTRATION SECTION

- Notifies Hierarchy Who in Charge
- Tracks Council Officers and Committee Leads
- Provides Basis for Dues, Assessments, and Special Rates
- Updates Officers and Committee Leads After Elections
 - ***Both Forms are Due by June 30th***
- Updates Go Directly to Supreme
- Provide updates to State Executive Secretary

Updates Immediately Upon Change





MEMBER MANAGEMENT

COUNCIL ADMINISTRATION SECTION (CONT)

English | Español | Français Home | Contact Us | Logout

 **KNIGHTS OF COLUMBUS** Find a Member by Last Name: Go

Print this screen  


Officers Online Member Billing Member Management **Council Administration** Print Center-MM

Council Administration

- Council Information
- Council Officers Current & Next
- Service Program Personnel Current & Next
- Additional Positions
- Member Interests
- Parish List
- Title List
- Download Tools

Council Administration - Council Information ✓

Council Council 1966

 Electronic Version of SF 185 and 365
"Update and Done" -08-1919

Reset

Key Contacts | Detail Info | Address Info | Meeting Info |

Key Contacts

Title	Name	Telephone #'s	
Financial Secretary	Michael G Vaughn	402-296-5422 (R) 402-297-5434 (C)	
Grand Knight	George A Johnson	402-235-3518 (R) 402-541-6049 (C)	

Display All

Key Contacts | Detail Info | Address Info | Meeting Info |

Detail Information

Country: United States

Phone: Ext.

Fax Number:

Local Council Website:




MEMBER MANAGEMENT

MEMBER MANAGEMENT SECTION

- Manages all Council Personnel
- Up to You to Determine Detail
 - For Example; Birthdays, Spouse Info, etc.
 - Print Section Allows for Specialized Lists
- Divided Into:
 - Fraternal Information
 - Personal Information
 - Public Information
- Prints Only Items Related to Member Management

English | Español | Français Home | Contact Us | Logout

KNIGHTS OF COLUMBUS Find a Member by Last Name: Go Print this screen 

Officers Online Member Billing **Member Management** Council Administration Print Center-MM

• Member Management
• Find a Member
▶ Search Results
▶ General Information
▶ Fraternal Information
▶ Personal Information
▶ Member Interests
▶ Contact Notes
▶ Change History

Member Management - Find A Member

Search Criteria

Display records for the following:

☒ Active Members ☐ Former Members

Required Criteria

Last Name: -or- Member #:

Search Tips

Search Reset

Must be in the Member Management Tab To Print Info from it



-

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MEMBER MANAGEMENT

MEMBER BILLING SECTION - ASSESSMENTS



KNIGHTS OF COLUMBUS Find a Member by Last Name: [Print this screen](#)

[Officers Online](#) [Member Management](#) [Member Billing](#) [Print Center-MB](#)

Council Billing & Accounting - Enter Dues Assessment

Council

FATHER SHINE **Council 1966**

Council Location: PLATTSMOUTH **Jurisdiction:** NE
District: 040 **Date of Institution:** 06-08-1919

Billing Cycle

Billing Period: Jan 01, 2021 - Dec 31, 2021 **Billing Status:** 1st Notice **As of Date:**
MM-DD-YYYY

[Current Billing Cycle Schedule](#)

Amount to be Assessed

Dues Amounts for Billing Period - Supreme

Class	Amount to Apply
Regular	30.00
Honorary	15.00
Honorary Life	0.00

Dues Amounts for Billing Period - Council

Sub Class	Amount to Apply
Active Duty Military	15.00
Seminarian	0.00
Student	15.00

[Class List](#)

Changes billing cycle to 2nd Notice, Knight Alert and Intent to Retain

Changes dues and allows you to add sub classes

Date cannot be earlier 15 Dec but you can cheat!

Regular dues cannot be zero

NOTE
Make sure all dues amounts are accurate before assessing

MEMBER MANAGEMENT

MEMBER BILLING SECTION ASSESS OTHER

English | Español | Français

Home | Contact Us | Logout

Find a Member by Last Name: Go

Officers Online Member Management Member Billing Print Center-MB

Council Ledger

- Receipts
- Vouchers
- Assessments
 - Enter Assessments
 - Assess Dues
 - Update Status
 - Assess Other
- Pending Assessments
- Assessment History
- Adjustments
- Billing Information
- Member Information
- Email

Council Billing & Accounting - Enter Other Assessment

Council

FATHER SHINE Council 1966

Council Location: PLATTSMOUTH District: 040 Jurisdiction: NE Date of Institution: 06-08-1919

Other Assessment

Date to Apply: 11-03-2021 Charge to: All Billable

Type: Special ☒ Miscellaneous ☐ Assessment Indicator: Voluntary ☒ Mandatory ☐ Valid thru Date: MM-DD-YYYY

Amount: Reason for Assessment: Description: 128 character limit

Assess Other

Add Reason for Assessment

Reset

Assess Other allows for voluntary assessments. They are limited in duration



English | Español | Français

Home | Contact Us | Logout

Find a Member by Last Name: Go

Officers Online Member Management Member Billing Print Center-MB

Council Ledger

- Receipts
- Vouchers
- Assessments
 - Enter Assessments
 - Pending Assessments
 - Assessment History
- Billing Information
- Member Information
- Email

Council Billing & Accounting - Assessment History

Council

FATHER SHINE Council 1966

Council Location: PLATTSMOUTH District: 040 Jurisdiction: NE Date of Institution: 06-08-1919

View History

By Date By Assessment Type

Show from: 12-01-2020 to: 11-03-2021 Search

Assessment History

Date Applied	Assessment Type	Reason for	Valid thru Date	Total Adjustments	Total Billed
12-15-2020	Annual Dues			150.00	2,970.00
12-1-2020	Misc Assessment	Archdiocese for Military Services	03-31-2021	8.00	840.00
12-05-2020	Archdiocese for Military Services	Archdiocese for Military Services	03-31-2021	12.00	1,260.00

Uncollected Voluntary Assessments must be forgiven

Fransais

Home

Find a Member by Last Name: Go

Officers Online Member Management Member Billing

Council Billing & Accounting - Assessment Detail

Council

FATHER SHINE Council 1966

Council Location: PLATTSMOUTH District: 040 Jurisdiction: NE Date of Institution: 06-08-1919

Assessment Details

Date Applied: 12-15-2020	Charge to: All Billable
Type: Miscellaneous	Assessment Indicator: Voluntary
Assessed Amount: 8.00	Valid thru Date: 03-31-2021
Total Adjustment: 8.00	Reason for Assessment: Archdiocese for Military Services
Total Billed: 840.00	Description: Council Support to the Military Chaplain Services

Date Forgiven: 04-12-2021

Save

<< Back

Check "Forgive" box and an adjustment is made for each member who elects not to support



FORMS AND PROGRAMS

- Who is Responsible?
- Most are Electronic: Scan/Email, Fax or Mail
- Due Dates
 - Identified in Knightline, Council Statements, and Websites
- What about Charitable events like One Rose, One Life, BAM, RSVP, etc.?
- Forms: SF7, Audits, etc.



SUPREME DUE DATES

FORMS AND REPORTS

Due Date

Form/Report

June 30

Report of Chosen Officers for the Term (#185)
OR the Officers Screen on Member Management
*Service Program Personnel Report (#365)**
OR the Service Personnel Screen on Member Management

August 15

Semiannual Council Audit (#1295)

September 15

District Deputy Report (#944)

January 31

*Annual Survey of Fraternal Activity (#1728)**

February 15

Semiannual Council Audit (#1295)

June 30

*Columbian Award Application (#SP-7)**

Immediately

Membership Document (#100)

If Required

Notice of Intent to Retain (#1845)

As Required

Entries for the State Council Service Program Awards Contest (#STSP) and Family of the Year Contest to your state council

Monthly

Family of the Month (#1993)

* Indicates Star Council Award Requirement



Form 450 has been eliminated

STATE DUE DATES

Due Date	Description
1-Sep	July State Per Capita Assessment
1-Sep	July Supreme Per Capita Assessment
1-Sep	First ICC Submission
31-Jan	Intellectual Disabilities (Tootsie Roll®) Program Report
1-Mar	January Supreme Per Capita Assessment
1-Mar	January State Per Capita Assessment
1-Mar	Final ICC Submission
1-Mar	Award Nominations



SUPREME AND STATE ASSESSMENTS

(DUE UPON RECEIPT)



Assessments			
	State	Supreme	Grand Total
Jan Per Capita	\$4.87	\$1.75	
Jan Catholic Advertising		\$0.50	
Jan Culture of Life		\$1.00	
Jul Per Capita	\$4.88	\$1.75	
July Catholic Advertising		\$0.50	
July Culture of Life		\$1.00	
Total	\$9.75	\$6.50	\$16.25

Honorary Life does not pay any dues

Disabled do not pay dues

Honorary Members do not pay Culture of Life so dues are \$2.00 less



AUDIT

- Audit is Required Semi-Annually
- Conducted by Grand Knight and the Trustees
- Requires Close Coordination Between Auditors, Treasurer, and FS
- FS Needs to Produce the “Ledger” of Receipts and Vouchers
- Treasurer Produces his Ledger to the Auditors
- Documented and Signed on Audit Form
- Completed Audit is Forwarded to Supreme

See Pages 13-16 Leadership Resources



AUDIT



KNIGHTS OF COLUMBUS

SEMIANNUAL COUNCIL AUDIT REPORT

FOR PERIOD ENDED JUNE 30, 2018

COUNCIL NO. **F02 01966** CITY **06/30/2018** STATE **Nebraska** Due By: AUGUST 15

SCHEDULE A - MEMBERSHIP

ADDITIONS	INS.	ASSO.	TOT.	DEDUCTIONS	INS.	ASSO.	TOT.
Total members start of period				Suspensions			
Initiations				Deaths			
Transfers from other councils				Withdrawals			
Transfers—assoc. to insurance				Transfers—assoc. to insurance			
Transfers—ins. to associate				Transfers—ins. to associate			
Re-entries				Transfers to other councils			
Total for period				Total deductions			
Minus total deductions				Do not include inactive insurance members in this section. See Knights of Columbus Leadership Resources (#5093) booklet.			
Number members end of period							

☒ Our council uses Member Management/Member Billing. The requirement for completing Schedule A is satisfied.

SCHEDULE B - CASH TRANSACTIONS

FINANCIAL SECRETARY	TREASURER
Cash on hand beginning of period \$ 0.00	Cash on hand beginning of period \$ 4,456.83
Cash received—dues, initiations \$ 2,415.00	Received from financial secretary \$ 22,023.29
Cash received from other sources: (Explain kind and amount)	Transfers from sav./other accts. \$ 0.00
Golf Tournament \$ 12,401.47	Interest earned \$ 0.00
Free-Will Donation \$ 4,370.82	Total receipts \$ 26,480.12
Misc \$ 2,836.00	Disbursements
Total cash received \$ 22,023.29	Per capita: Supreme Council \$ 323.75
Transferred to treasurer \$ 22,023.29	State council \$ 454.48
Cash on hand at end of period \$ 0.00	General council expenses \$ 618.00
	Transfers to sav./other accts. \$ 0.00
	Miscellaneous \$ 23,339.41
	Total disbursements \$ 24,735.64
	Net balance on hand \$ 1,744.48

SCHEDULE C - ASSETS AND LIABILITIES

ASSETS	LIABILITIES
Cash:	Due Supreme Council:
Undeposited funds \$ 0.00	Per capita \$ 0.00
Bank — Checking acct. \$ 1,744.48	Supplies \$ 0.00
— Savings acct. \$ 0.00	Catholic advertising \$ 0.00
— Money market accts. \$ 0.00	Other \$ 0.00
Due from 10 members \$ 300.00	Due state council \$ 0.00
Total current assets \$ 2,044.48	Advance payments by 1 members \$ 30.00
Less: current liabilities \$ 30.00	Misc. liabilities \$ 0.00
Net current assets \$ 2,014.48	
Other Assets:	
Short term CD \$ 2,033.86	
Money Market	
Mutual Funds	
Misc. assets \$ 2,581.77	
Total other assets \$ 4,615.63	
Total assets \$ 6,630.11	

Please complete all items. Insert "None" where no figures are.

SEND ONE COPY TO: Council Accounts
Email: council.accounts@kofc.org
Fax: 855-228-1396
Mail: 1 Columbus Plaza, New Haven, CT 06510

COPIES TO: State Deputy, District Deputy, Council File

Available in electronic format at kofc.org/forms 1295 12/16

KNIGHTS OF COLUMBUS

SEMIANNUAL COUNCIL AUDIT REPORT

FOR PERIOD ENDED DECEMBER 31, 2018

COUNCIL NO. **F02 01966** CITY **12/31/2018** STATE **NE** Due By: FEBRUARY 15

SCHEDULE A - MEMBERSHIP

ADDITIONS	INS.	ASSO.	TOT.	DEDUCTIONS	INS.	ASSO.	TOT.
Total members start of period				Suspensions			
Initiations				Deaths			
Transfers from other councils				Withdrawals			
Transfers—assoc. to insurance				Transfers—assoc. to insurance			
Transfers—ins. to associate				Transfers—ins. to associate			
Re-entries				Transfers to other councils			
Total for period				Total deductions			
Minus total deductions				Do not include inactive insurance members in this section. See Knights of Columbus Leadership Resources (#5093) booklet.			
Number members end of period							

☒ Our council uses Member Management/Member Billing. The requirement for completing Schedule A is satisfied.

SCHEDULE B - CASH TRANSACTIONS

FINANCIAL SECRETARY	TREASURER
Cash on hand beginning of period \$ 0.00	Cash on hand beginning of period \$ 1,744.48
Cash received—dues, initiations \$ 60.00	Received from financial secretary \$ 12,951.22
Cash received from other sources: (Explain kind and amount)	Transfers from sav./other accts. \$ 0.00
Free-Will Donation \$ 5,183.35	Interest earned \$ 0.00
Harvest Festival \$ 2,285.50	Total receipts \$ 14,694.70
Misc \$ 5,422.50	Disbursements
Total cash received \$ 12,891.22	Per capita: Supreme Council \$ 332.00
Transferred to treasurer \$ 12,951.22	State council \$ 464.28
Cash on hand at end of period \$ 0.00	General council expenses \$ 58.34
	Transfers to sav./other accts. \$ 0.00
	Miscellaneous \$ 9,833.38
	Total disbursements \$ 10,688.00
	Net balance on hand \$ 4,006.70

SCHEDULE C - ASSETS AND LIABILITIES

ASSETS	LIABILITIES
Cash:	Due Supreme Council:
Undeposited funds \$ 0.00	Per capita \$ 0.00
Bank — Checking acct. \$ 4,006.70	Supplies \$ 0.00
— Savings acct. \$ 0.00	Catholic advertising \$ 0.00
— Money market accts. \$ 0.00	Other \$ 0.00
Due from 8 members \$ 240.00	Due state council \$ 0.00
Total current assets \$ 4,246.70	Advance payments by 1 members \$ 30.00
Less: current liabilities \$ 30.00	Misc. liabilities \$ 0.00
Net current assets \$ 4,216.70	
Other Assets:	
Short term CD \$ 2,033.86	
Money Market	
Mutual Funds	
Misc. assets \$ 2,589.38	
Total other assets \$ 4,623.24	
Total assets \$ 8,839.94	

Please complete all items. Insert "None" where no figures are.

SEND ONE COPY TO: Council Accounts
Email: council.accounts@kofc.org
Fax: 855-228-1396
Mail: 1 Columbus Plaza, New Haven, CT 06510

COPIES TO: State Deputy, District Deputy, Council File

Available in electronic format at kofc.org/forms 1295 12/16

AUDIT

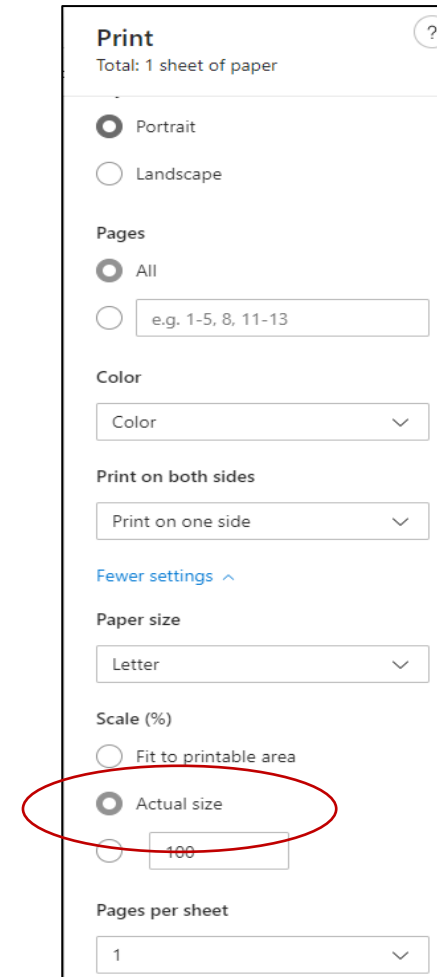
KNIGHTS OF COLUMBUS		SEMIANNUAL COUNCIL AUDIT REPORT	
		FOR PERIOD ENDED JUNE 30, 2018	
COUNCIL NO. F02 01966	CITY 06/30/2018	Due By: AUGUST 15	
STATE Nebraska			
SCHEDULE A — MEMBERSHIP			
ADDITIONS	INS. ASSO. TOT.	DEDUCTIONS	INS. ASSO. TOT.
Total members start of period		Suspensions	
Initiations		Deaths	
Transfers from other councils		Withdrawals	
Transfers—assoc. to insurance		Transfers—assoc. to insurance	
Transfers—ins. to associate		Transfers—ins. to associate	
Re-entries		Transfers to other councils	
Total for period		Total deductions	
Minus total deductions		Do not include inactive insurance members in this section. See Knights of Columbus Leadership Resources (#5093) booklet.	
Number members end of period			
<input checked="" type="checkbox"/> Our council uses Member Management/Member Billing. The requirement for completing Schedule A is satisfied.			
SCHEDULE B — CASH TRANSACTIONS			
FINANCIAL SECRETARY		TREASURER	
Cash on hand beginning of period	\$ 0.00	Cash on hand beginning of period	\$ 4,456.83
Cash received—dues, initiations	\$ 2,415.00	Received from financial secretary	\$ 22,023.29
Cash received from other sources:		Transfers from sav./other accts.	\$ 0.00
(Explain kind and amount)		Interest earned	\$ 0.00
Golf Tournament \$ 12,401.47		Total receipts	\$ 26,480.12
Free-Will Donation \$ 4,370.82		Disbursements	
Misc \$ 2,836.00		Per capita: Supreme Council	\$ 323.75
Total cash received	\$ 19,608.29	State council	\$ 454.48
Transferred to treasurer	\$ 22,023.29	General council expenses	\$ 618.00
Cash on hand at end of period	\$ 0.00	Transfers to sav./other accts.	\$ 0.00
		Miscellaneous	\$ 23,339.41
		Total disbursements	\$ 24,735.64
		Net balance on hand	\$ 1,744.48
SCHEDULE C — ASSETS AND LIABILITIES			
ASSETS		LIABILITIES	
Cash:		Due Supreme Council	\$ 0.00
Undeposited funds	\$ 0.00	Per capita	\$ 0.00
Bank — Checking acct.	\$ 1,744.48	Supplies	\$ 0.00
— Savings acct.	\$ 0.00	Catholic advertising	\$ 0.00
— Money market accts.	\$ 0.00	Other	\$ 0.00
Due from 10 members	\$ 300.00	Due state council	\$ 0.00
Total current assets	\$ 2,044.48	Advance payments by 1 members	\$ 30.00
Less: current liabilities	\$ 30.00	Misc. liabilities	\$ 0.00
Net current assets	\$ 2,014.48		\$ 0.00
Other Assets:			\$ 0.00
Short term CD	\$ 2,033.86		\$ 0.00
Money Market	\$		\$ 0.00
Mutual Funds	\$		\$ 0.00
Misc. assets	\$ 2,581.77		\$ 0.00
Total other assets	\$ 4,615.63		\$ 0.00
Total assets	\$ 6,630.11		\$ 0.00
Please complete all items. Insert "None" where no figures are			
SEND ONE COPY TO: Council Accounts			
Email: council.accounts@kcof.org			
Fax: 855-228-1396			
Mail: 1 Columbus Plaza, New Haven, CT 06510			
Available in electronic format at kcof.org/forms			
1295 12/16			

All U.S. Councils must file form 990 with IRS annually. For info call 203-752-4281 or refer to Officer's Desk Reference.



PRINTING MEMBERSHIP CARDS

- Done in Member Billing
- Save the Downloaded PDF File to your PC and Close Browser
- Print from the downloaded PDF file saved to your PC
 - Printing from Browser Can Select Wrong Scale
- Ensure “Actual Size” or “100%” Scale is selected
 - Some Variations in Printers
 - Trial and Error



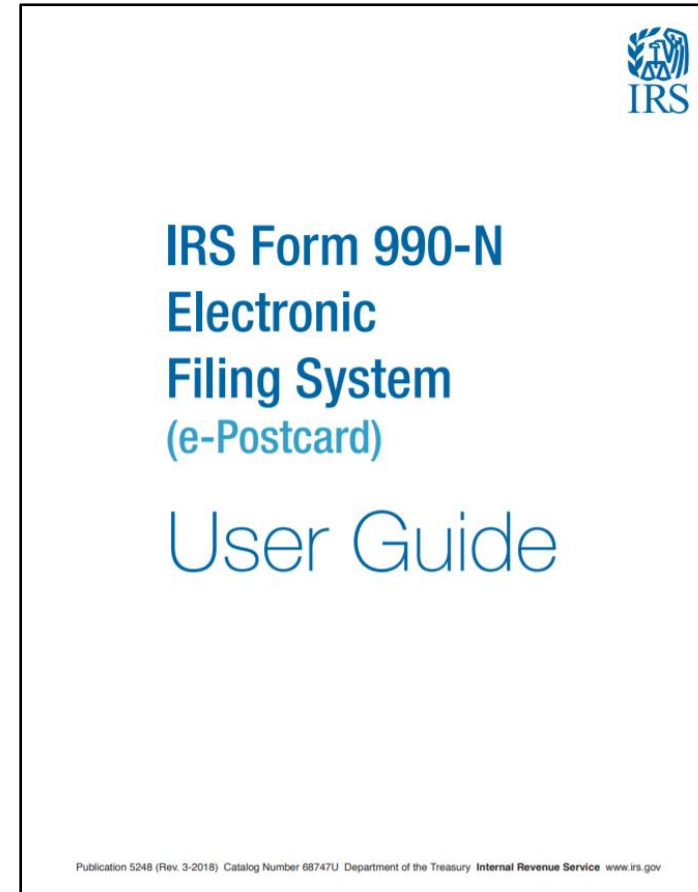
The image shows a print dialog box with the title 'Print' and a subtitle 'Total: 1 sheet of paper'. It contains several settings: 'Portrait' is selected under orientation; 'All' is selected under 'Pages'; 'Color' is selected under 'Color'; 'Print on one side' is selected under 'Print on both sides'; 'Letter' is selected under 'Paper size'; 'Actual size' is selected under 'Scale (%)' and is circled in red; and '1' is selected under 'Pages per sheet'. A 'Fewer settings' link is also visible.

Always Do a Practice Run!



IRS FORM 990

- Required Annually -Cannot Skip a Year
- Plenty of Notice
- 990N Electronic Post Card
 - Under \$50,000 in Gross Revenues
- 990-EZ: \$50K to \$200K
- Form 990: > \$200K
- Failure to comply: Loss of Tax Status and revoking of EIN



<https://www.irs.gov/charities-non-profits/annual-electronic-filing-requirement-for-small-exempt-organizations-form-990-n-e-postcard>



SUSPENSION: FAILURE TO PAY DUES

Follow the Process

- Ensure you Sent the Proper Dues Notices
 - 1st Notice, 2nd Notice, and Knight Alert
- Process Intent to Retain Paperwork
 - Mail Copy to Member and Email to Supreme
 - Supreme and State Will Spend the Next 60 Days Attempting to Convince the Member to Remain a Member and Pay their Dues
- After 60 Days (no earlier or later) Submit Form 100 for Suspension.
 - If Supreme Receives the Suspension Form 100 After the 90th Day from the Intent to Retain Paperwork, You Will Need to Start Over with a New Intent to Retain Memo
- If Insurance Member, the Suspended Member Will Remain on Your Rolls

Note

Need to
find out why



AFFILIATE MEMBERSHIP INITIATIVE

- Single biggest change in membership in my time as a Knight
- Recognizes the value of members who cannot be active in their local council
- Process will become permanent
- Less than 9% of membership effected
- Less than 1% want to quit KofC
- AMI members do not pay dues
- AMI transfers will be removed from your State Capital



AFFILIATE MEMBERSHIP INITIATIVE (Cont)

- Withdraw a member who no longer wants to be a Knight
- If an AMI member transfer back to your council, do not charge dues in the arrears
- Follow the Guidebook Appendix B
- <https://nebraskakofc.org/membership/recruiting-resources.html>
- Questions: Contact Supreme at affiliate@koc.org or 203-752-4270

Suspension transactions are reserved for Summary Suspension for Cause and Board actions



DISABILITY EXEMPTION (#1831)

- Relief from dues and per capita
- GK and FS attestation only
- No doctor's report
- No annual recertification
- Forms section of “For Members”

**Application for Per Capita
Disability Exemption**

CERTIFICATION OF COUNCIL

Council No. _____


This is to certify that _____, _____ is a
(Member Name) (Member Number)
member in good standing in this council and that he is eligible for relief from payment of all council dues and Supreme and state council per capita taxes, due to total disability, as authorized by Section 118(e) of the Charter, Constitution, and Laws of the Knights of Columbus.

Attest: _____
Financial Secretary Grand Knight

Dated _____

Submit completed form to membership@kofc.org.

Notes: If the application is approved, dues and per capita shall be waived until the financial secretary notifies membership@kofc.org that the exemption should be rescinded. Membership that is continued under the provisions of Section 118(e) shall be construed as active membership in computing the membership requirement for recognition as honorary or honorary life membership.



1831 3/22



FRATERNAL LEADER ADVISORY

- Sent from Supreme directly to council leadership (and others)
- Provides breaking news, reminders resources and recommendations
- Emailed directly to you...not getting...verify email and ensure it is not going to Junk mail

<https://conta.cc/38lsSdg>

All FSs and FCs must receive



OTHER TIPS

- Council Bi-Laws
 - Advocate is Responsible
 - Update Periodically: Red Tab on Officers Online
- FS is 5th in line to conduct a Business Meeting
 - GK, Dep GK, Chancellor, Recorder **then FS** IAW Sec 126/136 of KofC Constitution
- Work with the Insurance Agent
 - His Eyes and Ears to the Council



OTHER TIPS (CONT)

- Safe Environment Training
- Budget
 - Section 122(B) – the \$500.00 rule
 - Annual Budgets Satisfy the \$500 Rule



RESOURCES

Leadership Resources (#5093)

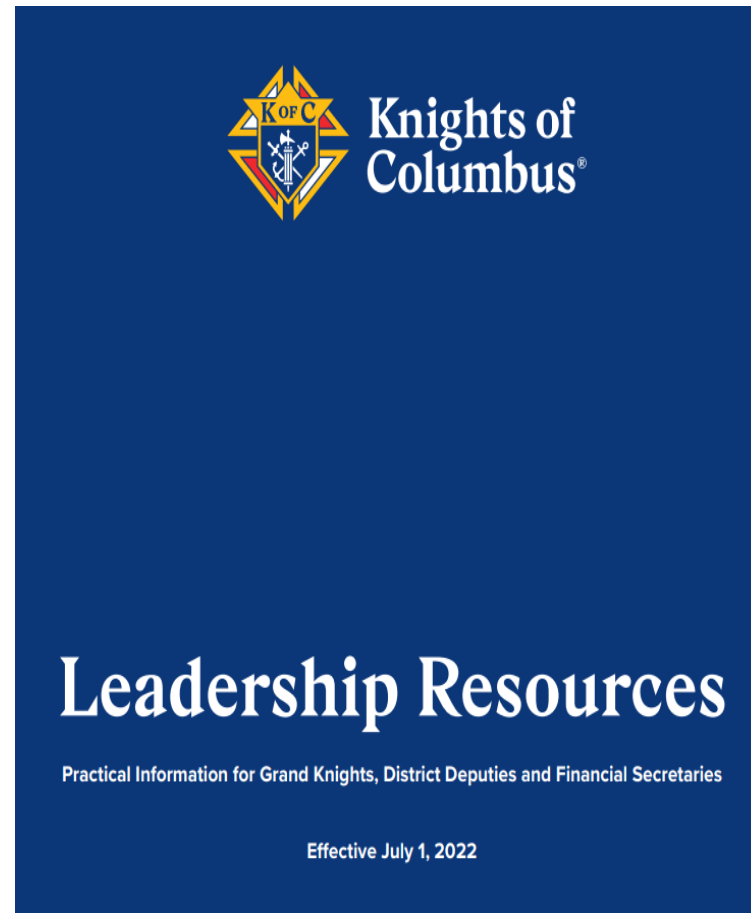
<https://www.kofc.org/en/resources/officers/officers.pdf>

Financial Secretary Guide (#5089)

<https://www.kofc.org/en/resources/officers/fshandbook.pdf>

Fraternal Video Library:

<https://www.kofc.org/en/videos/fraternal-training-library.html>



You Are Not Alone...

GENERAL SECTION

SUPREME COUNCIL HEADQUARTERS CONTACT DIRECTORY

Main Number	203-752-4000	
Customer Service	1-800-380-9995	
KnightsGear.....	1-855-432-7562	knightsgear@kofc.org
Supplies Online	1-833-591-7770	customersupport@webbmason.com
Fraternal Mission.....	203-752-4270	fraternalmission@kofc.org
Affiliate Membership	203-752-4270	affiliate@kofc.org
Catholic Information Service	203-752-4574	cis@kofc.org
Ceremonials	203-752-4346	ceremonials@kofc.org
Chaplains Programs and Development	203-752-4267	chaplains@kofc.org
Columbia Magazine	203-752-4398	columbia@kofc.org
Council Accounts	203-752-4392	council.accounts@kofc.org
Financial Secretary Appointments	203-752-4285	financial.secretary@kofc.org
Membership Growth	203-752-4473	councilgrowth@kofc.org
Membership Records.....	203-752-4210	membership@kofc.org
Member Management/Member Billing	203-752-4210	expertfs@kofc.org
Scholarships.....	203-752-4332	scholarships@kofc.org
For general inquiries, email.....		info@kofc.org

State FS Coordinator

Chairman Michael Vaughn

Home: 402-296-5422 Cell: 402-297-5434

Email: fscoordinator@nebraskakofc.org



NEBRASKA KNIGHTS OF COLUMBUS



Questions?

