

Sample Parish Finance Council Annual Report

Instructions for submission:

The annual report submitted to the parish's Dean must take this or a similar form and it must address at least those areas contained in this sample.

Please submit the parish report on parish letterhead.

Sample text is shown below. Please modify the text as needed to accurately report your information.

Sample Text:

July nn, (year)

Dear Rev. (Dean) ,

We are pleased to submit this report of the annual activities of the Finance Council of (Parish) for the Fiscal Year ended June 30, (year) .

The names, terms and qualifications of our Finance Council members are as follows:
Name of Member, Current Term (begins/ends), Qualifications

The dates and attendance numbers (Finance Council members) of our meetings during the Fiscal Year being reported were as follows:

Meeting Date Attendance Meeting Date Attendance

Our pastor attended all meetings.

We approved an operating budget for the past Fiscal Year ended June 30, ____ and the coming Fiscal Year ending June 30, _____.

We reviewed interim financial statements as a group at least quarterly. Those statements that included (at a minimum) the Balance Sheet and the actual Statement of Activities (revenues & expenses) compared to budget.

A financial review was/was not performed in the parish during the past Fiscal Year.
(If a financial review was performed, please note when it was completed and whether the
finance council was given access to the report)

Additionally, we have operated our Council in accord with the Norms issued by the
Bishop of Phoenix as set forth in the Norms of Parish Finance Councils of the Diocese of
Phoenix.

Although we may not have agreed with the pastor on all finance related decisions
affecting the parish, we feel that our advice was listened to and that we received the
information from the pastor and parish staff that we needed in order to give informed
counsel.

Respectfully submitted,

Finance Council Chair

Member

Member

Member

Member

Member

Member

Acknowledged,

Pastor

cc: Joseph C. Anderson, CFO
Roman Catholic Diocese of Phoenix