

Finance Committee Roles and Responsibilities

Approved by UUCWI Board of Trustees , January 10, 2012

Edited 5/1/2016

Purpose: To monitor the financial health of the Congregation and make recommendations for preserving it.

Nature: This is a standing committee.

Key Responsibilities:

- Advise the Board of Trustees in assuring that mechanisms are in place for planned giving via endowments and bequests, for an annual canvass for operating funds, and for the raising of additional funds as required, including the support of capital projects
- Monitor, evaluate, and recommend changes as needed for effective management of the financial affairs of the congregation
- Assist the treasurer in his or her duties as requested (Note: this includes reviewing any requests for fund raisers)
- Preserve the tax-exempt status of organization
- Review Finance committee performance annually and recommend any needed revisions to this statement of its role

Coordinates with:

Board of Trustees, Treasurer, Stewardship chair, Capital Campaign chair (if any), Auction chair

Ex Officio members:

- Treasurer
- Vice President