



Rocky Mountain District  
**Annual Financial Review Information for Chapters**  
Last Revised – December 2016

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## Annual Financial Review

The Annual Financial Review form is one of the three “required filings” that are due to the District Secretary each year **for all chapters** in Rocky Mountain District.

Each year, two chapter officers (usually the Treasurer and one other officer), must compile and attest to a summation of your previous year financials. The BHS and RMD Web sites offer the form that you should use (the **Annual Financial Review** form). This form must be completed, signed and forwarded to the Rocky Mountain District Secretary. You can scan and e-mail, or snail mail the form. It is a relatively brief form that takes only a few minutes to fill out and it should be completed as soon as possible after the first of the year. Most of the necessary information comes from your December bank statement. This document is due to the District Secretary by a February 28th deadline for the preceding year. The other two “required filings” are your annual Secretary of State filing (biennial in Nebraska) due on the anniversary of your last filing, and your 990-N which is due the IRS each year on May 15<sup>th</sup>. Please see the “RMD Required Financial Filings Information” page for further explanation.

This form is all that is required. Please **do not send** 25 pages of financial documents such as Profit and Loss Statements, Balance Sheets, and the like to the District Secretary. It is NOT necessary to send full financials. The requirement is only this single-page form, and nothing more.

Keep in mind that this form is a requirement **BEFORE** a show can be licensed by the District Secretary, so it is in your best interests **NOT** to wait until the last minute. Follow all deadlines and your chapter will be “golden”!

For information concerning your chapter’s Annual Financial Review, or other required filings, please contact the District Secretary: [tonychiro@juno.com](mailto:tonychiro@juno.com).

**Tony Pranaitis, Secretary**  
Rocky Mountain District  
12713 W. 8<sup>th</sup> Ave.  
Golden, CO 80401-4646  
720-618-3725  
[tonychiro@juno.com](mailto:tonychiro@juno.com)