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## Section Five – Local Court

## Local Court Officers and Duties

This section addresses the duties of the Local Court Officers as well as information regarding meetings. Information regarding eligibility, term of office, and succession may be found in the Bylaws.

**I.** **The Regent shall** (See Attachments 1, 2, 3, 4 - Tips for Regents, Sample Agenda without Script, Script for Local Court Meeting, and Suggested Set Up for Court Room)

A. Preside at all meetings

B. Prepare agenda for all meetings

C. Be responsible for transaction of all business of Local Court

D. Obtain permission by motion of the court before any expenditure that is not included in the approved budget or the approved standing rules.

E. Follow rules of debate

F. Enforce rules of Local Court (See Attachments 5, 6 - Standing Rules and Standing Rules Outline)

G. Enforce Bylaws of THE ORDER

H. Interact with District Deputy/State Representative and State Officers

I. Ensure the participation in Circle of Love program

J. Ensure financial reviews are completed on time every six months (for the period ending March 31 due April 15 and ending September 30 due October 15)

K. Confer with the District Deputy/State Representative to select a date for the Financial Review. Ensure appropriate members are present at Financial Review (Regent, Vice Regent, Recording Secretary, Financial Secretary, Treasurer, and Financial Review Committee) along with appropriate material (See Attachments 7 , 8, 9 – Financial Review Guidelines, Checklist for Financial Review, and Financial Review Form)

L. Ensure all books, files, etc. have been turned over to newly elected officers and appointed chairmen.

M. Appoint Circle of Love Chairmen, Standing Rules Chairman, Special Chairmen, and Committees (See Attachments 10, 11 - Checklist for Regents and Committees)

1. Standing Committees are those noted in the Circle of Love, Publicity/Public Relations and Financial Review (3 members) etc.

2. Special Committees are those committees set up to handle specific tasks such as Membership, Telephone, Sunshine, Bulletin, Budget, etc.

3. Train Chairmen

N. Appoint a Ceremonial Coordinator who shall be responsible for the ceremonial activities of the Court.

O. Ensure Court officers have a list of all Court chairmen and committee members.

P. Ensure appropriate signatures are on file at bank. (current officers)

Q. Upon election, review checklist for Regents. (See Attachment 10 - Checklist for Regents)

R. Serve as an ex-officio member of all committees, EXCEPT NOMINATING COMMITTEE. (ex-officio member information is taken from Robert's Rules of Order Newly Revised)

S. Represent the Court at meetings of the State Court. Expenses may be paid by the Local Court.

T. Presents all bills for payment, and countersigns all Local Court checks written and signed by the Treasurer

U. Sign all correspondence of the Local Court unless authority is designated to the Recording Secretary.

V. After all attempts to retain a member have been exhausted, has final authority to terminate membership.

W. Immediately upon election, complete form 8822 and send to IRS (See Attachment 12 - Change of address for IRS)

X. Immediately upon election, ensure that the List of New Officers Form is sent to the National Office. (See Attachment 13 - New Officer List)

Y. Perform other such duties as the laws of THE ORDER require.

**II. The Vice Regent shall**

A. Assist Regent when requested.

B. Perform other such duties as may be designated by the Regent such as

1. Membership Chairman

2. Standing Rules Committee Chairman

**III. Recording Secretary shall**

A. Keep accurate proceedings of all meetings (See Attachments 14, 15 – Content of Minutes, Sample of Minutes)

1. Have the following items at every meeting:

   a. Minutes Book

   b. Minutes of previous meeting

   c. Agenda for meeting

   d. Copy of National Bylaws

   e. List of all Committees

   f. Copy of Court's Standing Rules

B. Reads all bills at the meeting

C. Conduct correspondence of Local Court, except as specified under the duties of the Financial Secretary.

D. Perform other such duties as may be designated by the Regent.

**IV. Financial Secretary shall**

A. Receive and Transmit Monies. (See attachment 16 – Flow Chart of Funds)

1. Receive ALL MONIES for court

2. Issue receipts for all monies received regardless of whether it is cash or check.

3. Post receipts in cash book making proper notations for identification

4. Post dues receipts on membership card if used

5. Total receipts in cash book and transmit to Treasurer

6. Count money with the Treasurer

7. Receive receipt from Treasurer for monies transmitted. Amount of money and source should be noted on back of receipt (e.g. Dues - $50, Fundraiser - $100 etc.)

8. File receipts from Treasurer.

9. Post each member's account information from the cash book to the individual page in membership book. Note: It is recommended that member's ID number be entered on each member's page along with address and date she joined

10. Keep an account of all dues paid

11. Send dues notices to those members whose dues are not current

12. Notify Regent regarding members who have dues in arrears. **Note: No officer has the right to terminate members from the rolls except the Regent**

13. Prepare a list of all members in arrears on dues on or before March 1 of the election year and give a copy of same to the Regent. (A delinquent member shall not be entitled to nomination for office or to vote at the election unless all arrears are paid by the first meeting in March.)

B. Report changes in membership. (See Attachments 17, 18, 19, 20, 21, 22 – Application for Membership, Application for Renewal, Application for Transfer, Application for Dual Membership, Deletion Form, and Correction of Information Form). All forms maybe be sent to the National Office electronically.

1. Send forms according to instructions.

a. Additions

(1) Application Form

(2) Renewal Form

(3) Transfer Form

(a) Upon request from member for a transfer:
(i) Financial Secretary completes appropriate portion of form and signs form along with Regent
(ii) Financial Secretary gives form to member requesting transfer
(iii) Financial Secretary sends deletion form to State and National

(b) Member requesting transfer

(i) Completes appropriate section of form
(ii) Gives to Regent of new court

(c) Regent of new court must sign the Transfer and send it to the National Office to complete the transfer

(3) Dual Membership

(a) Consult bylaws for requirements for Dual Membership

**Reminder: Transfer forms are valid for only ninety (90) days from issue. Once transfer has expired, previous membership has lapsed, and status becomes that of a resigned member. Member can join again as a "Renewal."**

(4) Deletions

(a) Complete a Deletion form when removing a member from your rolls.
(i) Death of member
(ii) Resignation upon request by member
(iii) Forfeiture due to non-payment of dues

(b) Prior to deleting a member for non-payment of dues, member should be contacted in person to attempt to retain the member. No member should be deleted without written notification.

(6) Correction Forms

(a) Complete and send to National Office any name or address changes of members.

(b) Corrections may also be submitted by email to the National Office.

(c) Notify National Office and State Regent of the names and addresses of Local Court officers immediately following election. (See Attachment 13 – New Officer List)

C. Order Supplies

1. All supplies, jewelry, robes, banners, etc. are ordered from the National Office.

D. Reconcile Court Membership Records with National Records

1. Upon receipt of bill for National dues, Regent should give attached information relating to all changes in membership for financial review period to Financial Secretary.

2. Financial Secretary should compare list with Court membership book to ensure the two agree.

3. If discrepancies occur, pay as billed and then contact National Office.

4. Periodically request a membership roster from the National Office to compare with Court records for accuracy and address any discrepancies.

**V. The Treasurer shall**

A. Receive all monies from Financial Secretary only.

B. Give receipt to Financial Secretary for all monies given to her.

C. Pay all bills with approval of Court. **Reminder: Approval is not required from the Court to pay monies assessed by or owed to the National Office and State Court.**

D. Keep an itemized account of all receipts and disbursements.

E. Present a Treasurer's Report at regular meeting each month and give copies to the Regent, to the Recording Secretary for the minutes, and retain one for the Treasurer's Book. (See Attachment 23 – Sample of Treasurer's Report)

F. Make bank deposits immediately. (Deposit slips should be in duplicate.)

G. Enter deposits in check book.

H. Write checks to pay bills as presented from Regent immediately after close of meeting. Always indicate what the check is for on lower left-hand corner of check.

I. Mail or distribute checks.

J. Countersign checks with Regent. All officers' signatures must be on bank signature card for signing Court checks in case someone is not available. All checks require **two signatures**. (CDA requirement.)

K. Balance check book and account book and reconcile bank statement monthly.

L. Serve on the Budget Committee. (See Attachment 24 – Sample Local Court Budget)

M. Assist with a semi-annual report of finances for the six-month period ending March 31 and September 30 which shall be completed by the Local Court Financial Review Committee and submitted to the National Office, with a copy to the State Regent and the State Secretary. The report shall be on forms furnished by the National Office and submitted no later than April 30 and October 31. (See Attachments 7, 8, 9 – Financial Review Guidelines, Checklist for Financial Review, Financial Review)

## VI. Spiritual Advisor

A. Court Chaplain, deacon, religious or another clergy

1. Serves at the request of Regent

2. Conducts religious exercises of Court

3. Advises Local Regent on spiritual matters

4. Should be consulted regarding appropriateness of speakers and subjects at Court meetings or public gatherings

## VII. Retention of Records

The period of time for which records of a Local Court must be kept varies depending on the type of document. (See Attachment 25 – Retention of Records) Courts must be aware of these guidelines and retain records accordingly.

Before the meeting the Regent should

A. Prepare agenda in advance. (See Attachment 2 – Local Court Agenda without Script) Copies should be given to at least the Vice Regent, Recording Secretary, Chaplain and Parliamentarian. If possible, give a copy to all attendees.

   1. Have the following at all meetings

      a. Gavel

      b. Newly Revised Tools of the Trade

      c. Agenda

      d. All correspondence sent to Court

      e. Court's Standing Rules

      f. Court budget

      g. National Bylaws

      h. Note pad and pencil

   2. Review all correspondence and highlight information for Recording Secretary to read.

   3. Review and highlight all National and State correspondence that has to be read.

   4. Make sure room arrangement is set up. (See Attachment 4 – Suggested Court Room Set Up)

B. Take all correspondence received for the Court to meeting. Remember, the Court members have the right to hear /see all correspondence.

C. Keep Vice Regent fully informed on status of Court and activities at all times.

D. Call meeting to order on time. A quorum is required. (5 members and 3 officers = quorum of 8)

   1. Follow prepared agenda; do not attempt to preside without agenda.

   2. Speak clearly and loudly – be relaxed and don't rush.

   3. Encourage participation by members; don't allow a few members to monopolize discussion.

4. Remain in control of the meeting; keep discussion on subject being discussed.

5. Recognize all members wishing to speak.

6. State and take the vote on all motions which have been correctly presented and announce the results of the vote.

7. Remain impartial at meetings.

8. Ask Vice Regent to preside when expressing an opinion on a subject until a vote has been taken. However, it is not wise to do this too often. Note: If officers are well-informed, they should be able to clarify issues.

9. Presiding Officer always refers to herself as the "Chair" or "Your Regent," never "I."

10. Countersign all Court checks written and signed by the Court Treasurer.

11. Remember that the Regent is only an ex-officio member when attending committee meetings. She should not attempt to chair the meeting.

12. Have confidence in chairmen and committee members. If something doesn't work, never say, "I told you it wouldn't work!" Be positive.

13. Interact with District Deputy/State Representative on a regular basis.

14. Maintain a close relationship with Court Chaplain/Spiritual Advisor. Remember, check in advance for availability for special activities, such as Reception of New Members or Installation of Court Officers.

15. Be certain Court has a sufficient supply of all necessary materials to run a Court. (See Supply list sent from National and on the Web site www.catholicdaughters.org)

16. Work closely with Financial Secretary regarding dues. (Make personal contact with members whose dues are delinquent, etc.)

17. Ensure all correspondence of Court contains Court name and number.

**Sec. 5 – Attachment 2**
**Local Court Agenda without Script**

**Opening Ceremonies** (the Regent should stand when addressing the court)
Regent calls the meeting to order (Use the gavel – one rap)
Opening prayer led by___ (3 raps or "Please stand.")
Pledge of Allegiance to the Flag of the United States of America
Opening Ode – Optional but nice
(If there are new members, they can be given the oath at this time.)
Welcome everyone especially visitors and/or new members, transfers, etc.
Guest speaker (if you have one) is introduced and speaks at this time.

**Silent Roll Call of Officers** by the Recording Secretary to put into the minutes. A quorum must be present to conduct business – eight members, at least 3 officers.

**Reading of the Minutes** – The Recording Secretary stands and addresses the regent when reading the minutes. The regent sits. A copy is given to the regent – it is nice if all officers have a copy. Regent will ask if there are any corrections to the minutes. If there are no corrections, the minutes stand approved as read. If there are corrections, corrections are written in the margins of the minutes. Minutes are approved as corrected. (Simple typos may be corrected electronically.)

**Reading of Correspondence –** The Recording Secretary stands and reads the correspondence. The Vice-regent reads the correspondence from State and National.

**Treasurer's Report** - Treasurer stands, addresses the Regent and gives the report. A copy is given to the regent and to the secretary so that the copy can be filed with the minutes.

**Reading of the Bills by the Secretary –** Read the bills for approval, and court votes to pay or not to pay the bill. If the budget covers the bill and approval to pay budgeted items is in the standing rules, give the bill to the Treasurer to pay along with the bills that are approved at the meeting. Still needs to be noted in the minutes that bill was paid.

**Reports of Chairmen** - Each chairman stands and addresses the regent to give the report. Only call on the chairmen who are prepared to give a report. The chairman may have a copy of the report for the Regent and the Secretary.

**Unfinished business –** Any business from the previous meeting that was not completed.

**New Business –** Discuss the new business for this meeting.

**Business from the floor -** Ask the members if anyone has any new business to bring up at this time.

**Financial Secretary's Report** – This is an optional, occasional report. She reports on the number of members, new applications, number of members who have not paid dues. Do not read names of members who are delinquent; handle that in private.

**Good of the Order** – Presentations, Programs, or message by Spiritual Advisor
**Announcements** - Thanks for refreshments etc.

**Closing prayer and Closing Ode.** Three raps or "Please Stand."

**Meeting is adjourned.**

**Regent:** 1 Rap. The meeting of the Catholic Daughters of the Americas will please come to order.

**Regent:** 3 Raps or "Please Stand." We will now have the opening ceremonies. Please stand for the opening prayer (announce special intentions) led by our Chaplain/Spiritual Advisor/or _______ , followed by the reciting of the Pledge of Allegiance to the Flag of the United States of America.

Attention! Salute! Pledge! I pledge………"

The Opening Ode will be led by______. (Optional)

(Introduce any special guests. Special programs are presented at this time.)

**Regent:** Would the Recording Secretary please call the roll of the officers? Officers please stand as your name is called.

**OR:**

Roll call of officers will be taken silently.

**Regent:** (If no new members, omit this.) Do we have anyone joining the order tonight? If so, would you please come forward and take the pledge? Please repeat after me…….. "We (I) gladly accept membership in the Catholic Daughters of the Americas, and through the presence, of the Spirit in our lives, dedicate ourselves, to the work of this organization, to foster unity and charity, among all men and women, through the love of God."

Members of Court ____, please welcome _________________.

(Before new member is being seated), ____________, would you please tell us a little about yourself? You will take your formal Pledge at the Reception of New Members ceremonies to be held at a date to be announced.

**Regent:** The Recording Secretary, will read the minutes of the ______ meeting. Are there any corrections or additions to the minutes? If not, they stand approved as read. (If there are corrections, the minutes are approved as corrected.) (if minutes are circulated electronically, Regent states, "Are there any additions or corrections to the minutes that were circulated?" If none, Regent states "minutes will be filed as circulated."

**Regent:** Worthy Recording Secretary, is there any correspondence?

**Regent:** The Vice Regent will now read the correspondence from National and State. (She may need to make brief summaries of these releases.)

**Regent:** If there is no objection, correspondence needing action will be taken up under new business, and others will be filed.

**Regent:** May we have the report of the Treasurer? **(**After report is given) Are there any corrections or questions pertaining to the report? If not, the report will be filed.

**Regent:** Worthy Recording Secretary, are there any bills? If there is no objection, the bills are approved.

**Regent:** The next business in order is the reports of the chairmen. (Only chairmen who have something current need to report. Please check with chairmen before setting your agenda. Some suggested reports are as follows:

A. LEADERSHIP – Some committees under this project could be Court Newsletter, Publicity, Telephone Chain, Membership, etc.

B. SPIRITUAL ENHANCEMENT – Funeral Meals, Honor Guard, CDA Day, Retreats, Communion Sundays, Rosaries, Clergy Appreciation, Prayer Lines, Court Socials, Nursing Home Communions, etc.

C. QUALITY OF LIFE – Nursing Home visits & entertainment, Sick cards, Masses, Baby & Bridal Gifts, Hospital & prison visits, Recycling, Awards Banquets, Alzheimer's, Habitat for Humanity, Beautification projects, etc.

D. YOUTH –Youth Masses, JCDA, CCD teachers, RCIA, Youth retreats & socials, Sponsor youth programs, etc.

E. EDUCATION – Local and State Memorial Scholarships, State Memorial cards, CCD program, Teacher aides, Poetry/Essay/Art/Poster Contests, court educational programs, etc.

F. LEGISLATION – Voter Registration, corresponding with state or national legislators, displaying the flag, patriotic programs, participation in pro-life marches, recitation of the pledge, etc.

G. FAMILY– Plan or encourage participation in family activities such as praying the Rosary together, movie or game night, family retreats, and sharing family meal.

**Regent:** The next business in order is unfinished business. (Address matters still pending.)

**Regent:** The next business in order is new business. (Introduce any new business.)

**Regent:** Is there any other business to come before the court?

**Regent:** We will now have the report of the Financial Secretary. (Optional)

**Regent:** The next business in order is a Message from District Deputy/State Representative or another visiting officer if present.

**Regent**: The next business in order is Good of the Order. (Chaplains or Spiritual Advisors may speak at this time. Spiritual Enhancement Chairman may also present at this time. Messages may be moved to the beginning of the agenda if speakers cannot stay for the entire meeting.

**Regent:** Are there any announcements?

**Regent:** 3 raps of the gavel or "Please stand." The closing prayer will be led by __________

**Regent:** The Closing Ode will be led by __________. (Optional)

**Regent:** There being no further business the meeting is adjourned until our next meeting on

______________ at ____PM. at _________Hall.

**Room may be arranged according to facilities.**

Members Members

_________________________ _________________________

_________________________ _________________________

_________________________ _________________________

_________________________ _________________________

_________________________ _________________________

7 8 6

5 4 1 2 3

*Key for room arrangements:

| | |
|---|---|
| 1 | Regent |
| 2 | Vice Regent |
| 3 | Recording Secretary |
| 4 | Financial Secretary |
| 5 | Treasurer |
| 6 | Flag |
| 7 | Banner |
| 8 | Shrine (suggested location) |

Note: No officer should have her back to the membership. Members should not have their backs to the officers.

**District Deputy/State Representative or other visiting officers or Chaplain or speakers should be seated at a place of honor.**

## Standing Rules

National Bylaws of the Order are the only Bylaws that are in effect. Local Courts may and should have Standing Rules but in no way can they conflict with National Bylaws.

Standing Rules

1. They are rules which are related to the details of the administration of an organization such as State or Local Courts, rather than to parliamentary procedure.
2. They can be adopted or changed at any business meeting upon the same conditions as any act of the Court. (Motion, majority vote)
3. They are usually adopted as the need arises.
4. They can be adopted by a majority vote of those present without previous notice.
5. The rule remains in effect until it is rescinded or amended.
6. If a standing rule is temporarily suspended for a particular meeting, the suspension is not binding at future meetings.
7. Standing Rules need to be reviewed at least once a year to see what is still current and what needs to be rescinded or amended.

Examples of Standing Rules

The meeting date, time, and place
Adopt a seminarian
Adopt-a-Child Program
Donate to the use of hall
List certain committees for the year
Sponsor a booth at parish functions
Have a joint function with K of C
Have a joint installation with other Courts
Sponsor a pro-life activity
Gifts to priests, visiting dignitaries

**Court (Number and Name)________________________**

I. **MEETINGS**

A. The regular business meetings of the Court shall be on the ___ of each month.

B. Regular spiritual activity

C. Special liturgical events

D. Socials

II. **Fees and Dues**

A. Dues shall be _____ per year.

B. Reception of New Members

1. Upon reception, each new member to be given_______________

2. Reception of New Members will be held annually in the month of ________.

C. In case of an emergency, the Regent, with approval of court may allow the court to pay the dues of a faithful member.

III. **Courtesies – Members**

A. The Court shall receive Communion in a body annually (or quarterly, or at a time and church [parish] to be selected by the Regent)

1. A Mass offering to be _____

2. The Court shall have a _______________ following the death of a member of the Court. On the death of a member or the immediate family of a member of the Court, a _________________ shall be sent. (Note: Define member of immediate family.)

3. The Court shall present each newly married member with _______________.

4. The Sunshine Chairman (or other) shall be allowed _____per year for cards and stamps.

5. When a member becomes a mother, grandmother, or great grandmother, a donation of $_____ will be sent to the pro-life ________.

**IV. Courtesies - Others**

A. Invite District Deputy/State Representative to all Court functions and assume her expenses, excluding transportation.

1. Give District Deputy/State Representative check/gift at Christmas and/or Receptions/Installations. (Stipulate approximate amount of money to be expended.)

2. Present a monetary gift of not more than ________to newly instituted Court in Arch/Diocese or State or ?

B. Invite all State Officers as guests to special events.

C. Send court newsletters to the National Representative, to all State Officers, and to the District Deputy/State Representative.

**V. Chaplain/Spiritual Advisor**

A. Pay Chaplain/Spiritual Advisor's expenses when attending CDA functions.

B. Order and pay for a SHARE subscription for Chaplain/Spiritual Advisor and pastor(s).

C. Gifts for Chaplain/Spiritual Advisor (Christmas, birthday, anniversary of ordination, end of two-year term, Priest Appreciation Day, etc.) - stipulate when gift should be given and approximate amount of money to be expended.

**VI. Regent**

A. Pay for Regent's expenses incurred while representing the court at official CDA functions. Stipulate which functions.

B. Reimburse Regent's expenses relating to Court activities.

**VII. Special Funds**

A. Convention Fund (how to fund; how to disperse)

B. Scholarship Fund (how to fund; how to disperse)

## FINANCIAL REVIEW GUIDELINES

Financial Review shall be completed every six months - during the month of April for the period of October 1 through March 31 - and during the month of October for the period of April 1 through September 30.

Upon receipt of the Financial Review Form from National, the Regent should give the form to the Treasurer so that she can have the information ready for the Financial Review.

The Financial Review requires the attendance of the following with the appropriate records as noted.

Regent

Vice Regent

Recording Secretary - Minutes Book

Financial Secretary - with receipts from Treasurer, cash book and membership book

Treasurer - with bank statements (including cancelled checks, if available) for six-month period, check stubs, ledger of receipts and disbursements, receipt books, bank deposit books or receipts (if Court has savings account) and Financial Review Form.

Financial Review Committee - three Court members who are appointed by the Court Regent

District Deputy/State Representative

Also useful for Financial Reviews are ruler, red pens, and calculator.

*Where there is patience and humility there is neither anger nor worry.*

*St. Francis*

## CHECKLIST FOR FINANCIAL REVIEW

1. All monies must be received by the Financial Secretary, receipts issued and posted in cash book.
2. All monies received from members are to be correctly posted to the individual member's ledger sheet. Verify entries with cash book.
3. Receipt given by the Treasurer to the Financial Secretary should correspond with entries in cash book.
4. Deposit slips made by the Treasurer should correspond with the receipt issued to the Financial Secretary.
5. Check to see that deposits are entered correctly in check book as well as in the Treasurer's Account Book.
6. Bank statements at the end of the month are to balance with the checkbook as well as with the Treasurer's Account Book.
7. All checks issued must be posted in Treasurer's Account Book.
8. Paid invoices should be filed in a folder properly labeled.
9. Cancelled checks should be kept with bank statements, properly labeled, and kept in a file.
10. Check to see that all bills to be paid are recorded in the Recording Secretary's Minutes Book.
11. Check Recording Secretary's Book to see that all motions requiring financial expenditures have been paid.
12. Make sure that all membership deletions, additions and transfers are being reported, using the correct forms.
13. Make sure Financial Review Forms are properly completed, signed by those present, and mailed.

# Financial Review

either for the period April 1, 20 ______ to September 30, 20 _______

or for the period October 1, 20 ______ to March 31, 20 _______

**Total membership on your records as of September 30 or March 31 was _______**

**COURT NAME** ________________________ **Court #** ____________ **City** ____________ **State** _________

**1.** Total amount paid out by check for **Religious, Charitable, and Educational purposes** Total $____________
Include amounts paid to National Office and State Court for these purposes.

**2. Paid to National Court:**

| | | |
|---|---|---|
| National Dues, Assessments and Insurance | $ ______________ | |
| Supplies, Jewelry and Gift Items | $______________ | |
| Paraphernalia (robes, banner, flags) | $______________ | |
| Other (specify) | $______________ | Total $____________ |

**3. Paid to State Court:**

| | | |
|---|---|---|
| State Dues and Assessments | $______________ | |
| Special State Court Projects | $______________ | Total $____________ |

**FUND BALANCES**

| | LAST REPORT | CURRENT REPORT |
|---|---|---|
| **CHECKING ACCOUNT** | $______________ | $______________ |
| **SAVINGS ACCOUNT** | $______________ | $______________ |
| **MASS FUND** | $______________ | $______________ |
| **MONEY MARKET ACCOUNTS** | $______________ | $______________ |
| **CD'S** | $______________ | $______________ |
| **TREASURY ACCOUNTS** | $______________ | $______________ |
| **OTHER FUNDS (SPECIFY)** | | |
| ____________________ | $______________ | $______________ |
| ____________________ | $______________ | $______________ |

**TOTAL CURRENT FUNDS OF COURT $**__________

We, the undersigned Financial Review Committee of the Court hereby certify that we have reviewed the Court books, examined and checked the bank accounts and that the foregoing report is a true and correct statement of the funds of this Court.

Signature of District Deputy/State Representative if present:

________________________________________

** District Deputy/State Representative must be present for at least one (1) Financial Review per year.*

Signatures of Financial Review Committee

1. ________________________________
2. ________________________________
3. ________________________________

**RETAIN a copy for Court files**

Send **Original Form** to National Office:
**Catholic Daughters Of The Americas**
10 West 71st Street, New York, NY 10023

Send **a copy** to:
**Your State Regent, your State Secretary,**
your District Deputy **or** your State Representative

Report should be returned to appropriate designations by November 1 or May 1 of the current year.

**CHECK LIST FOR REGENTS**

*(Work Sheet)*

Before the first meeting in the fall, plan to have an organizational meeting with the officers and open it to the members. Ask other officers and members for suggestions for Chairmen and Committee members. NOTE: Board Meetings are not permissible.

**Appoint chairmen for standing committees. (Please remember that every court does not have to participate in every part of the program; these are merely suggestions.)**

Leadership________________________________________________________________

Spiritual Enhancement ______________________________________________________

Note: May want to have sub-chairmen under Spiritual Enhancement, i.e.

Liturgies_________________________________________________________________

Church Ministries __________________________________________________________

Priests/Seminarians/Men and Women Religious___________________________________

Interfaith Cooperation_______________________________________________________

Other____________________________________________________________________

Quality of Life______________________________________________________________

Note: May want to have sub-chairmen under Quality of Life, i.e.

Community Issues__________________________________________________________

Worldwide Issues___________________________________________________________

Other_____________________________________________

Youth_____________________________________________________________________

Note: May want to have sub-chairmen under Youth, i.e.

Service to Others____________________________________________________________

Awareness & Appreciation of Diversity____________________________________

Junior Catholic Daughters of the Americas (JCDA)___________________________

Other _______________________________________________________________

Education_____________________________________________________________

Note: May want to have sub-chairmen under Education, i.e.

Scholarships_________________________________________________________

Education Contests___________________________________________________

Religious Education__________________________________________________

Literacy______________________________________________________________

Other _______________________________________________________________

Legislation___________________________________________________________

Note: May want to have sub chairmen under Legislation, i.e.,

Operation Morning Star______________________________________________

Patriotism____________________________________________________________

Family___________________________________________________

Note: May want to have sub-chairmen under Family for example:

Family Life Issues___________________________________________________

Family Health Issues_________________________________________________

Restoration of Family Values__________________________________________

Holy Cross Family Ministries__________________________________________

Publicity/Public Relations_______________________________________________________

Financial Review Committee (need 3) - may be appointed for each financial review period or for 2-year term

_________________________________________________________________________

_________________________________________________________________________

_________________________________________________________________________

Ceremonial Coordinator_________________________________________________________

**Special Committees**

Membership________________________________________________________________

Telephone ________________________________________________________________

Sunshine__________________________________________________________________

Newsletter Editor___________________________________________________________

Standing Rules (See Attachment 5 – Sample of Standing Rules)______________________

_____________________________________________________________________________

Ways and Means Chairman/Committee____________________________________________

Budget (Treasurer should be a member of this Committee) (See Attachment 24 – Local Court Budget)

_________________________________________________________________________

_________________________________________________________________________

_________________________________________________________________________

Parliamentarian (Optional)______________________________________________________

**Miscellaneous Planning**

Calendar

Reception of New Members

Priest Appreciation Day

National CDA Day

November Memorial Mass

Retreat or Day of Recollection

Education Contest

Have "outside" speakers give presentations

Sponsor membership contest/drive for new members

Send newsletters every month or quarterly

Fundraisers

**Financial Planning**

Attendance at Biennial State Convention

Attendance at Biennial National Convention

Attendance at District Meetings/Workshops

## COMMITTEES

Kinds of Committees (Appointed by presiding officer unless stated differently in Bylaws)

Standing Committees - established permanently by Bylaws
Special Committees - set up to handle specific tasks (i.e., planning an event, Standing Rules, Budget, etc.)

Size of Committee

Three to Five when studying a matter to make recommendations to Court
Few members when acting on a project

Rules

Different from Court meeting
Informality is appropriate
Chair should not let matters get out of hand but should direct discussion to accomplish goal(s)
Meeting should not become a "bull" or "gossip" session
Chairman can make motions and participate actively in any debate and vote
Quorum is a majority of members of committee

Inaction of Committee

If a member fails to attend meetings, she should be removed. Only the Regent can remove and replace.

If a Chairman fails to call meetings, any two members may call a meeting.

Regent is ex-officio member of all committees except Nominating Committee.

Has right (but not a duty) to attend committee meetings. May make motions, participate in discussion and vote.

Note: Regent should use discretion when attending a committee meeting and remember that when a Chairman and committee have been appointed, they have been empowered to act for the good of the Court. When attending a committee meeting, she should not "take over" meeting but be an "ex-officio" member at that meeting.

Form **8822**
(Rev. December 2008)
Department of the Treasury
Internal Revenue Service

# Change of Address

▶ Please type or print.
▶ See instructions on back. ▶ Do not attach this form to your return.

OMB No. 1545-1163

**Part I** Complete This Part To Change Your Home Mailing Address

Check **all** boxes this change affects:

**1** ☐ Individual income tax returns (Forms 1040, 1040A, 1040EZ, 1040NR, etc.)
▶ If your last return was a joint return and you are now establishing a residence separate from the spouse with whom you filed that return, check here . . . . . . . . . ▶ ☐

**2** ☐ Gift, estate, or generation-skipping transfer tax returns (Forms 706, 709, etc.)
▶ For Forms 706 and 706-NA, enter the decedent's name and social security number below.

▶ Decedent's name ▶ Social security number

**3a** Your name (first name, initial, and last name) | **3b** Your social security number

**4a** Spouse's name (first name, initial, and last name) | **4b** Spouse's social security number

**5** Prior name(s). See instructions.

**6a** Old address (no., street, city or town, state, and ZIP code). If a P.O. box or foreign address, see instructions. | Apt. no.

**6b** Spouse's old address, if different from line 6a (no., street, city or town, state, and ZIP code). If a P.O. box or foreign address, see instructions. | Apt. no.

**7** New address (no., street, city or town, state, and ZIP code). If a P.O. box or foreign address, see instructions. | Apt. no.

**Part II** Complete This Part To Change Your Business Mailing Address or Business Location

Check **all** boxes this change affects:

**8** ☐ Employment, excise, income, and other business returns (Forms 720, 940, 940-EZ, 941, 990, 1041, 1065, 1120, etc.)
**9** ☐ Employee plan returns (Forms 5500, 5500-EZ, etc.)
**10** ☐ Business location

**11a** Business name | **11b** Employer identification number

**12** Old mailing address (no., street, city or town, state, and ZIP code). If a P.O. box or foreign address, see instructions. | Room or suite no.

**13** New mailing address (no., street, city or town, state, and ZIP code). If a P.O. box or foreign address, see instructions. | Room or suite no.

**14** New business location (no., street, city or town, state, and ZIP code). If a foreign address, see instructions. | Room or suite no.

**Part III** Signature

Daytime telephone number of person to contact (optional) ▶ ( )

**Sign Here**

▶ Your signature Date | ▶ If Part II completed, signature of owner, officer, or representative Date

▶ If joint return, spouse's signature Date | ▶ Title

**For Privacy Act and Paperwork Reduction Act Notice, see back of form.** Cat. No. 12081V Form **8822** (Rev. 12-2008)

## Purpose of Form

You can use Form 8822 to notify the Internal Revenue Service if you changed your home or business mailing address or your business location. If this change also affects the mailing address for your children who filed income tax returns, complete and file a separate Form 8822 for each child. If you are a representative signing for the taxpayer, attach to Form 8822 a copy of your power of attorney.

**Changing both home and business addresses?** If you are, use a separate Form 8822 to show each change.

## Prior Name(s)

If you or your spouse changed your name because of marriage, divorce, etc., complete line 5. Also, be sure to notify the Social Security Administration of your new name so that it has the same name in its records that you have on your tax return. This prevents delays in processing your return and issuing refunds. It also safeguards your future social security benefits.

## Addresses

Be sure to include any apartment, room, or suite number in the space provided.

### P.O. Box

Enter your box number instead of your street address only if your post office does not deliver mail to your street address.

### Foreign Address

Enter the information in the following order: city, province or state, and country. Follow the country's practice for entering the postal code. Please do not abbreviate the country name.

### "In Care of" Address

If you receive your mail in care of a third party (such as an accountant or attorney), enter "C/O" followed by the third party's name and street address or P.O. box.

## Signature

If you are completing Part I, the taxpayer, executor, donor, or an authorized representative must sign. If your last return was a joint return, your spouse must also sign (unless you have indicated by checking the box on line 1 that you are establishing a separate residence).

If you are completing Part II, an officer, owner, general partner or LLC member manager, plan administrator, fiduciary, or an authorized representative must sign. An officer is the president, vice president, treasurer, chief accounting officer, etc.

**CAUTION** *If you are a representative signing on behalf of the taxpayer, you must attach to Form 8822 a copy of your power of attorney. To do this, you can use Form 2848. The Internal Revenue Service will not complete an address change from an "unauthorized" third party.*

## Where To File

Send this form to the Department of the Treasury, Internal Revenue Service Center, and the address shown next that applies to you. Generally, it takes 4 to 6 weeks to process your change of address.

**Note.** If you checked the box on line 2, or you checked the box on both lines 1 and 2, send this form to: Cincinnati, OH 45999-0023.

### Filers Who Completed Part I (You checked the box on line 1 only)

| IF your old home mailing address was in . . . | THEN use this address . . . |
|---|---|
| District of Columbia, Maine, Maryland, Massachusetts, New Hampshire, Vermont | Andover, MA 05501-0023 |
| Alabama, Florida, Georgia, North Carolina, South Carolina, Virginia | Atlanta, GA 39901-0023 |
| Kentucky, Louisiana, Mississippi, Tennessee, Texas | Austin, TX 73301-0023 |
| Alaska, Arizona, California, Colorado, Hawaii, Idaho, Illinois, Iowa, Kansas, Minnesota, Montana, Nebraska, Nevada, New Mexico, North Dakota, Oklahoma, Oregon, South Dakota, Utah, Washington, Wisconsin, Wyoming | Fresno, CA 93888-0023 |
| Arkansas, Connecticut, Delaware, Indiana, Michigan, Missouri, New Jersey, New York, Ohio, Pennsylvania, Rhode Island, West Virginia | Kansas City, MO 64999-0023 |
| APO and FPO Addresses<br>American Samoa<br>Guam:<br>Nonpermanent residents<br>Puerto Rico (or if excluding income under Internal Revenue Code section 933)<br>Virgin Islands:<br>Nonpermanent residents<br>Nonresident aliens and dual-status aliens<br>Foreign country:<br>U.S. citizens and those filing Form 2555, Form 2555-EZ, or Form 4563 | Austin, TX 73301-0023 USA |
| Guam:<br>Permanent residents | Department of Revenue and Taxation<br>Government of Guam<br>P.O. Box 23607<br>GMF, GU 96921 |
| Virgin Islands:<br>Permanent residents | V.I. Bureau of Internal Revenue<br>9601 Estate Thomas<br>Charlotte Amalie<br>St. Thomas, VI 00802 |

### Filers Who Completed Part II

| IF your old business address was in . . . | THEN use this address . . . |
|---|---|
| Connecticut, Delaware, District of Columbia, Georgia, Illinois, Indiana, Kentucky, Maine, Maryland, Massachusetts, Michigan, New Hampshire, New Jersey, New York, North Carolina, Ohio, Pennsylvania, Rhode Island, South Carolina, Tennessee, Vermont, Virginia, West Virginia, Wisconsin | Cincinnati, OH 45999-0023 |
| Alabama, Alaska, Arizona, Arkansas, California, Colorado, Florida, Hawaii, Idaho, Iowa, Kansas, Louisiana, Minnesota, Mississippi, Missouri, Montana, Nebraska, Nevada, New Mexico, North Dakota, Oklahoma, Oregon, South Dakota, Texas, Utah, Washington, Wyoming, any place outside the United States | Ogden, UT 84201-0023 |

**Privacy Act and Paperwork Reduction Act Notice.** We ask for the information on this form to carry out the Internal Revenue laws of the United States. Our legal right to ask for information is Internal Revenue Code sections 6001 and 6011, which require you to file a statement with us for any tax for which you are liable. Section 6109 requires that you provide your social security number on what you file. This is so we know who you are, and can process your form and other papers.

Generally, tax returns and return information are confidential, as required by section 6103. However, we may give the information to the Department of Justice and to other federal agencies, as provided by law. We may give it to cities, states, the District of Columbia, and U.S. commonwealths or possessions to carry out their tax laws. We may also disclose this information to other countries under a tax treaty, to federal and state agencies to enforce federal nontax criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism.

The use of this form is voluntary. However, if you fail to provide the Internal Revenue Service with your current mailing address, you may not receive a notice of deficiency or a notice and demand for tax. Despite the failure to receive such notices, penalties and interest will continue to accrue on the tax deficiencies.

You are not required to provide the information requested on a form that is subject to the Paperwork Reduction Act unless the form displays a valid OMB control number. Books or records relating to a form or its instructions must be retained as long as their contents may become material in the administration of any Internal Revenue law.

The time needed to complete and file this form will vary depending on individual circumstances. The estimated burden for individual taxpayers filing this form is approved under OMB control number 1545-0074 and is included in the estimates shown in the instructions for their individual income tax return. The estimated burden for all other taxpayers who file this form is 16 minutes.

If you have comments concerning the accuracy of this time estimate or suggestions for making this form simpler, we would be happy to hear from you. You can write to the Internal Revenue Service, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Ave. NW, IR-6526, Washington, DC 20224. Do not send the form to this address. Instead, see *Where To File* on this page.

**Local Court Officers**
for the two-year period **20____ to 20____ Election held on May ___, 20____**

**Court** ________________________________________ **#**________

**City** ________________________________________ **State**___________

The **Financial Secretary** should complete this form immediately following the election held at the **May monthly meeting.** *Even if you do not have any changes in officers or have been recently instituted, this form must be completed every two years.* Your prompt attention to this request will be appreciated. Please PRINT neatly.

**Please submit ORIGINAL form to:**
**Catholic Daughters of the Americas**
**10 West 71st Street, New York, NY 10023**

**Send one copy to your State Regent**
**(Territorial Courts: send to your National Supervisor)**

**Send one copy to your District Deputy**

**Regent:** Name ________________________________________ ☐ new ☐ re-elected

Address ______________________ City ________________ State _____ Zip __________

E-Mail ______________________ Phone# (_______)__________ Cell# (_______)__________

**Vice Regent:** Name ________________________________________ ☐ new ☐ re-elected

Address ______________________ City ________________ State _____ Zip __________

E-Mail ______________________ Phone# (_______)__________ Cell# (_______)__________

**Recording Secretary:** Name ________________________________________ ☐ new ☐ re-elected

Address ______________________ City ________________ State _____ Zip __________

E-Mail ______________________ Phone# (_______)__________ Cell# (_______)__________

**Financial Secretary:** Name ________________________________________ ☐ new ☐ re-elected

Address ______________________ City ________________ State _____ Zip __________

E-Mail ______________________ Phone# (_______)__________ Cell# (_______)__________

**Treasurer:** Name ________________________________________ ☐ new ☐ re-elected

Address ______________________ City ________________ State _____ Zip __________

E-Mail ______________________ Phone# (_______)__________ Cell# (_______)__________

**Chaplain/Spiritual Advisor:** Name ____________________________________ ☐ new ☐ returning

Address ______________________ City ________________ State _____ Zip __________

E-Mail ______________________ Phone# (_______)__________ Cell# (_______)__________

The most important tip to remember is that the Recording Secretary is writing the history of the Local Court during the time she is secretary. Minutes should be concise, but informative. They should be written in third person.

**Content of Minutes:**

1. Kind of meeting - regular, special, annual, etc.
2. Name of assembly, organization, board or committee
3. Date, time, and place of meeting
4. Roll call of officers
5. The name of the presider
6. The fact that a quorum is present
7. Whether the minutes of previous meeting were approved as written or as corrected
8. Name of member who makes motion, but not the one who seconds
9. All motions (except those withdrawn), point of order and appeals, and whether or not a motion is adopted. (Note: Each subject and each motion is recorded as a separate paragraph.) Highlight all motions that have money attached to them for ease of financial review.
10. When there is an election by ballot, the full report of tellers is entered in minutes. Any other counted vote should be included stating number for and against the vote.
11. Minutes are signed by Recording Secretary (or Recording Secretary pro-tem). Note: "Respectfully submitted" is no longer necessary.

***SAMPLE MINUTES***

The regular meeting of Court ____________________No.___ was called to order by Regent Sally Brown on Thursday, September 22, 20____, at 8:00 p.m. at St. John's Hall. Roll call of officers found all officers were present. The minutes of the last meeting were read and approved (or approved as corrected).

The correspondence was read.

(list correspondence)

The Treasurer reported a balance on hand as of August 31, 20___ of $573.15. The report will be filed. (The Treasurer's report may be recapped as noted in Recording Secretary's section.)

By General Consent the following bills were approved for payment.

(list bills)

The Special Committee that was appointed to investigate and report programs for the coming year gave its report and on motion of ________________ the following program dates and functions were adopted after being amended:

(list dates and programs)

_______________________ moved that the proceeds from the August Potluck be given to ____________________charity. MOTION ADOPTED.

________________________moved that $50.00 be given to the __________Society in reply to their letter. MOTION ADOPTED.

________________________moved that $1,000.00 be transferred from the General Fund to ______________________________the Fund. MOTION DEFEATED.

The meeting adjourned at 9:30 PM.

_______________________________ _____________________________

Recording Secretary Date
Adopted as Read

Recording Secretary Date
Adopted as Corrected

Note:

(1) Any opening ceremonies such as Invocation, Prayer, Rosary being said, etc. are not shown in the Minutes as they are not part of the business of the meeting.

(2) Correspondence: If action taken on item of correspondence, it is taken up under New Business.

(3) It is recommended that a motion to expend money is highlighted for ease in performing financial review.

# FLOW CHART OF FUNDS

## Source of Funds

Members Dues

Fundraisers

Donations

Bank - Interest

## Financial Secretary

Collects all Monies

Collects Dues

Receives Total Gross Receipts from Chairman of Fundraisers

Receives Cash Donations

## Treasurer

Receives monies from Financial Secretary

Issues a receipt to the Financial Secretary

Deposits monies in CDA account at bank

Reports interest earned to Financial Secretary

Pays Bills

NOTE: Applications must be filled out in ink or typed.
**COMPLETE ALL BLANKS**
Please read over carefully.

Print or Type:
(Miss)
I, (Mrs.) ______________________________

Address ____________ City ____________ State ______ Zip ________

Telephone ____________ E-mail ____________

hereby apply for membership in the Catholic Daughters of the Americas® through

Court ____________ No. ________ City ____________ State ______

and do declare and say:

1. I am a member of ______________________________ Catholic Church

   located at ______________________________

2. I will abide by the Bylaws, Rules and Regulations of the Order.

3. I am over eighteen (18) years of age.

Applicant's Legal Signature ______________________________

Date of Application ______________________________

**PLEASE NOTE:**
**White** original copy must be sent to the National Office
**Yellow** copy must be sent to the State
**Pink** copy is kept for your court records

*KINDLY SUPPLY information requested below*

**Catholic Daughters of the Americas®**

APPLICATION FOR

# MEMBERSHIP

______________________________
*(Name)*

Date of Pledge ______________________________

Court ____________ No. ________

City ____________ State ________

______________________________
*(Signature of Regent)*

**NOTE:** The Financial Secretary, **within five (5) days** after the pledge of the applicant, shall forward the **white form**, properly filled out, to the National Office **at 10 West 71st Street, New York, NY 10023**

Order #101 (Rev. 2013)

**NOTE:** Applications must be filled out in ink or typed.

**COMPLETE ALL BLANKS**

*Please read over carefully before signing*

*Print or Type*

(Miss)
I, (Mrs.)________________________________________

Address____________________City________State_____Zip______

hereby apply for reinstatement in the CATHOLIC DAUGHTERS OF THE AMERICAS through

Court____________________No._______City________State_____

And do declare and say:

1. I am a member of ________________________Catholic Church
2. (a) I previously joined Court________________________No.______

   on ________ *(date joined)*

   (b)Surname at time of application________________________

   (c) Date Membership Terminated________________________

   (d) Membership terminated by Forfeiture__________Resignation__________
3. I will abide by the Bylaws and Rules and Regulations of said Order.
4. I am over eighteen (18) years of age.

Applicant's Telephone No.__________________E-Mail______________

Applicants legal signature__________________________________

***PLEASE NOTE:***

***Original*** *copy to be sent to the National Office*
***Send*** *a copy to your state*
***Keep*** *a copy for your records*

*KINDLY SUPPLY information requested below*

**CATHOLIC DAUGHTERS OF THE AMERICAS**

**APPLICATION FOR**

# RENEWAL

________________________________
*(name)*

*Date of Renewal*_____________*20*___

*COURT*________________*NO.*______

*CITY*________________*STATE*_____

________________________________
*(Signature of Regent)*

***NOTE:*** The Financial Secretary within five (5) days after the renewal of the applicant shall forward this form properly filled out to the National Office at 10 West 71st Street, New York, NY 10023

*Order #100 (Rev. 2002)*

*TRANSFER FORM*

**CATHOLIC DAUGHTERS OF THE AMERICAS**

NOTE: TO BE COMPLETED BY FINANCIAL SECRETARY OF COURT FROM WHICH MEMBER IS TRANSFERING. MUST BE SIGNED BY REGENT AND FINANCIAL SECRETARY

______________, 20__________

*THIS IS TO CERTIFY THAT*
*Print or Type:*
(Miss)
I, (Mrs.)_______________________________________________

Address______________________City__________State______Zip________

WAS ADMITTED TO MEMBERSHIP IN

Court_______________________No.__________City____________State______

ON_____________________, __________(date joined)

SHE HAS PAID ALL INDEBTEDNESS UP TO_______________________________
THIS TRANSFER CARD IS GRANTED BY:

______________________________, REGENT

______________________________, FINANCIAL SECRETARY

TO BE COMPLETED BY TRANSFERRING MEMBER:
Herewith is my transfer card from:

Court_______________________________________________, No.

Requesting membership in Court______________________________No.

Signature of transferring Applicant_________________________________

Address______________________City______________State______Zip________

Telephone_____________________E-mail______________________________

TO BE COMPLETED BY FINANCIAL SECRETARY OF NEW COURT TO WHICH THE MEMBER TRANSFERS, THE FINANCIAL SECRETARY OF THE NEW COURT SEND THE APPLICATION TO NATIONAL OFFICE:

RECEIVED IN COURT________________________, NO.________ ON ____________, 20____

______________________________ FINANCIAL SECRETARY

***PLEASE NOTE:***
***Original** copy to be sent to the National Office*
***Send** a copy the State*
***Keep** a copy for your records*

***KINDLY SUPPLY** information requested below*

**CATHOLIC DAUGHTERS OF THE AMERICAS**

**APPLICATION FOR**

# TRANSFER FORM

______________________________

______________________________

*(name)*

***TRANSFER OF MEMBERSHIP FROM***

***COURT***_____________________***NO.***_______

***CITY***_____________________***STATE***_____

***TO:***

***COURT***_____________________***NO.***_______

***CITY***_____________________***STATE***_____

______________________________

*(Signature of Regent)*

***IMPORTANT:** TRANSFER FORMS ARE VALID ONLY FOR NINETY (90) DAYS FROM THE DATE ISSUED.*

***NOTE:*** The Financial Secretary shall forward this Transfer Form properly filled out to the National Office at 10 West 71st Street, New York, NY 10023 within five days after the transfer member is received into the Court.

*Order #102 (Rev. 2002)*

# MEMBER DELETION REPORT

STATE | COURT NUMBER 0 0 | COURT NAME | DATE ____________

COMPLETE THIS REPORT WHEN YOU WISH TO DELETE MEMBERS FROM YOUR COURT, WHETHER FOR DEATH, FORFEITURE, RESIGNATION OR TRANSFER. BE SURE TO INCLUDE THE EXACT DATE (MONTH, DAY, YEAR) THE DELETION TOOK EFFECT. THE FOLLOWING CODE LETTERS **MUST** BE USED TO REMOVE MEMBERS FROM YOUR COURT'S RECORDS.

D-DECEASED F-FORFEITURE R-RESIGNATION TO-TRANSFER OUT DL-DUPLICATE LISTING

USE SPACES BELOW FOR DEATHS, FORFEITURES AND RESIGNATIONS ONLY

| MEMBER NUMBER | FIRST NAME | LAST NAME | CODE | MONTH | DATE | YEAR |
|---|---|---|---|---|---|---|
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |

USE SPACES BELOW FOR TRANSFERS ONLY

| MEMBER NUMBER | FIRST NAME | LAST NAME | | MONTH | DATE | YEAR |
|---|---|---|---|---|---|---|
| | | | TO | | | |

TRANSFER TO STATE | COURT NUMBER 0 0

| MEMBER NUMBER | FIRST NAME | LAST NAME | | MONTH | DATE | YEAR |
|---|---|---|---|---|---|---|
| | | | TO | | | |

TRANSFER TO STATE | COURT NUMBER 0 0

Send **PINK** copy to
**CATHOLIC DAUGHTERS OF THE AMERICAS**
10 West 71st Street, New York, NY 10023
Send **BLUE** copy to your **STATE SECRETARY**
Retain **WHITE** copy for Court Files

Order #162

**INFORMATION CORRECTION FORM**

CHANGE OR CORRECTION..PLEASE CHECK APPROPRIATE BOX:

- ☐ LAST NAME
  (PREVIOUS LAST NAME)________________________
- ☐ FIRST NAME
- ☐ STREET ADDRESS ☐ CITY
- ☐ STATE ☐ ZIP

SEND GREEN COPY TO:
CATHOLIC DAUGHTERS OF THE AMERICAS
10 WEST 71ST STREET
NEW YORK, NY 10023
(RETAIN WHITE COPY FOR YOUR RECORDS)

**IF MEMBER IS AN OFFICER**
**OFFICER LIST TITLE:**

________________________

MEMBER NUMBER (MUST BE COMPLETED)

COURT

| STATE | COURT NUMBER | |
|---|---|---|
| | 0 0 | |

| FIRST NAME | M.I. | LAST NAME |
|---|---|---|
| | | |

| STREET ADDRESS |
|---|
| |
| |

| CITY | STATE | ZIP CODE |
|---|---|---|
| | | |

**Catholic Daughters of The Americas**

ORDER FORM

DATE______________

Court No. ............................ City ............................................ State ............................................

Ship to..........................................................................................................................................

Address................................................ City............................ State...................... Zip......................

Signature........................................................ Approved................................................................................ Regent

Financial Secretary or Recording Secretary

*WILL YOU PLEASE USE THIS DUPLICATE ORDER FORM ONLY FOR ORDERING SUPPLIES.*
*THE COPY REMAINS IN THE BOOK FOR FUTURE REFERENCE BY YOUR COURT.*

**TREASURER'S REPORT**
(prepared in triplicate)

Court Name______________________No. ________Date_________________________
(present mtg. date, i.e., 5/10/__)

Balance as of (previous month, i.e. 4/1/__) ______________

Receipts as of (thru end of month, i.e. 4/30/_)

Dues ____________

Fall Fundraiser ____________

Total Receipts ____________

Disbursements as of (thru end of month, i.e. 4/30/__)

Check # National Dues ____________

Check # Habitat for Humanity ____________

Total Disbursements ____________

Balance on hand as of (thru previous month, i.e. 4/30/__)________________________

______________________________(Treasurer)

Committed Funds, i.e.

Adopt-a-Child__________________

National Conv. Fund_____________

State Conv. Fund________________

Anniversary Fund_______________

Working Balance _________________

Note: If Court has any committed (special or designated) funds, then those should be reported separately so that all members are aware of amount of monies in special fund accounts vs. the actual working balance.

**Budget for Local Court**

I. Administration

A. Receipts

1. Dues (number of members times amount of annual dues) i.e.100 members x $20.00 = $2,000.00
2. Fundraising or similar, silent auction, bake-less bake sale (only from members)

B. Disbursements

1. Dues to state and national; liability insurance
2. Rent, newsletters, postage, supplies, expense of delegates to workshops, state and/or national conventions

Note: Receipts should be more than or equal to disbursements.

II. Charity

A. Receipts

1. Various fundraisers (luncheons, fashion shows, drawings, etc.), open to public
2. Donations

B. Disbursements

1. Charities such as National and State Projects, etc.
2. Local charities

Special Notes: Budget should be prepared as early as possible at the beginning of a new CDA year. Regents should appoint a Budget Committee which should include the Treasurer.

It is recommended that the Budget Committee review the budget part way through the year and adjust the budget if necessary.

**Although the Budget is approved, the standing rules must state that items in the adopted budget are approved for payment. If not, a motion must be made to pay them.**

## Retention of Records

### Office of Regent

| | |
|---|---|
| All Contracts and Agreements | Seven Years |
| Files and fidelity bonds for Financial Secretary and Treasurer | Permanently |
| All insurance records including policy numbers and notices of changes/cancellations of such policies | Three years |
| Tax records including Federal ID numbers | Permanently |
| All documents substantiating claims for settlement and/or rejection including conflict resolution | Seven years |
| Correspondence: | |
| National Quarterly and/or State Newsletters | |
| Circle of Love Biennial Reporting Forms | |
| All other important documents | Three years |

### Office of Vice Regent

| | |
|---|---|
| Record of paraphernalia | |
| Flag and Banner | |
| Blessed Mother Statue | |
| Record of robes (condition of robes and in whose possession) | Permanently |

### Office of Recording Secretary

| | |
|---|---|
| Record of minutes of meetings (very important history of court) | Permanently |
| Record of Treasurer's monthly financial report | Three years |

### Office of Financial Secretary

| | |
|---|---|
| Membership record book | Permanently |
| Copies of change of addresses, additions, deletions, transfers, and dues receipt book | Three years |

### Office of Treasurer

| | |
|---|---|
| Record of Treasurer's book/ledger | Permanently |
| Cancelled checks and checkbook registers | Seven years |
| Savings Account books | Seven years |
| Bank statements, deposit slips, and paid bills | Five years |
| Stop payment orders | Three years |
| Monthly Treasurer's financial report | Three years |

NOTE:

| | |
|---|---|
| Deeds, mortgages and/or other property for courts owning house Or other real property | Permanently |