

Chapter Name:

These are the items that should be included in the Chapter's financial packet to the NYS Treasurer.

The financial packet can be emailed to [treasurer@nydar.org](mailto:treasurer@nydar.org) (preferred) or mailed to Kristen Moore, 3260 E Lydius St., Schenectady, NY 12303.

Example documents are included.

Email [treasurer@nydar.org](mailto:treasurer@nydar.org) if there are questions.

	Year End Financial Statement	
	Audit Committee Report	
	Accepted 990N postcard or copy of 990 EZ or 990	Mandatory
	NYS CHAR filing	Optional – only send it if your Chapter is filing; Depending on Chapter's circumstances, NYS Charities Bureau has confirmed that Chapters can opt out from filing because we are a membership organization.

Year End Financial Summary – This can be the same report your Treasurer presents at your Chapter’s annual meeting. It can be a summary in any format such as Word, Excel, Quickbooks as long as it represents the Chapter’s fiscal year.

Year End Financial Summary Sample

Chapter Name  
Chapter Code  
Annual Report Year Range

Revenue

National Dues	\$XXX
State Dues	\$XXX
Chapter Dues	\$XXX
Donations	\$XXX

Expenses

National Dues	\$XXX
State Dues	\$XXX
National Contribution	\$XXX
President General’s Project	\$XXX
Awards	\$XXX

Balance \$XXX

Checking Account Balance	\$XXX
Savings Account Balance	\$XXX

Investments (CD’s, stock funds, etc.) \$XXX

Grand Total \$XXX

As reported by Chapter Treasurer \_\_\_\_\_

Audit Committee Report Example

Report of the Audit Committee

Chapter Name

Chapter Code

Date \_\_\_\_\_

The members of the Audit Committee have examined the records of the Treasurer of the \_\_\_\_Chapter Name\_\_\_\_, namely the account registers, bank statements and supporting documentation. We find the records to be in good order and their contents appear reasonable.

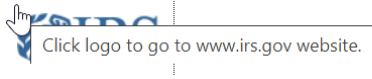
We have also reviewed the financial statements for the \_\_\_\_Chapter Name\_\_\_\_ which summarize the records referred to above, for the year ended \_\_\_\_\_. These statements appear to fairly represent the financial position and the revenue and expenses for the organization.

Signed,

Signatures of Audit Committee

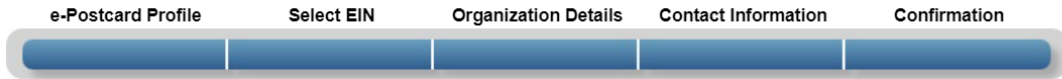
# 990N Postcard Sample

Make sure to send the one with the Filing Status: Accepted



## Confirmation

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Your Form 990-N(e-Postcard) has been submitted to the IRS

- **Organization Name:** [REDACTED]
- **EIN:** [REDACTED]
- **Tax Year:** 2020
- **Tax Year Start Date:** 01-01-2020
- **Tax Year End Date:** 12-31-2020
- **Submission ID:** 10065520211304617728
- **Filing Status Date:** 05-10-2021
- **Filing Status:** Accepted



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