



Society of St. Vincent de Paul
Rockford Council
Annual Report Policy

Annual Report Policy for Society of St. Vincent de Paul Rockford Council and Conferences

In order for the Society of St. Vincent de Paul Rockford Council to maintain its non-profit status, i.e. 501 (c)(3) status, the Rockford Council must file a Federal Form 990 tax return. For this and for the required annual report to the National Council, proper financial accounting is essential.

The reason for this policy is to promote timely and accurate reporting by each conference. The fiscal year for the Society of St. Vincent de Paul is from October 1 to September 30 of the following year. The conference deadline for the submission of the Annual Conference Report and the 990 Supplemental Information to the District presidents is October 31st. The Districts should have all conferences and the District annual report submitted by November 7th. Ideally, the Council treasurer will submit the Rockford Council's Federal tax return by December 15th.

So that conferences are able to submit their annual reports on time, careful records should be kept on a monthly basis. At fiscal year's end it is then straightforward to summarize the information and enter it into the annual report form provided online by the National Council.

The annual report should be completed online at www.svdpmembers.com for each conference. Conference treasurers should login on, enter the Annual Report data and save the report as often as needed but NOT finalize it. Once all of the data has been entered, the district president and treasurer should be notified. Conferences should also complete the 990 Supplemental Information form which is forwarded by the District presidents to all conferences in September. This should be returned, along with the September 30 bank statement(s) to the District president to review. After confirming the ending balances, the District presidents should finalize the annual reports. As the conference reports are completed and finalized, the district president or designee, forwards the Supplemental form and bank statement to the Council treasurer. District reports are also completed online and finalized by the District president/treasurer. The Council treasurer then uses all input to assemble the Federal Form 990 tax return and submit all annual reports to the National office.

It is incumbent on the District presidents to ensure that all conferences under their care have the ability to enter their financial information onto the National database. Conferences that do not have the resources for data entry on the database should be identified. The Council and the District will provide assistance and training to those conferences that require assistance. Likewise, conferences that may be having difficulties meeting the deadline or producing accurate reports, should be identified so that steps can be taken to resolve the problem.

The Rockford Council appreciates those districts and conferences that have been accurate and timely in submitting their reports.

Deadlines: October 31 st	Annual Conference Report submitted
	990 Supplemental Information
November 7 th	Annual Conference Report finalized
	District Annual Report submitted & finalized