

2.6 – Role of Treasurer	Original Date/Revisions:	3/2015; 07/2017; 1/2020; 6/2021
	Policy Group:	Board of Directors
	Next Review:	04/2023
Purpose:	Describe the role of the SPN Treasurer.	
Policy:	The SPN Treasurer serves as a member of the Board of Directors and is elected by the membership as stated in the bylaws.	
Guidelines:		
<ol style="list-style-type: none"> 1. Monitors the financial status of the Society through review of monthly financial reports, invoices, financial dashboards, as well as year-end reports from the CPA and investment advisors. 2. Presents reports to the President and Board at face-to-face Board meetings (or more often as requested by the President). 3. Ability to access and read excel files. 4. Serves as a member of the Executive Finance and Executive Committees. 5. Actively participates at all meetings regarding the Society’s financial business. 6. In conjunction with the National Office staff, develops and presents an annual budget to the Board. <ol style="list-style-type: none"> a. Considers the financial requirements of basic policies and programs when developing the budget. b. Ensures expenditures match the mission and strategic plan of the Society. 7. Reports to the membership on the financial status of the Society at the Annual Business Meeting. 8. Ensures that accounts are audited annually and taxes are filed by a certified public accountant approved by the Board. 9. Monitors the annual submission of the chapters’ IRS Form 990, managed by the SPN National Office. 10. Participates in an orientation with staff, accountant, and investment advisor prior to the first meeting of the Board following the Annual Conference. 11. Provides review of Investment Consultant and makes recommendations as needed. 12. Recommends changes in fiscal policy; reviews and makes recommendations on role description. 13. Completes other duties as assigned by the President or Board of Directors. 14. Assumes responsibilities as designated in policies 2.1. 		