

**Finance**  
**Program Action Plan – 2016-2017**  
**Thelma Butler, Chairman**

**Objective:** Provide for financial stability by setting goals through an Annual Budget Process.

- Create a three member Finance Committee – include Treasurer.
- Conduct a Budget Planning meeting prior to fiscal year end – include Unit officers.
- Review Unit’s current financial status.
- Review progress status of the Unit long range goals.
- Review ALA Unit obligations for Veterans Affairs & Rehabilitation, Poppy promotion, American Legion Auxiliary Girls State, etc.
- Review Unit membership numbers and related dues income.
- Review others sources of revenue: donations, events, breakfasts, dinners, etc.
- On a 12 month calendar, plot out when the Unit anticipates revenue and expenditures will occur.
- **Compare** the Unit’s total estimated revenue versus the Unit’s total estimated expenses.
- Determine which areas need further consideration to accomplish your long range goals.
- Try to create a positive bottom line.

**Remember:** Budgets are just a guide.

The Unit membership **must** vote on the adoption of the annual budget.

**Tax Filing Process**

**Objective:** Be compliant with the IRS regulations to maintain nonprofit exempt status annually.

- **Indiana Department of Revenue**
- Units need to file Form NP 20.
- Be sure to file by the 15<sup>th</sup> day of the 5<sup>th</sup> month following the Unit’s fiscal year end.
- **Internal Revenue Service**
- 990 N - filed only if gross receipts are over \$50,000.
- Otherwise, go online and file an e-postcard – [www.irs.gov](http://www.irs.gov).
- If you need assistance, review the IRS User Guide at [www.irs.gov](http://www.irs.gov).
- Be sure to keep the log in information (name, address and password) for future year filings.

**Always Keep in Mind:**  
**The American Legion Auxiliary has “Pride in Giving Service!”**

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**Department Finance Committee Members:**

**Florence Briggs, Karen Lowe, Rosey Newman and Janet Barnaby**