

Financial Team

Date: 8/21/24

Discussion:

- Creating a handbook document that outlines and organizes financials - setting up health insurance, debit cards, here are our contacts at each institution, a one place where someone could go to know how to pick this up if any of the team members were to not be available for whatever reason.
- Picking officer positions -- for 2025 -- JP to take a sabbatical from "secretary" position
- Can we get Dan R back on team?
- Document processes - so we can figure out where we can delegate responsibilities.
- what can we set up electronically? Can we get checks out of QuickBooks?
- We need to do a better job of dividing and conquering

JP to Do:

- Follow up w/ Kindred on Electronic payments for Staff.
- FCMM Retirement
- JP to follow up w/ Kindred on the onboarding document since it's fresh with Stephen.
- Ask Sherburne State Bank who are our current signers?

Andi to Do:

- Pull examples of church finance policies and handbooks to look through.

Kindred to Do:

- Document the process that he went through with onboarding Stephen so we have an onboarding handbook (JP to talk to Kindred about)

Joe to Do:

- Finalize Charter w/ the Elders
- Discuss w/ Elders to be comfortable if Andi were the signer - to take some off JPs plate.
- Joe to do financial update video