



St. Vincent de Paul
GEORGIA

OUR MISSION | To serve our neighbors with love and respect: delivering help, hope, and pathways to self-sufficiency.
Feed. Clothe. House. Heal.

New Treasurer Checklist

Getting Started

<input type="checkbox"/>	Commit to at least one 3-year term if asked to serve. Terms begin Oct. 1.	<i>Conference Bylaws pg 11, President's Handbook, pg 3</i>
<input type="checkbox"/>	Attend "Invitation to Lead" within your first year as Treasurer.	svdpgeorgia.org/vincentian-university/
<input type="checkbox"/>	Download the <i>Conference Treasurer Handbook (Aug. 2025)</i> .	svdpgeorgia.org/wp-content/uploads/2022/09/Treasurers-Handbook-9.2022.pdf
<input type="checkbox"/>	Read <i>The Rule</i> and <i>The Manual</i> of the Society.	members.ssvpusa.org/governance/the-rule-the-manual/
<input type="checkbox"/>	Read the Conference Bylaws.	Contact the Council at 678-892-6174 for a copy
<input type="checkbox"/>	Cooperate in the Georgia Strategic Plan (2025-2030).	https://svdpgeorgia.org/strategic-plan/

Training

<input type="checkbox"/>	Attend "Invitation to Lead for Treasurers" in your first year.	https://svdpgeorgia.org/vincentian-university/
<input type="checkbox"/>	Attend "Ozanam Orientation" if you have not already.	svdpgeorgia.org/members/events/
<input type="checkbox"/>	Signup for VIRTUS Training from the Archdiocese of Atlanta.	https://www.virtusonline.org/virtus/reg_list2.cfm?theme=0
<input type="checkbox"/>	Background Check is completed after VIRTUS training.	
<input type="checkbox"/>	Familiarize yourself with the legal structure of SVdP.	members.ssvpusa.org/leadership/
<input type="checkbox"/>	Participate in CMS Training and Advanced CMS Training for Treasurers.	https://svdpgeorgia.org/vincentian-university/

Treasurer's Responsibilities

<input type="checkbox"/>	Present a financial report at regularly scheduled Conference meetings.	<i>See Treasurer's Handbook</i>
<input type="checkbox"/>	Deposit all money daily or as soon as possible.	<i>See Treasurer's Handbook</i>
<input type="checkbox"/>	Pay all bills weekly by check or ACH.	<i>See Treasurer's Handbook</i>
<input type="checkbox"/>	Reconcile all bank accounts monthly with an Assistant Treasurer (or someone other than the President and who does not live in your household).	<i>See Treasurer's Handbook</i>
<input type="checkbox"/>	If required, send a copy of each bank statement(s) to the next higher Council.	<i>See Treasurer's Handbook</i>
<input type="checkbox"/>	File all any reports as required by Georgia Council.	<i>See Treasurer's Handbook</i>
<input type="checkbox"/>	Follow the record retention schedule in the Treasurer's Handbook.	<i>See Treasurer's Handbook</i>
<input type="checkbox"/>	Assist in preparing the Conference Annual Report, due each year on Oct. 30 to the Council. File via National Members Portal.	<i>See Treasurer's Handbook</i>
<input type="checkbox"/>	Attend the "Spring to Life Annual Assembly" and "Quarterly Town Halls" as often as you can.	svdpgeorgia.org/members/events/

Donor Stewardship

<input type="checkbox"/>	Collaborate with the Pastor and Parish Finance Office to collect donations online and in the pew.	
<input type="checkbox"/>	Maintain a roster of donor names, addresses, phone numbers, emails, gift dates and gift amounts.	
<input type="checkbox"/>	Acknowledge donors who provide a gift of at least \$250 or more. A best practice is to send an annual statement of gifts to the donor by Jan. 31 of the following calendar year.	<i>See Treasurer's Handbook</i>
<input type="checkbox"/>	Funds shall not be paid to other charitable organizations no matter how worthy the cause. Funds may be paid to another SVdP Georgia Conference ("twinning").	<i>See Treasurer's Handbook</i>
<input type="checkbox"/>	Coordinate grant applications with the Georgia Council before applications are due.	
<input type="checkbox"/>	Track Grant funding as restricted gifts separately from other funding.	

Need Help?

<input type="checkbox"/>	The Society of St. Vincent de Paul Georgia, Inc. is a 501(c)3 tax exempt non-profit organization. Our tax ID is 58-0967972 .	
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<input type="checkbox"/>	Your Conference President is:	
<input type="checkbox"/>	Your District Treasurer is:	
<input type="checkbox"/>	Your Chief Financial Officer at the Georgia Council is:	