



LOUISIANA STATE FINANCIAL SECRETARIES ASSOCIATION

FINANCIAL SECRETARY'S HANDBOOK SUPPLEMENT

This supplement is designed to include frequent and infrequently asked questions as well as to identify common problems and their solutions.

A copy of the Association's By-Laws needs to be attached to this supplement.

Form 100's (Membership Document):

- Submit the first copy of the Form 100 to the Supreme Council and the second copy to your Insurance General Agent for all transactions except when a "New Member" applies for Annuity for himself and/or his spouse. On these occasions, both copies are to be submitted to the Insurance Agent (with a check made out to Knights of Columbus Insurance) after ensuring that the backs of these pages have been completed.
- Submit all member data changes as soon as possible.
- Dispose of all "old" Form 100's (those with a Withdrawal checkbox option).
- "Tax Identification Number" boxes have replaced the "Social Security Number" boxes.

Form 1845's (Notice of Intent to Suspend):

- Only dues billing (not YEP, levies, etc.) can be shown on this form, and you can only list the current and immediate past quarters.
- Include current phone numbers and addresses only. Leave blanks where you don't have current info, but if you leave the phone number blank explain how the member was contacted or include a note stating you were unable to contact the member due to lack of contact information.
- The State Council's Membership Conservation Form must be attached to the copy submitted to the State Deputy and District Deputy.

Membership Conservation Reporting Form:

- The Louisiana State Council requires this form be submitted with the Form 1845. While this form is the responsibility of your council's retention committee, you will need to provide some of the required information. This form is on the State Council's website and can be found here:
<http://www.louisianakc.org/forms/Membership-Conservation-Reporting-Form.pdf>.

Withdrawals:

- Supreme will only accept a letter written and signed by the member who chooses to withdraw from the order. The member may send his letter directly to the Supreme Council or to you for forwarding. Form letters, check box options on billing notices, etc. will not be accepted by Supreme. If a member refuses to write and submit this letter himself, the FS should follow established suspension procedures.
- A member must be current in his dues to be eligible for a withdrawal.

Semi-Annual Council Audit Report:

- This report is to be completed by the council's Grand Knight and Trustees, not the Financial Secretary and/or Treasurer. The FS should provide the documentation needed and be available to answer questions only.

Un-contactable Members:

- A new FS may inherit members who haven't paid dues in years and do not have current contact information (and may even be deceased). Possible ways of locating these members include name-search websites, contacting your General Agent, and asking some of your long-time council members about them. These members may be able to provide you with a relative's name who can provide further information.

Semi-Annual Membership Roster:

- Review this for changes to mailing addresses and for members whose mail is being returned to the Supreme Council.
- Review for members who are currently or soon will be eligible for Honorary and Honorary Life Membership status.

Monthly Council Statement:

- Review these for change of address notifications, insurance purchases and cancellations, etc.

Form 185 (Report of Officers):

- FS must complete and submit a copy of the Form 185 identifying those council officers elected for the year. This report needs to be submitted as soon as possible after the election, and no later than June 30.

Suspension of a Convicted Felon:

- Supreme Council by-laws require suspension of a convicted felon and that these procedures need to be followed carefully. You should get a legal copy of the conviction from the Clerk of Court's office for both your and your council's protection.

Fourth Degree Member Deaths:

- Notify the Assembly when a Fourth Degree Member of your council dies.