Logo

Description automatically generated

**Officer Transition Check List**

|  |  |  |  |
| --- | --- | --- | --- |
| **Section Item** | **Responsible** | **Date** | **Notes** |
| **Section Records** | | | |
| Financial Records |  |  |  |
| Past Tax Returns |  |  |  |
| Membership Records |  |  |  |
| Minutes |  |  |  |
| Annual Reports Submitted |  |  |  |
| Financial Reports Submitted |  |  |  |
| Current Bylaws |  |  |  |
| Articles of Incorporation |  |  |  |
| Budget |  |  |  |
| Federal Tax number(s) |  |  |  |
| Tax exemption determination letter and certificate |  |  |  |
| Section policies and procedures\* |  |  |  |
| Bank information for dues transfer (Bill.com login information) Notification Email |  |  |  |
| Update bank signature cards |  |  |  |
| Copies of current/pending vendor contracts |  |  |  |
| **Section Governance/Meetings** | | | |
| Updated leadership roster |  |  |  |
| List of meetings/events and volunteer roles |  |  |  |
| Calendar of upcoming meetings/events |  |  |  |
| Location of chapter logos |  |  |  |
| Templates for newsletters/member communication |  |  |  |
| Marketing lists for meeting and events |  |  |  |
| List of Sponsors |  |  |  |
| List of pending deadlines |  |  |  |
| History of meetings and events from past three years (date, locations, rates, financial, attendance numbers) |  |  |  |
| Membership applications |  |  |  |
| Membership processes |  |  |  |