

BROWARD COUNTY GUARDIANSHIP ASSOCIATION

POLICIES AND PROCEDURES MANUAL

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**BROWARD COUNTY GUARDIANSHIP ASSOCIATION
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I. Introduction

A - Purpose

In this manual, the roles and responsibilities of the participants in the Association are delineated and made available to the membership. Additionally, the history of the organization is reviewed for the membership.

The Broward County Guardianship Association, Inc., is a 501(c)(3) non-profit corporation incorporated in 1990 and formed for the improvement of guardianship services. BCGA has a nine member Board of Directors elected at the annual meeting and serving a one-year term.

Membership consists of professional guardians, corporate guardians, not for profit corporate guardians, attorneys, social workers, geriatric case managers, court staff and other individuals interested in the support and advancement of guardianship services and alternatives to guardianship which maintains the dignity of the individual in need of services.

As BCGA continues its growth and development, it is hoped that this manual will prove useful to the Board of Directors and membership. Equally, it is hoped that a better-informed membership will promote a more responsible and stronger Association.

The Policies and Procedures shall govern the day-to-day operations of BCGA. In the event there is a conflict between the Policies and Procedures and By-Laws of BCGA, the By-Laws shall control.

ACKNOWLEDGMENTS

This handbook was originally organized and compiled in 2002-2003 by Nathan A. Tarler. The format was taken from the Florida State Guardianship Association Policies and Procedures Manual (February, 2002). The contributions of all the officers, board members, and committee chairs are gratefully acknowledged. This handbook could not have been completed without their effort and enthusiasm.

Past Presidents

Kerry D. Fitzgerald	1990 – 1991
Michael Blum	1991 - 1992
Knyvett Lee	1992 - 1993
Gary Armstrong	1993 - 1994
Kathleen Phillips	1994 - 1995
Knyvett Lee	1995 - 1996
Rosemarie Testa	1996 - 1997
Kerry D. Fitzgerald	1997 - 1998
Kerry D. Fitzgerald	1998 – 1999
Kerry D. Fitzgerald	1999 – 2000
Kerry D. Fitzgerald	2000 – 2001
Meg Wolf	2001 – 2002
Michelle Kenney	2002 – 2003
Alexandra V. Rieman	2003 - 2003

II. POSITION DESCRIPTIONS

A. PRESIDENT

Term:

One year, commencing at the Annual Election of Directors and Officers, or until a successor is elected.

Function:

The President is the chief elected officer, representing the entire membership and the best interests of the organization. S/he exercises personal leadership in the motivation of Board Members and Committee Chairs. With the Board s/he establishes goals and objectives for the organization during the term of office, and acts as spokesperson and leader and plays a key part in monitoring and evaluating organizational performance and effectiveness.

Duties and Responsibilities:

- a. Preside at and attend all Board, Special, General and Annual Meetings of the Association.
- b. Ensure that the membership is kept fully informed of the conditions and operations of the Association.
- c. Shall assure all committees are appropriately chaired within 20 days of election. Shall be an Ex-Officio member of all committees. Shall appoint ad hoc committees as needed.
- d. Promote interest and active participation in the Association on the part of the membership and report activities of the Board and Association to members by means of letters, e-mail and publications at least bi-annually and through an annual report at the Annual Meeting.
- e. Act as spokesperson or delegate an appropriate representative to act as spokesperson to the press, legislative bodies, and other organizations, and to otherwise serves as liaison to the community.
- f. Shall be responsible to the Board and, through the Board, to the membership for ensuring that the programs and policies of the Association reflect the needs and aspirations of the membership.

- g. Act as liaison of BCGA to the FSGA Council of Presidents by attending meetings and/or conference calls.
- h. Shall insure that all required corporate reports and notices are completed and filed on a timely basis with all applicable local, state, and federal agencies.
- i. Shall, with the assistance of the Membership Chair, send a welcome letter to all new and renewal members.

B. VICE-PRESIDENT

Term:

One year, commencing at the Annual Election of Directors and Officers, or until a successor is elected.

Function:

The year as Vice-President is intended to prepare and familiarize the person with the activities and responsibilities of the Association and the Office of President. During this year s/he will begin to formulate plans for special activities s/he would like to undertake and directions for Association policy during a term as President, if elected. S/he performs the duties of the President in the absence or disability of the President.

Duties and Responsibilities:

- a. Attend all Board, Special, General and Annual Meetings of the Association, and preside in the absence or disability of the President.
- b. Assist the President in organizational development, including fund-raising, liaison relationships with other associations and societies, and membership recruitment and services.
- c. Be kept informed of actions of the Association and participate in the deliberation of policy questions and course of action.
- d. Perform other duties as may be assigned by the President/Board.
- e. Assist the President in appointing a Chair-Elect for each Standing and Ad-Hoc Committees.

C. SECRETARY

Term:

One year, commencing at the Annual Election of Directors and Officers, or until a successor is elected.

Function:

The secretary shall be responsible for keeping a true and accurate record (minutes) of all proceedings at meetings of the Board of Directors and Members. In addition, the Secretary shall see that all notices are duly given in accordance with the provisions of the By-laws, or as required by law. The Secretary shall act as custodian of the Corporate Records and of the Seal of the Corporation. When authorized by the Board of Directors or by the President, the Secretary shall affix the Seal of the Corporation to any instrument requiring it.

Duties and Responsibilities:

- a. Attend all Board, General, and Annual Meetings of the Association.
- b. Take official minutes of all Board, General and Annual Meeting and distribute them to Board Members and Committee Chairs within ten (10) days following the date of the meeting (this distribution may be via e-mail, fax or regular mail).
- c. Process any follow-up based on minutes.
- d. Write letters regarding awards, thank you, board memos, etc.
- e. Notify the State of Florida and the Internal Revenue Service, after each Annual Election (and any time a change occurs), with a statement showing our current address, telephone number, names, and positions of the Officers and Directors.
- f. Perform other such duties as may be assigned by the President/Board.
- g. Shall create and maintain a list of all Committees, Committee Chairs, and members thereof. A current/revised Committee Roster shall be provided to each director, committee chair and committee member whenever a change occurs.
- h. Shall ensure that each member is duly notified, seven to ten (7-10) days, prior to each meeting (including BOD meetings). This notification shall include the name, address, telephone number, time and directions to the facility.

D. TREASURER

Term:

One year, commencing at the Annual Election of Directors and Officers, or until a successor is elected.

Function:

The Treasurer shall act as custodian of the corporate financial records. The Treasurer shall keep and maintain adequate books of accounts and records for the Association, shall chair the Finance & Budget Committee, shall make such reports to the Board of Directors and membership as may be required by the Board, and shall perform all other acts that are incident to the office of Treasurer.

The Treasurer's principal concern is with finances and is expected to help make decisions on all phases of the Association's program.

Duties and Responsibilities:

- a. Attend all Board, Finance & Budget Committee, General and Annual Meetings of the Association.
- b. Chair the Association's Finance & Budget Committee.
- c. Present a preliminary operating budget 45 days prior to each fiscal year.
- d. Monitor current and proposed Association activities for fiscal soundness and make recommendations to the Board.
- e. Recommend to the Board policies and programs for the development and investment of assets and increase in revenue.
- f. Recommend an independent accountant to the Board to conduct an annual review of the BCGA books.
- g. Present a Financial Statement to each director, within ten (10) days after the end of each month (this distribution may be via e-mail, fax or regular mail), based on the following documents as prepared by the Treasurer:
 - Accounts Payable
 - Accounts Receivable
 - Balance Sheet
 - Profit and Loss
 - Budget

- h. Enforce the following procedures:
 - 1. Recipients of Association funds agree to stay within budgeted amounts (unless over-expenditures are approved by the Board) and agree to document money spent.
 - All bills requiring payment should be submitted within 30 days of encumbrance, and all accounts should be complete by the last day of the fiscal year.
 - All reimbursement requests should be made on the official BCGA Reimbursement Request Form (see Form G).
- j. The Treasurer is responsible for seeing that zero-based budgeting is carried out each year.
- k. Perform other such duties as may be assigned by the President/Board.

III. COMMITTEE DESCRIPTIONS

A. BY-LAWS, POLICIES AND PROCEDURES

Description:

The Bylaws Committee shall be composed of a Chairperson, appointed by the President, and members selected by the Chairperson.

Responsibilities:

The Bylaws Committee shall:

1. Mail, fax, e-mail or otherwise apprise the general membership of the proposed Bylaws changes at least fifteen (15) days prior to the date the vote is to take place.
2. Subsequent to the Annual Business Meeting, revise Bylaws as necessary and submit to the Secretary for distribution to the Board.
3. The Bylaws chairperson, or designee, shall attend all board meetings and make note of any necessary changes in the by-laws.
4. Any changes to existing Bylaws will be noted with deletions ~~struck through~~ and additions underlined.

B. EDUCATION

Description:

The Education Committee shall be composed of a Chairperson, appointed by the President, and members selected by the Chairperson.

Responsibilities:

The Education Committee shall:

1. Explore the possibility of scheduling, tracking and developing workshops or seminars that could be utilized by BCGA for continuing education. Coordinate and schedule the meeting facility and approval for CEU's.
2. Be responsible for reviewing all proffered syllabuses and make recommendations to the Board of Directors for the Association's endorsement(s).
3. Further the education of professional and family guardians.
4. The Education chairperson shall act as liaison with state and local agencies and organizations involved in education affecting guardians.

C. FINANCE AND BUDGET

Description:

The Treasurer shall appoint members of the Finance and Budget Committee. The Treasurer shall be the Chairperson. This Committee reviews expenditures and other matters for consideration by the Board of Directors and the membership.

Responsibilities:

1. Maintain an accurate accounting of the Association's fiscal functions.
2. Prepare an Annual Operating Budget for the Association, to be presented to the Board of Directors at the Annual Meeting (see Procedure IV-D and Form VI-G). This proposed budget should then be voted on and adopted at the first working meeting of the new Board of Directors.
3. Prepare a detailed Annual Report of the Association expenditures, to be presented to the Board of Directors prior to the Annual Meeting.
4. Secure an Annual Comprehensive Review of BCGA fiscal record by an independent accountant, selected by the Board. The independent accountant, within ninety (90) days after the end of the fiscal year, shall complete the review. The findings of the review shall be published in the next issue of the Association's official publication.
5. Coordinate the fund-raising of the Association.

D. LEGISLATIVE

Description:

The Legislative Committee shall be composed of a Chairperson, appointed by the President, and members selected by the Chairperson.

Responsibilities:

1. Use the Association newsletter to inform members of developments in public policy that are of concern to the Association.
2. Submit papers on public policy to The Florida Guardian and other appropriate journals, and encourage such activity among the Association membership (with BOD approval if submitted as a representation of BCGA).
3. Gather, analyze and compile legislative data and present data in the form of position papers for the Association; formulate policy statements, with Board and/or membership approval, for the Association.

4. Determine how the Association can affiliate with appropriate political action groups at state/regional/national levels.

E. MEMBERSHIP

Description:

The Membership Committee shall be composed of a Chairperson, appointed by the President, and members selected by the Chairperson.

Responsibilities:

The Membership Committee shall:

1. Establish and maintain regular communication with active BCGA Members.
2. Communicate any suggestions or program ideas from active Members to the appropriate Committee Chairperson or Board of Directors.
3. Actively seek to increase membership by soliciting new members and encouraging rejoining members.
4. Shall maintain the membership database.

F. MENTORS COMMITTEE

Description:

The Mentors Committee shall be composed of a Chairperson, appointed by the President, and members selected by the Chairperson

Responsibilities:

The Mentors Committee shall:

1. Create and maintain a list of members willing to mentor a new Professional Guardian or a Family Guardian within their areas of expertise.
2. Match a Mentee with the appropriate Mentor.

G. NOMINATING COMMITTEE

Description:

The nominating committee of three (3) members shall be created by the Board of Directors and announced at the first Board of Directors meeting subsequent to the Annual Election. The President shall appoint one of the members, who shall be the Chairperson; one shall be elected by the Board from the Board; and one shall be elected by the Board from the general membership. An owner, officer, director, or employee of the same business entity may not serve on the nominating committee if a similar individual is a nominee for the Board or serving on the Board.

Responsibilities:

1. Nominations for Directors positions may be submitted by the general membership, in writing, to the Nominating Committee at least sixty (60) days prior to the Annual Election. All nominees are requested to give the Chairperson of the Nominating Committee a brief written resume. Condensed versions of the resumes shall be published in the official Corporation publication not less than thirty (30) days prior to the election.
2. All nominees that notify the Nominating Committee of their desire to run for Director, solicited or non-solicited, shall be included on the slate for election of Directors.
3. The Nominating Committee shall, on or before thirty (30) days before the scheduled election, present to the Board a list of nominees, along with a brief resume.
4. Vacancies for Board positions may be filled at any meeting of the Board of Directors to serve the duration of the vacant term, assuming the appointee meets all the necessary criteria.

H. PUBLIC RELATIONS

Description:

The Public Relations Committee shall be composed of a Chairperson, appointed by the President, and members selected by the Chairperson.

Responsibilities:

The Public Relations Committee shall:

1. Coordinate and establish communications with local media.
2. Provide appropriate articles for inclusion in the BCGA newsletter.

IV. POLICIES AND PROCEDURES

D. PREPARATION OF ANNUAL BUDGET

The Treasurer in conjunction with the Finance Committee prepares a proposed budget for the new fiscal year.

The Treasurer shall provide a "Budget vs. Actual" report for the previous fiscal year and the year-to-date figures (i.e. to prepare the 1998-1999 budget, use the 1996-1997 report, and the 10/97 - 8/98 year-to date report.)

The Annual Operating Budget should have the previous year's budget listed before the current year's budget beside the proposed budget amount (see Form # VI-G).

The budget shall be presented at the annual meeting, and then refined and voted upon at the first board meeting in the new fiscal year.

V. APPENDICES

APPENDIX B.

REIMBURSEMENT POLICY

I. GENERAL POLICY

When funds are available, the Association reimburses Members for all previously budgeted legitimate expenses incurred for approved Association business. Legitimate travel expenses are reimbursed for transportation, hotel and meals, which fall within the limits, established by this policy.

II. BOARD TRAVEL

Officer, Board Member or Committee Chair travel must be approved prior to travel. Approval must be received in advance (in letter form) and approved by the President and Treasurer.

III. RATE OF REIMBURSEMENT

1. Transportation:

- a. Air Travel: The Association will reimburse at most air coach service. First class travel is not authorized. Whenever possible, special or economy fares must be used. Reimbursement for a regular coach fare will not be made when ample time to arrange for special rates was allowed.

If a member cannot take advantage of an economy fare because s/he makes additional stops enroute to the Association's meeting, reimbursement will be available only for the round trip economy fare.

- b. Bus and Rail Travel: The Association will reimburse for the exact cost of the bus or rail ticket up to but not exceeding the coach or special air fare (if time is available to secure the latter) for the same trip.
- c. Ground Transportation: Public transit and taxi costs are fully reimbursed at exact costs. Receipts for all taxi costs are encouraged. Whenever possible, airport buses or public transportation should be used rather than taxis, particularly when airports are distant from final destination.
- d. Automobile Travel: The Association will reimburse travel by private automobile at the approved per mile government rate, up to but not exceeding, the coach or special air fare for the same trip.

NOTE: Reimbursement shall be for the least expensive option.

2. Per Diem:
 - a. Room: The Association will reimburse at the actual cost of a hotel single room, up to but not exceeding \$75 day. For those meetings arranged by BCGA staff, the reimbursement for hotel will not exceed the special rate arranged by BCGA.
 - b. Meals: The Association will reimburse up to but not exceeding \$35 a day for three meals; less if not traveling a full day.
3. Receipts:

Requests for reimbursements (for individual expenditures) must be documented by a receipt, including receipts for transportation tickets, taxis, and rooms. Whenever possible, receipts should be submitted for any size reimbursement.
4. Time Limit:

All requests for reimbursement should be submitted promptly. Requests not made within 30 days of completion of travel will be forfeited, unless there is prior approval by the President/Treasurer.
5. Other Expenses:

Requests for reimbursements for copies, long distance phone calls and any other legitimate Association business must be documented and should include copies of any long distance bills generated along with explanation of calls. All expenditures must have prior approval and shall not exceed any reasonable amount.

APPENDIX F.

BCGA CHART OF ACCOUNTS (Minimum)

INCOME ACCOUNTS

Advertising/Newsletter: This includes all income from newsletter sponsors and advertisers. If there were a sponsor for the Membership Directory, it would also be posted in this category.

Associates Night: This includes all income from our Associates Night.

Continuing Education: This includes all income from our all day CEU programs, seminars and membership meetings where non-members are charged for CEU's.

Membership Dues: This includes all income generated by member dues for the Broward County Guardianship Association.

Miscellaneous Income: This would be a general revenue area for everything else. For example, if our mailing list were sold to another organization, the revenues received would be posted in this category. If income from selling the list grew to be significant, it would need its own category.

State Dues: This includes fees that we collect for, and pay to FSGA or other local chapters

Website Income: This includes fees charged for providing a website link to a members website.

EXPENSE ACCOUNTS

- Bank Charges: Any fees or expenses incurred from the Bank (like the purchase of new checks).
- Continuing Education: Any expenses related to providing continuing education.
- Membership Directory: All expenses directly attributable to the Membership Directory would be expensed here.
- Miscellaneous: This would be a general expense for everything else. Subscriptions or dues to other organizations would be posted to this category.
- Newsletter: All expenses directly attributable to the newsletter would be posted here. For examples, the expense to have our logo put on disk will be posted to the newsletter. The postage to mail the newsletter would be posted here rather than to the more general “postage” category.
- Office Supplies: Purchase of special supplies such as file folders, envelopes, etc. are posted here.
- Postage & Delivery: All general postage and delivery charges not directly attributable to another category, such as newsletter or conference, would be posted here.
- Printing & Copies: All printing and copy expenses not directly attributable to another category would be posted here. Example: printing of letterhead would be posted here, but printing of the newsletter would be posted to “newsletter.” Likewise, printing of membership materials would be posted to “membership.”
- Professional Service: This category would cover the management firm fees paid to a Professional Administrator, as well as any other special contract professional fees. For example, if an audit were conducted, the expense would be posted here.
- State Dues: All dues received by BCGA on behalf of FSGA or another chapter are reimbursed 100% to FSGA or the chapter. These payments are posted to this account. It offsets the income account called “State Dues” in the Income Account.
- State Filing Fees: This would include the annual fee to be registered with the State of Florida.

Telephone & Fax: All telephone and fax charges not directly attributable to another category would be posted to this category.

Website: This would include the renewals for our domain name and website hosting.

VI. FORMS AND EXAMPLES

C. BOARD OF DIRECTORS MEETING AGENDA

AGENDA BOARD OF DIRECTORS MEETING Time of Meeting Day and Date of Meeting Location

1. Call to Order - President
(Determine there is a quorum present.)
2. Approval of Minutes (Exhibit A)
Secretary – (Last meeting date)
3. Financial Reports (Exhibits B)
Treasurer
 - a. Most recent financial statement
4. Committee Reports
 - a. Bylaws, Policies and Procedures
 - b. Education
 - c. Finance and Budget
 - d. Legislative Committee
 - e. Membership
 - f. Mentors
 - g. Nominating
 - h. Public Relations
 1. News Letter
 2. Website Liaison
5. President's Business
6. Old Business
(Anything that needs reporting)
7. New Business
(Anything that needs reporting)
8. Announcements
UPCOMING EVENT SCHEDULE
(Future Board meeting date, time and location.)
9. Adjournment (President will announce the time)

D. GENERAL MEETING AGENDA

AGENDA
BCGA REGULAR MEMBERSHIP MEETING
Time of Meeting
Day and Date of Meeting
Location

1. Call to Order - President
(Determine there is a quorum present.)
2. Introduction of host facility representative & presentation of Certificate of Appreciation.
3. Self-introduction of member's present.
4. President introduces speakers/purpose of meeting.
5. General questions/comments from members.
6. Announcements (time, date, and place for next BOD & regular membership meeting(s))
7. Adjournment.

E. MINUTES FORMAT

BOARD OF DIRECTORS MEETING

Date of Meeting

Location

Directors present – Listing of Board members present

Directors absent – Listing of Board members absent

Guests Present – Guests, chairpersons, etc., present

President - Determines there is a quorum present.

1. Meeting Called to Order (at specific time)
2. Minutes approved from previous board meeting(s)
3. Financial report, discussion and approval
4. Committee Reports (list committees and their reports, if any)
 - a. Bylaws, Policies and Procedures
 - b. Education
 - c. Finance and Budget
 - d. Legislative
 - e. Membership
 - f. Mentor
 - g. Nominating
 - h. Public Relations
 - i. Website Liaison

(The meeting adjourned at specific time and the meeting reconvened at specific time)

5. President's Business
6. Old Business
7. New Business
8. Announcements - UPCOMING EVENT SCHEDULE
(Future Board meeting date, time and location.)
9. Adjournment – (The meeting was adjourned at specific time by President)

Your printed name,
Secretary

G. REIMBURSEMENT REQUEST FORM

BROWARD COUNTY GUARDIANSHIP ASSOCIATION, INC.

Expense Reimbursement Form

Submitted to President for Review prior to issuance of checks

Payee Name _____

Submitted By _____

Address _____

City/State/Zip _____

Description
of function _____

Expenses Incurred**

Travel: Airlines (Coach Fare) _____
Automobile (miles driven _____ @ \$0.36 per mile) _____

Lodging & Tips _____

Meals _____

Taxis _____

Parking Fees _____

Other:	Account Name	Description	Amount
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Total to be reimbursed: =====

** Please enclose supporting documents for airfare, lodging, and other expenses.

SUBMITTER SIGNATURE

DATE

Approved – Disapproved

PRESIDENT-SIGNATURE

DATE

H. ANNUAL BUDGET FORM – Annual Operating Budget (SAMPLE)

1 September _____ Through 31 August _____
 (Year) (Year)

Line Item	Previous Year's Budget Amount	Current Year's Budget Amount	Proposed Budget Amount
INCOME			
Advertising/Newsletter	_____	_____	_____
Associates Night	_____	_____	_____
Continuing Education	_____	_____	_____
Membership Dues	_____	_____	_____
Miscellaneous Income	_____	_____	_____
State Dues	_____	_____	_____
Website Income	_____	_____	_____
 Total Income:	 _____	 _____	 _____

EXPENSES			
Advertising	_____	_____	_____
Associates Night	_____	_____	_____
Bank Charges	_____	_____	_____
Continuing Education	_____	_____	_____
Directors Liability Insurance	_____	_____	_____
Membership Directory	_____	_____	_____
Miscellaneous	_____	_____	_____
Newsletter	_____	_____	_____
Office Supplies	_____	_____	_____
Post Office Box	_____	_____	_____
Postage & Delivery	_____	_____	_____
Professional Service	_____	_____	_____
State Dues	_____	_____	_____
State Filing Fees	_____	_____	_____
Telephone & Fax	_____	_____	_____
Website	_____	_____	_____
 Total Expense:	 _____	 _____	 _____

NET INCOME:	_____	_____	_____