Officer Transition Checklist

As the outgoing Chapter President, it is your responsibility to inform your incoming President of key items during their term as Chapter President. Please use the checklist below to assist in your "passing the baton".

Chapter President – Year End Checklist

___ Review with Incoming President Role Description & Responsibilities

___ Walk Incoming President through the IRS compliance requirements:

- Review Board Meeting Agenda's and Minutes
- Review Chapter Bylaws to ensure they are current
- Chapter President must log into and review chapter activities in Quickbooks online at least once per month.

- Arrange with Chapter Treasurer who will be uploading the documents into the Chapter's President & Treasurers Private Group in the Member Network (either the President or the Treasurer must do this task monthly)
- The Chapter Treasurer is to provide monthly bank reconciliations and statements which are uploaded into their Chapter's appropriate "Chapter President's and Treasurer's Group" in the IRWA Member Network.
- All Canadian Chapters are to, via email submit to the IRWA CFO quarterly (by end of each month following a quarter. i.e. July-August-September, report filed by the end of October etc.), GST/HST reports for submission to the Canadian Revenue Association (CRA).

___ Complete fiscal year end taxes for the year you were President and upload/file by August 15th

___ Review each Chapter & Region Groups in the Member Network

___ By July 1st, have incoming President submit roster of chapter officers and committee positions with contact information to Mariah Carrillo at HQ.